ANALYSIS OF SALESFORCE CRM IN MODERN ENTERPRISES

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1. SUMMARY

1.1 Purpose of the Analysis

The primary purpose of this analysis is to explain the scope and functionality of integrating Salesforce CRM and how enterprises benefit from both inbuilt and custom cloud features.

1.2 Key Findings

- **Widespread Integration**

  Almost every 500 fortune companies listed is been using the Salesforce for their CRM for their sales (Sales cloud) and marketing (Marketing Cloud) and data analysis (Tableau). For instance big tech companies like Apple, Google and Spotify.

- **Cost of implementation**

  The adoption cost can be high for small enterprise because licensing cost is high and it needs skilled administrators and developers.

- **Strong Market**

  Since it provides end to end business solutions, cloud based it acquires 24% of the CRM market, leading other CRM's like ZOHO CRM, Microsoft Dynamics 360 and so on.

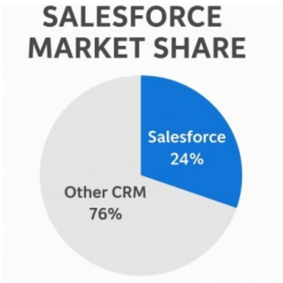


Fig 1.1- **Salesforce market**

- **Future**

  While witnessing the growth of the Salesforce, it is likely to remain a market leader for foreseeable future for next 25 years. While, other CRM are shifting towards cloud and AI, Salesforce set a bench mark by which it entered the market with SaaS model.

2. Introduction

2.1 What is CRM?

CRM stands for Customer relationship management where the enterprises streamline their sales pipeline, brands, analyze their products through software. The CRM establishes the strong relationship with the customer.

2.2 Structure of CRM

Three layers

- User Interface layer: Dashboards, reports.
- Application layer: Sales, marketing, service and analysis.
- Data layer: Database, security settings.

USER INTERFACE LAYER Dashboards | Reports
Application Layer Sales | Marketing | Service | Analysis
Data Layer Database | Security settings

Fig 2.1- **Layers of CRM**

2.3 Why CRM important for an enterprise?

It acts as a central entity which stores customer data, helps in data analysis, increase the sales of the product, efficient marketing, boosts customer support, decision making through the data.

2.4 Introduction to Salesforce CRM

Salesforce is one of the key player in the CRM department, which was developed by Marc Benioff in 1999, headquartered in San Francisco, USA and entered the industry through cloud based model called SaaS (Software as a service). It uses SOQL (Salesforce Object Query Language), similar to SQL. It had led the CRM for the past 25 years since its development.

3. Salesforce CRM Overview

3.1 Interface

While going through the Salesforce interface, there are two interface namely Salesforce classic and lightning experience interfaces. From the year of development to 2015 Salesforce was using it classic interface, then shifted to lightning which is known for drag and drop interface. To know the exact difference it is mandatory to navigate to www.radnip.com/classiclightning.

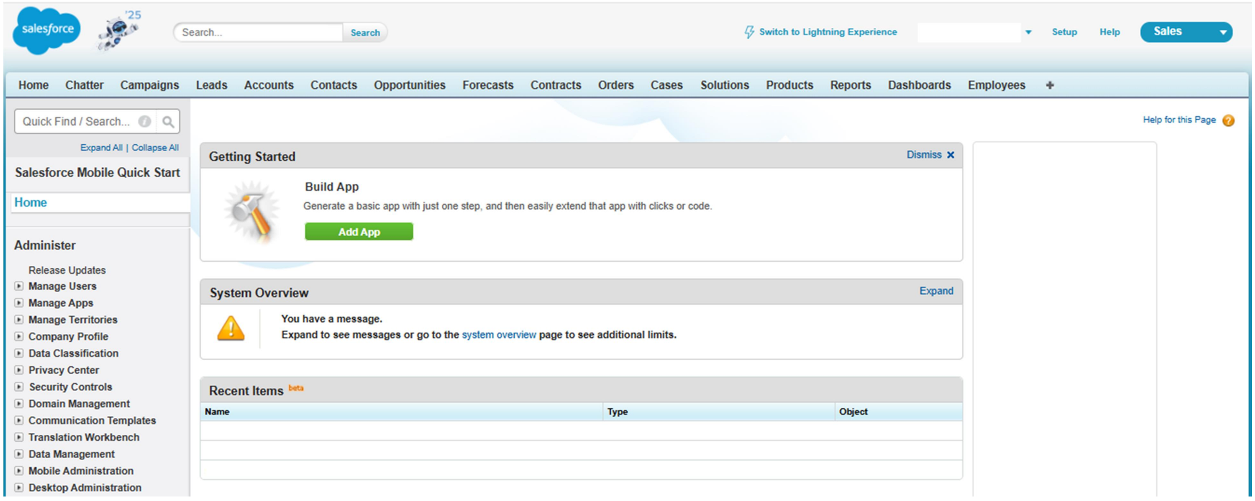


Fig 3.1 - **Salesforce Classic UI**

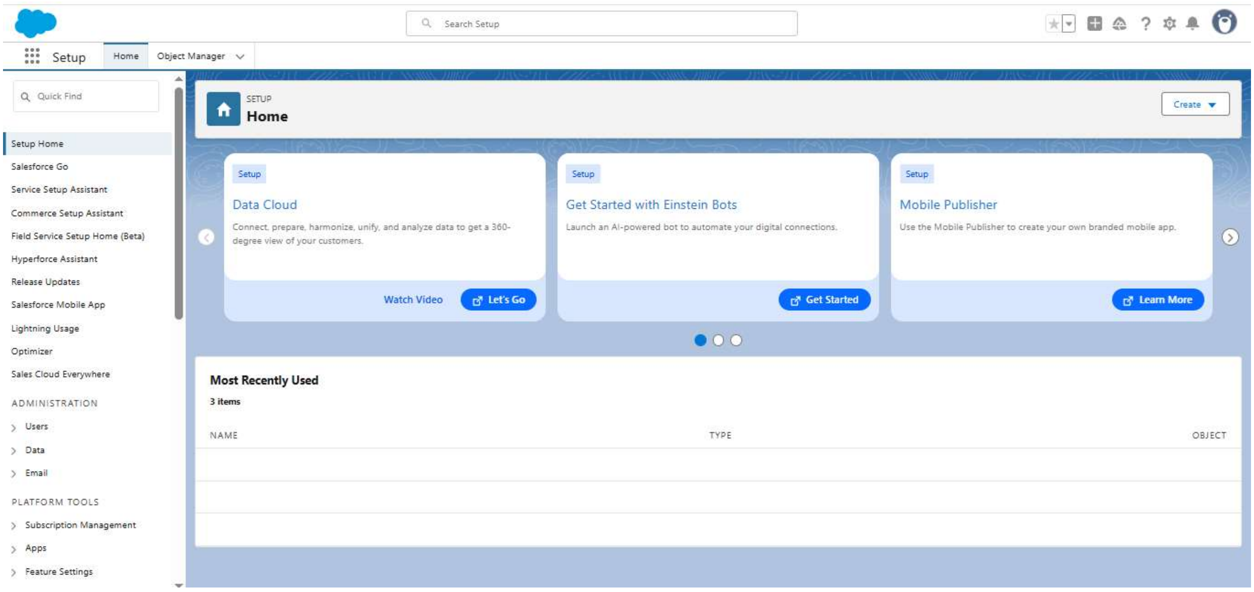


Fig 3.2 - **Lightning Experience UI**

3.1.1 Lightning Experience customization

Interface Density Settings

It defines how the user interface should looks like. It manages the padding between the fields.

Navigation: Setup > user interface > density settings > comfy or compact

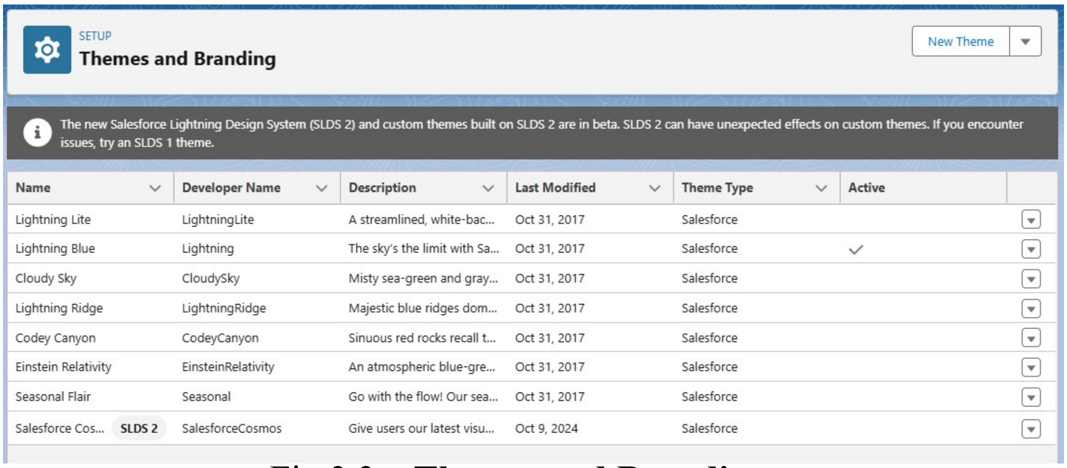
Navigation Bar Customization

By clicking the edit option, it is possible to drag and drop the object in which hierarchy it should be placed. Not only this, possible to add other objects too like activation target and assets.

Themes and Branding

Navigation: Themes and branding > New theme or activate the custom theme.

For new theme credentials like Theme name, API name, Brand image etc., need to be added.


SETUP
Themes and Branding
New Theme
The new Salesforce Lightning Design System (SLDS 2) and custom themes built on SLDS 2 are in beta. SLDS 2 can have unexpected effects on custom themes. If you encounter issues, try an SLDS 1 theme.

Name	Developer Name	Description	Last Modified	Theme Type	Active
Lightning Lite	LightningLite	A streamlined, white-bac...	Oct 31, 2017	Salesforce	
Lightning Blue	Lightning	The sky's the limit with Sa...	Oct 31, 2017	Salesforce	✓
Cloudy Sky	CloudySky	Misty sea-green and gray...	Oct 31, 2017	Salesforce	
Lightning Ridge	LightningRidge	Majestic blue ridges dom...	Oct 31, 2017	Salesforce	
Codey Canyon	CodeyCanyon	Sinuous red rocks recall t...	Oct 31, 2017	Salesforce	
Einstein Relativity	EinsteinRelativity	An atmospheric blue-gre...	Oct 31, 2017	Salesforce	
Seasonal Flair	Seasonal	Go with the flow! Our sea...	Oct 31, 2017	Salesforce	
Salesforce Cos... SLDS 2	SalesforceCosmos	Give users our latest visu...	Oct 9, 2024	Salesforce	

Fig 3.3 – **Themes and Branding**

Lightning Extension

Navigation: Extension > Lightning Extension > Download the chrome extension. It is meant only for chrome. It is disabled in other browsers like Firefox, edge and so on. It helps to enable the dark mode, hover over the link directly.

Status: Beta (which means under development and testing).

3.1.2 Salesforce classic customization

Tab customization

The Salesforce classic allows the user to customize the tab by add and remove buttons after selecting the custom app option.

Navigation: Name > My settings > Display and layout > Select the app > Add or remove the tabs.

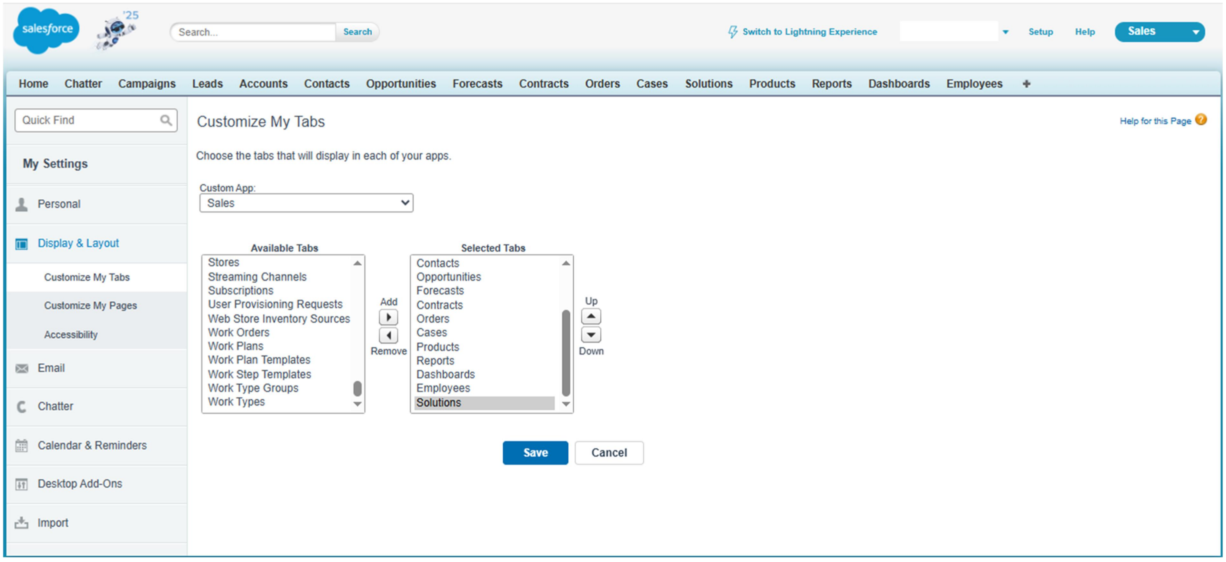


Fig 3.4 – **Tab Customization**

Page customization

This allows the user to disable some of the list in the page.

Navigation: Settings > Customize my pages > Select the page need to be customized > Customize page > Add or remove > Save.

3.2 Object

The fundamental terminology used in the Salesforce CRM which refers to a table in the database which stores the data in rows (Records) and columns (Fields). There are two types of objects:

1) Standard object
2) Custom object.

3.2.1 Standard objects

These are the standard and built in objects in Salesforce.

Object	Description
Lead	A customer shown keen interest but not yet satisfied.
Contact	A person or company information.
Account	Company or organization with which business is done.
Opportunity	A potential revenue generating deal.
Campaign	An effort to attract the leads.
Chatter	A tool used to effectively communicate with Salesforce to post update and share files.
Case	Issue or service requests by a customer need to be resolved.
Contract	Legal agreement between company and account.
Order	Confirmed deal for product or services.
Forecast	Estimates the future revenue.

3.2.2 Custom objects

User defined tools developed by admin or developer when the existing data can't be fit into the standard objects. The custom object name should always be denoted in the ending by double underscore c (__c).

Object	Description
Student_Name__c	Stores the student names.
D_O_B__c	Stores students date of birth.
ID__c	Stores the ID Nos. of the student.

Navigation in lightning experience: Setup > Object manager > Create > Custom object

Navigation in Salesforce classic: Setup > Build > Create > Manage your custom apps > New custom object.

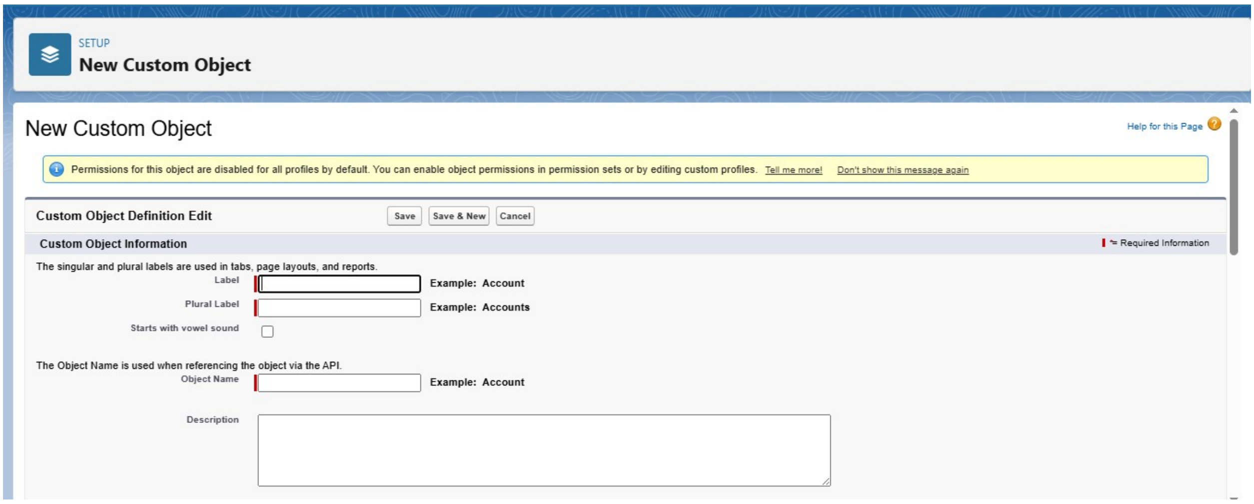


Fig 3.5 - **Custom object creation**

3.2.3 Fields and Relationships

Once after the creation of custom objects, tab customization should be done. Once over, move to field creation of object which stores the record.

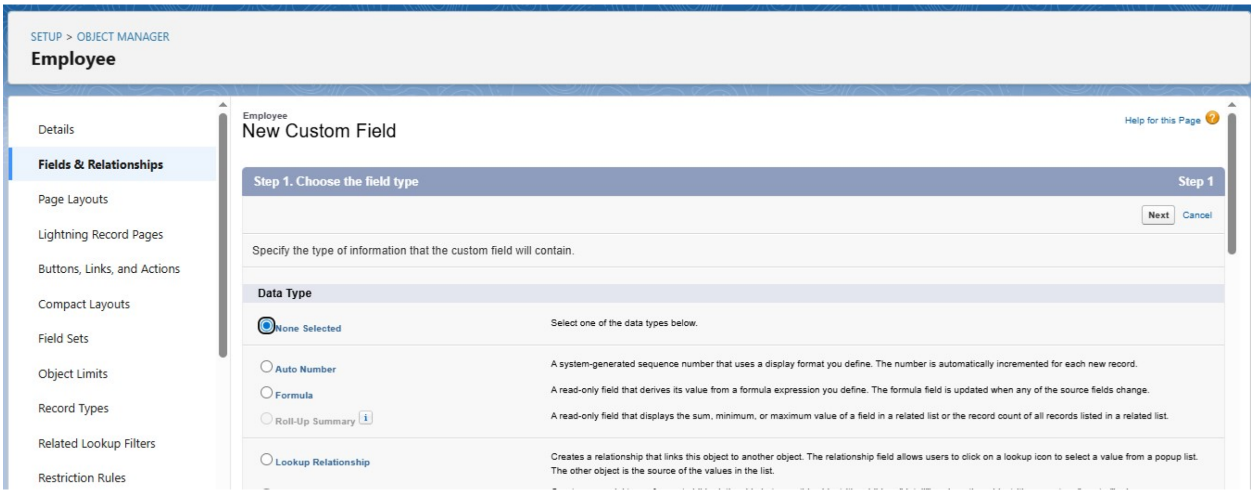


Fig 3.6 - **Custom Field**

Select the data type (text, date, currency and so on) or the relationships like look up relationship, master-detail relationship, external lookup relationship.

- Look up relationship: Create a link between two objects.
- Master-detail relationship: It links the objects in the manner of parent and child.
- External lookup relationship: It links the object which is external to the Salesforce org.

From which object is linking it to another will be the child object and the linked object will be parent object.

3.2.4 Field Dependencies

Field Dependencies allow you to control the drop-down (picklist).

Navigation (to setup picklist): Setup > Object manager > New > Picklist > Enter the fields for the picklist > Set field security > Add to page layout > Save.

Navigation (Apply Field dependencies): Object manager > Field dependencies > Enter controlling and dependent fields > Define dependency matrix > Save.

3.2.5 Roll up summary field

Aggregates values from a child object's field and displays the result in the parent (master) object's field**.**

It does: Sum, Count, min, max

3.2.6 Record types

Record types allow different layout, picklist and business process to show to different users in the Salesforce org with same objects.

Navigation: Setup > Object manager > Choose the specific object > Left label > Record types > New > step1: Enter the details > Step 2: Assign page layout

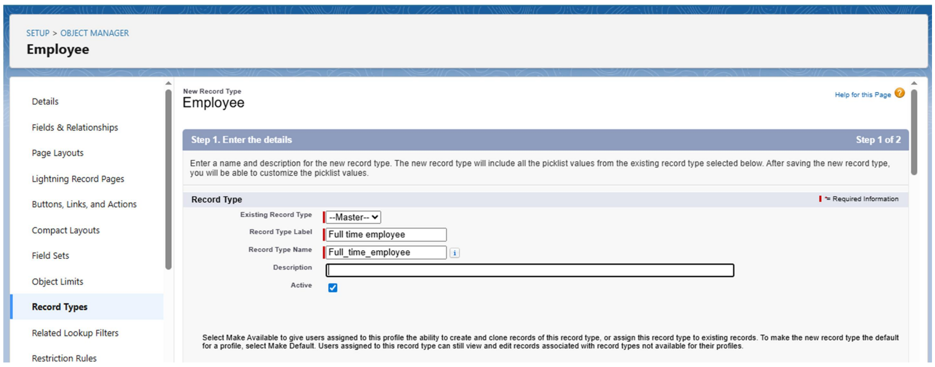


Fig 3.7 - **Step1**

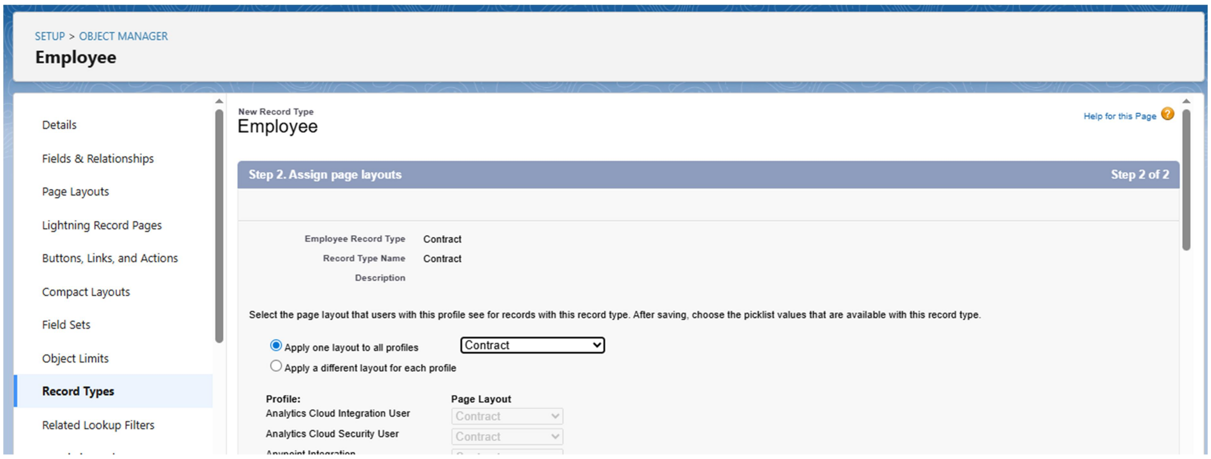


Fig 3.8 - **Step2**

3.3 Company information and settings

Company settings includes: Company information, fiscal years, business hours, holidays, language setup and data protection & privacy.

Allows the user to setup the above mentioned settings manually according to the business.

Navigation: Setup > Company settings > Company information / fiscal year/ business hours / holidays / language setup / data protection & privacy.

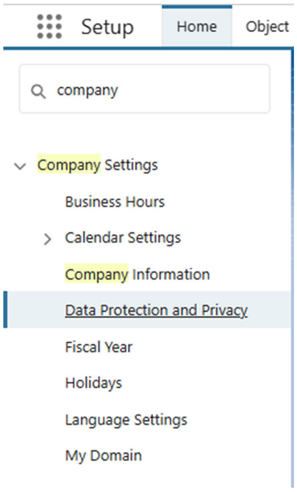


Fig 3.9 – **Company information and settings**

3.4 User Management

User management in the Salesforce facilitates who can log in, what they can see, what they can do inside. While creating the profile for an user, their roles should be mentioned accordingly they will be having the permission to the Salesforce Org.

Things can be done: Creating a user, Choosing the profile, Permission sets, Feature Licenses, Freezing or un-freezing the accounts, Disabling the users, Viewing of login history, Unlocking the users, Reset passwords

3.5 Salesforce Clouds

Salesforce provides different modules as cloud. The different types of cloud are:

S.No	Cloud	Uses
1.	Sales cloud	It helps in improving the sales of the company and closes the key deals faster.
2.	Service cloud	It is meant only for fast customer support by the company.
3.	Marketing cloud	Helps in branding the company’s product through SMS, stalls and so on.
4.	Commerce cloud	For retail business.
5.	Experience cloud	For customer and the communities.
6.	Analytics cloud	For analysis through tableau.
7.	Financial services cloud	For banks, and financial sector organizations.
8.	Health cloud	For hospital, clinics and so on.
9.	Nonprofit cloud	For fund raising organizations.
10.	Education cloud	For educational structural entities.
11.	Manufacturing cloud	For manufacturing and supply chain.
12.	Revenue cloud	For billing and subscription management.
13.	Stack integration cloud	Connects Salesforce to slack (Message app).

4. Features and functionalities

4.1 sandboxes

A Sandbox is a replica of your Salesforce org used to test, develop, and train — without affecting real data. Types of sandboxes are : 1) Developer 2)Developer pro 3)Partial copy 4)Full

Difference between the sandboxes

Features	Developer	Developer Pro	Partial copy	Full
Refresh interval	1 day	1 day	5 days	29 days
Capacity	200 MB	1 GB	5 GB	Same as source
Included	Configuration, apps & metadata, all users.	Configuration, apps & metadata, all users.	Configuration, apps & metadata, all users, sandbox template support, records.	Configuration, apps & metadata, all users, sandbox template support, records, history and chatter data.
Use	Development / Testing	Development / Testing with large data sets	User acceptance testing, integration testing, training.	Performance and load test in, staging.

Once the sandbox testing is successful, the metadata is transferred to the production Salesforce org using Change Sets.

Flow: Sandbox > Outbound Change Set > Inbound Change Set > Deploy to Production.

4.2 Schema Builder

Schema Builder is a visual tool that helps you view, create, and manage the structure of your data model (called schema) in Salesforce — using a drag-and-drop interface**.**

Navigation (For standard object): Setup > Schema builder > object > Quick find > Select the objects.

Navigation (For custom object): Setup > Object manager > create > Custom object > Fill the details > Save and next > Setup > Schema builder > object > Quick find > Select the objects.

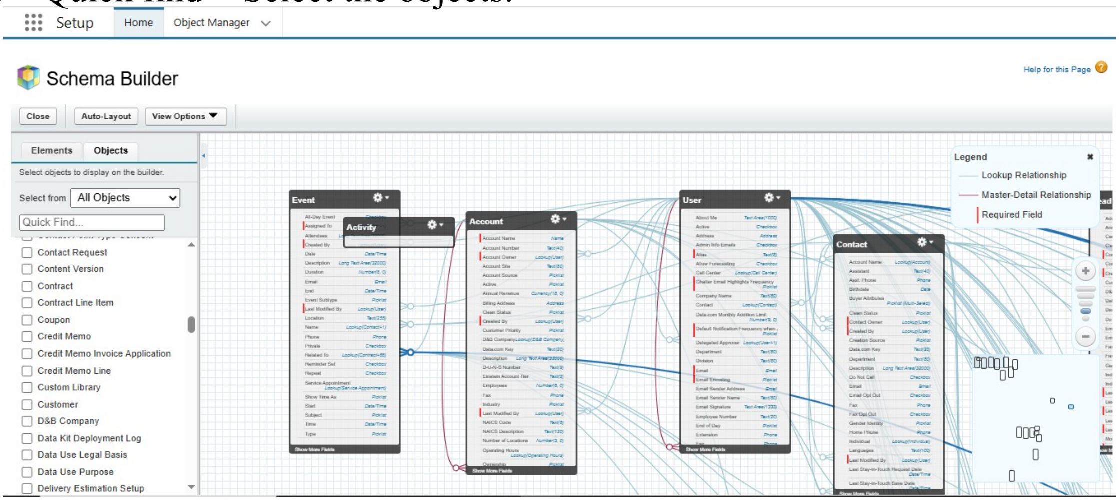


Fig 4.1 **- Schema Builder**

4.3 Custom app builder

Steps:

1) Navigate to app manager
   Navigation: Setup > App manager

2) Create new lightning app

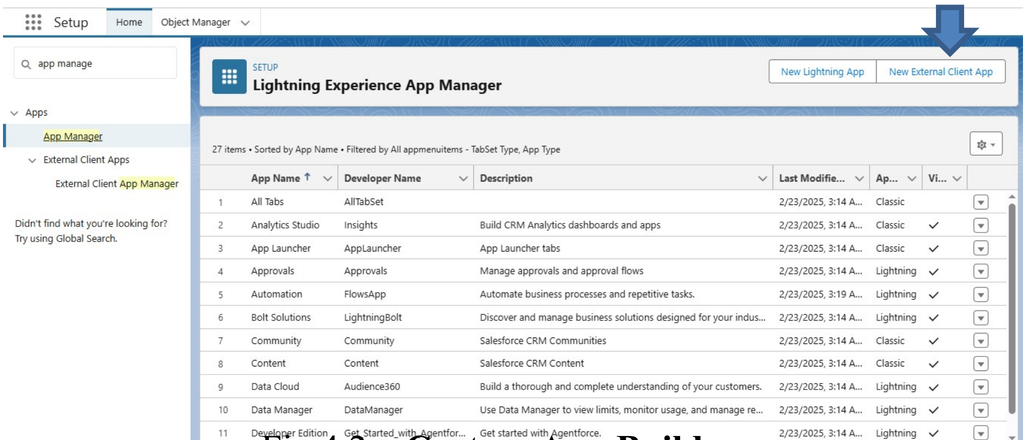


Fig 4.2 – **Custom App Builder**

3) Choose options
4) Add utility items
5) Add navigation items (objects)
6) Assign user profile

4.4 Process Automation

Using the tools the Salesforce org can be automated for specify functionalities like sending emails, updating records and so on.

Tools: 1) WorkFlow automation 2) process builder 3) Flow automation and 4) Code automation.

Tool	Code	Uses
WorkFlow Automation	No code	To send email and update the field
Process builder	No code	To send email, update field, update and create record, post to chatter
Flow automation	No code	To send email, create and update record, outbound messages (send message to external systems)
Code automation	Code needed	Create and update records, access external systems

4.4.1 WorkFlow Rules

These are the rules or protocols which lets the entity to triggers an action when an certain task occurs. The actions can be:

1) Task – Assign an task for the user.
2) Email alerts – Send the email's automatically to the user.
3) Field update – Automatically changes value of the field
4) Outbound messages – Send the information to the other or external system. There are two types of workFlow actions : 1) Immediate workFlow action (Action takes place once the entity met the rule) and 2) Time-Dependent workFlow action (Happens after some time when it met the rules).

Navigation: Setup > WorkFlow rules > New rule > Step1: select the object > Step2: Configure work Flow rule > Step3: Specify work Flow actions.

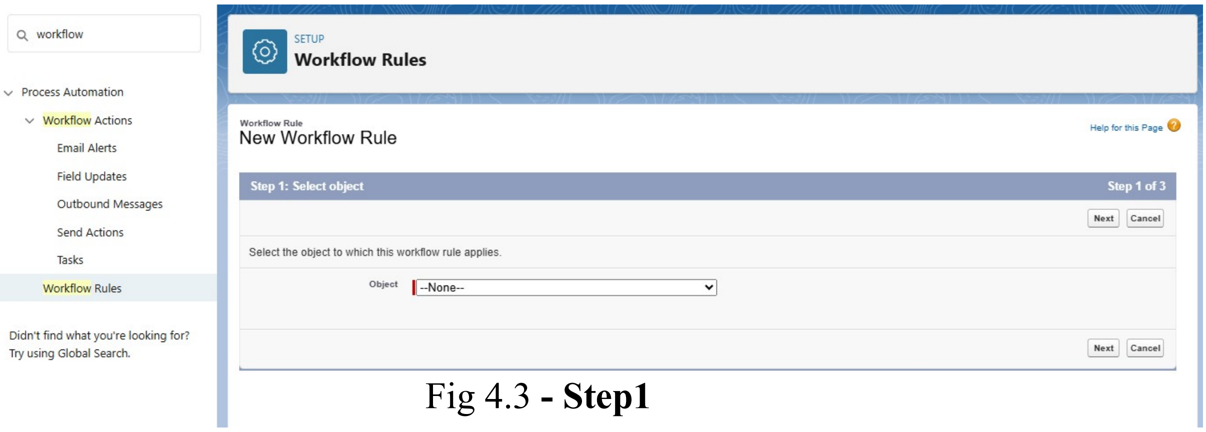


Fig 4.3 - **Step1**

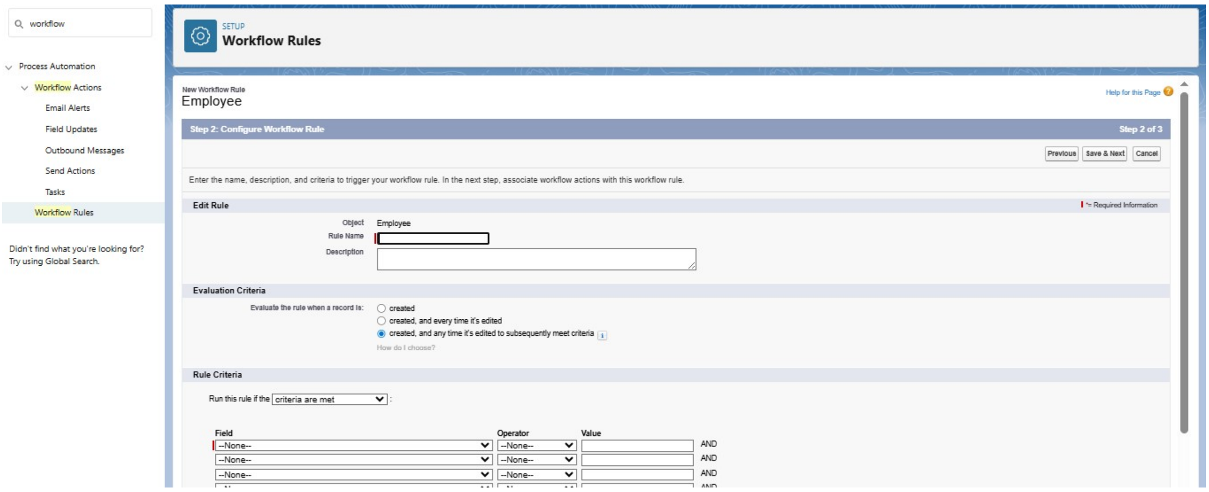


Fig 4.4 - **Step2**

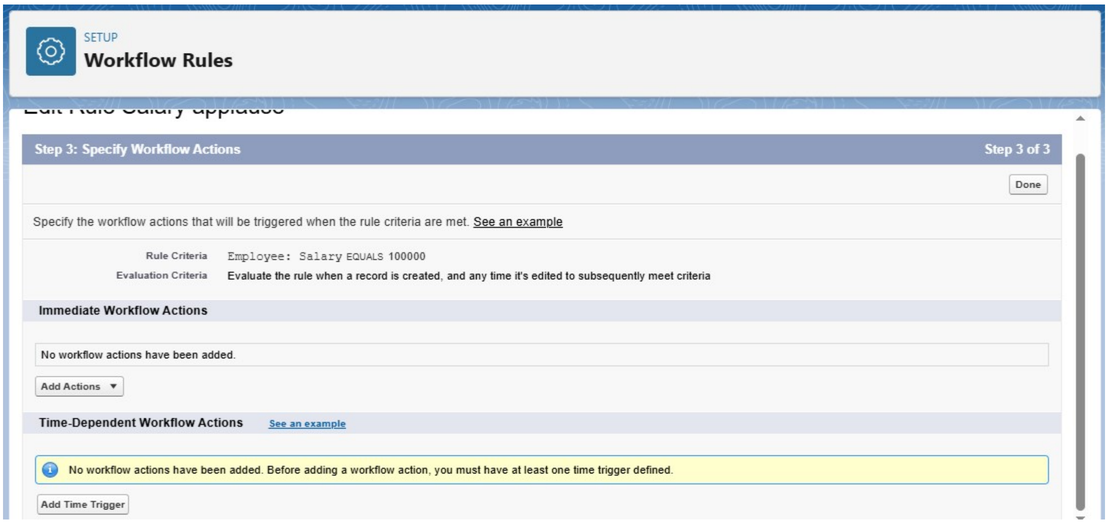


Fig 4.5 - **Step3**

4.4.2 Email Templates

Email template provides a template for the user for email alerts with defined email body, which can be used in loop whenever needed.

4.4.3 Validation rules

It allows to automatically pops the message that the record entered is incorrect.

Navigation: Setup > Object manager > Select the object > Validation rules > New > Validation rule > Save.

Fig 4.6 – **Validation Rules**

4.4.4 Process Builder

One of the process automation tool which allows a drag and drop option to build the process to triggers an action. The actions are : Creating and updating records, post to chatter (messaging platform for internal communication), sending mails.

Navigation: Setup > Process Builder > New > Enter credentials for new process > Process builder (Drag and drop) > Select and define the action.

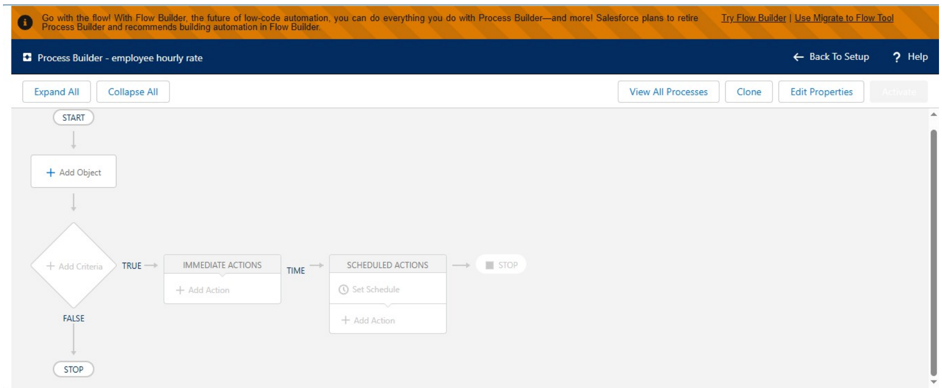


Fig 4.7 – **Process Builder**

4.4.5 Flow Automation

The Flow automation allows the user to automatically create a record, delete the record and send emails. The Flow types are: screen Flow, scheduled triggered Flow, record-triggered Flow, Auto-launched triggered Flow, platform-event triggered Flow.

Navigation: Setup > Flows > New > Choose the types of Flows > Create the Flow.

S.No	Type	Use
1.	Screen Flow	Pop a screen when the condition is met.
2.	Scheduled-triggered Flow	Trigger the action at the time of schedule.
3.	Record-triggered Flow	Trigger a record when the conditions are met.
4.	Platform event-triggered Flow	Trigger an action when an event is occurred.
5.	Auto-launched trigger	When the condition is met, the action takes in the back-end side.

4.5 Salesforce Security

Salesforce provides multi-layer security namely organisational level security, object level security, field level security and record level security.

Organisational level security
Object level security
Field level security
Record level security

Fig 4.8 – **Salesforce Security**

4.5.1 Organizational level security

The organizational level security helps in setting up password policies, login hours and so on.

Navigation: Setup > Profile > Select the profile (Edit) > Make change > Save.

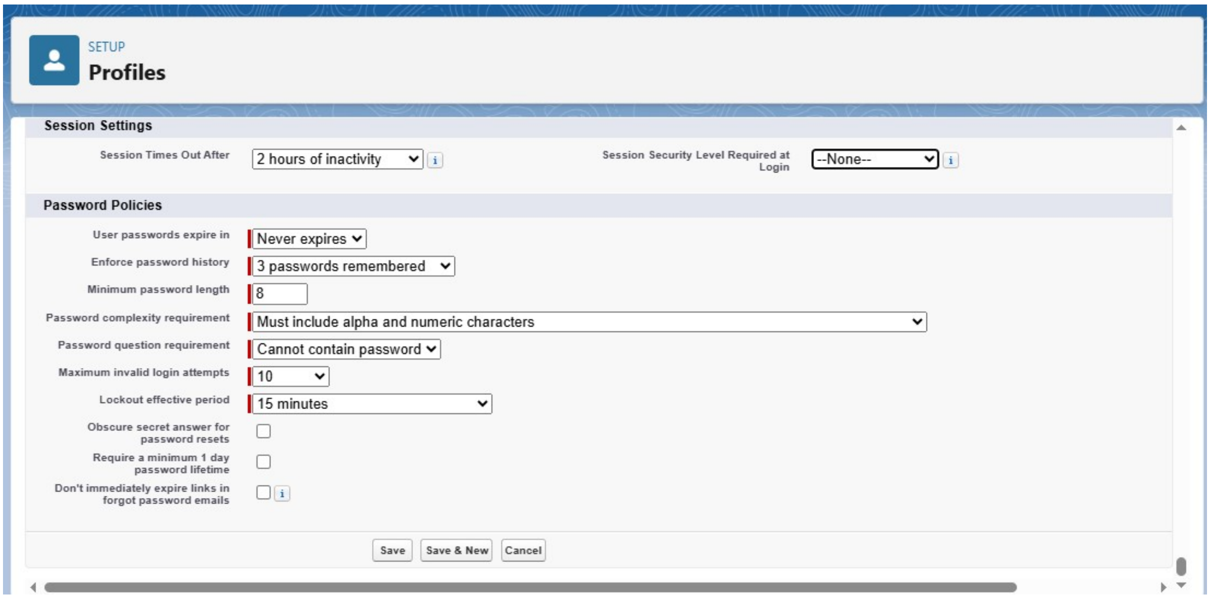


Fig 4.9 - **Session and password settings**

4.5.2 Object level security

It helps in who can access the objects by which profile. The objects can be both standard and custom.

Navigation: Setup > Profile > Select the profile > Standard or custom object permission > remove the tick for the non-visibility for the profile.

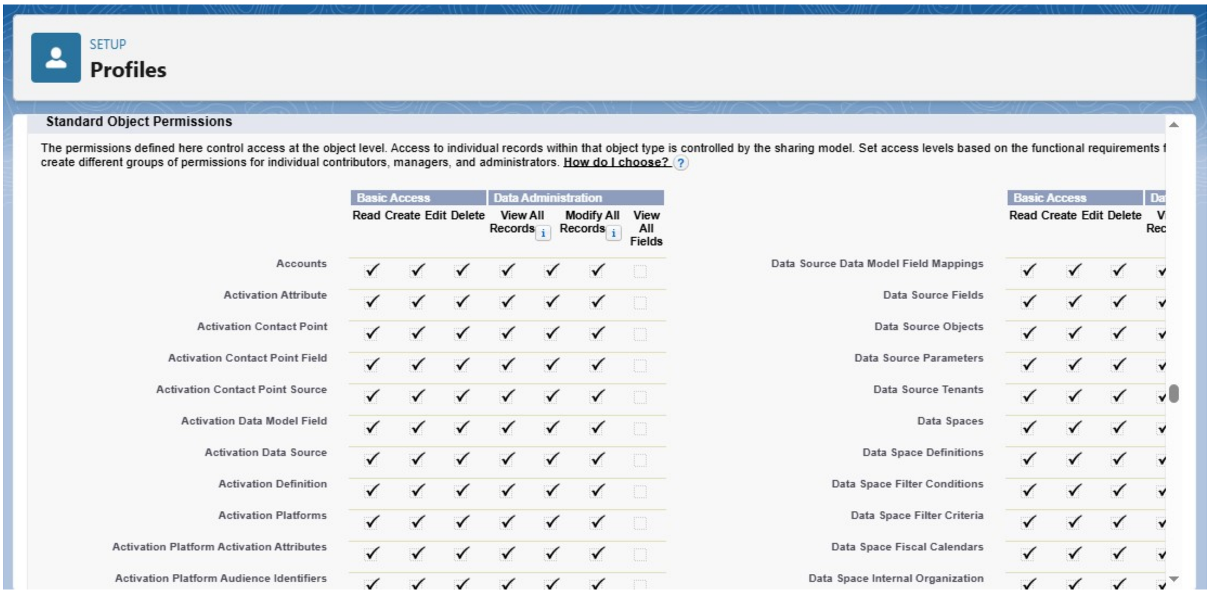


Fig 4.10 - **Standard object permission**

4.5.3 Field level security

It helps in which profile can access the fields of the object in the Salesforce org.

Navigation: Setup > Object manager > Select the object > Field and Relationships > Select the field label > Select the option set field-level security > Save.

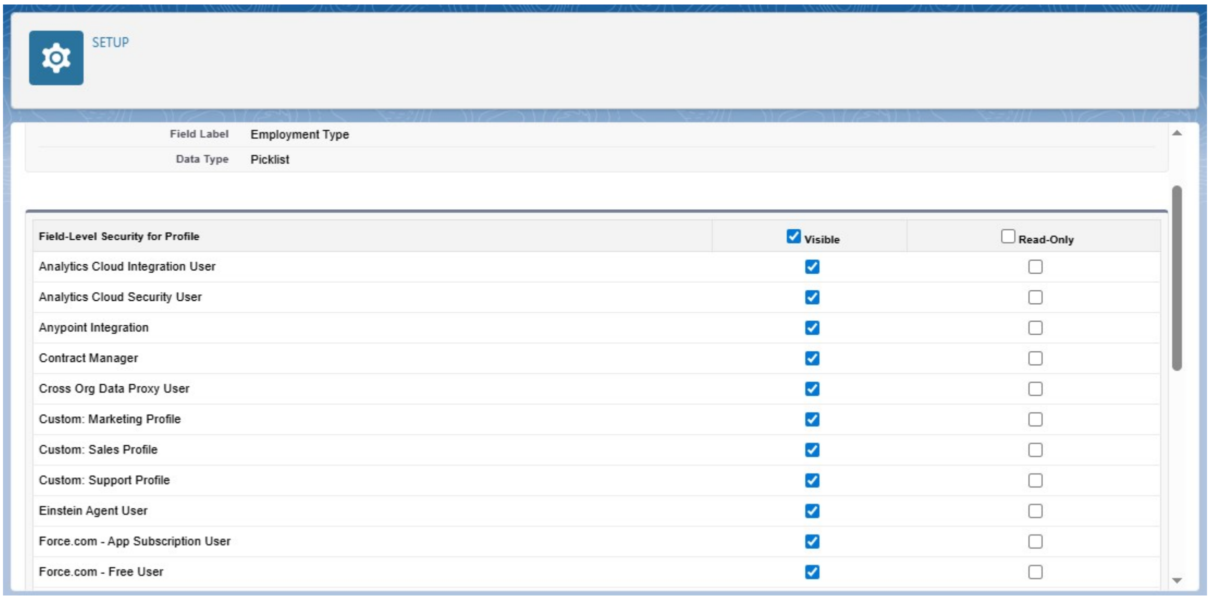


Fig 4.11 - **Profiles for field level security**

4.5.4 Record level security

The record level security is all about sharing the records between the profiles in the Salesforce org through: Organisation wide defaults, role hierarchy, sharing rules, manual sharing.

4.6 Analytics management

Analytics allows the stakeholders to get meaningful insights from the data or record in a specific object by building an report with visualization.

Types of record: 1) Tabular 2) Summary 3) Matrix

Navigation: App Launcher > Select the appropriate app (for instance sales) > click reports tab > New report > Select the type name (object) > Start report > Add the fields for report > Follow the necessary steps for the report > Run and Save.

4.6.1 Tabular Report

Tabular report allows the user to view the report in the form of table or spreadsheet. It doesn't have the feature of grouping the records and visualizing. But the filter can be done by the filter option on the left corner of the interface.

Once after the creation of tabular report it can be stored in public or private folder where, in public folder the users who uses the Salesforce org can view the report by clicking the public folder whereas private cannot. It can be only viewed by the creator

4.6.2 Summary Report

Once after creating the report in the tabular or spread sheet form, using the group option under the outline (left corner of the report interface) the report can be drifted to summary report or else by clicking the group by in field tab (max of 3 allowed).

Add Chart will be available after immediate creation of summary report. It allows visualizing the record.

4.6.3 Bucket Fields

The bucket field allows to group or cluster the record in the fields. For instance in the country fields there are records like USA, UK, America. Where needed to cluster the USA and America, so it can be done by using the bucket fields. Once it is inserted into bucket fields the reports cluster them.

4.6.4 Report types

The report types allow the object that are interlinked with the fields and display the merged records in the interface.

These objects are linked through the fields and relationships' which is been seen above in sec 3.2.3. The relationships are Look up relationship, Master-detail relationship, External lookup relationship

Navigation: Setup > Report types > New custom report type > Step1: define the custom report type > Step2: Define reports record sets > Save.

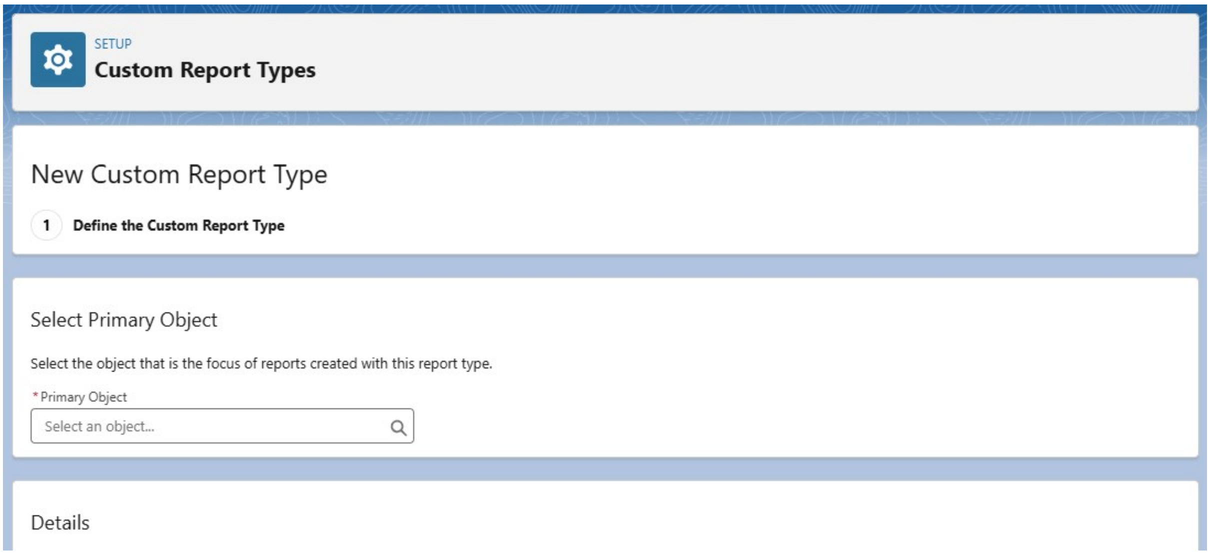


Fig 4.12 - **Step1**

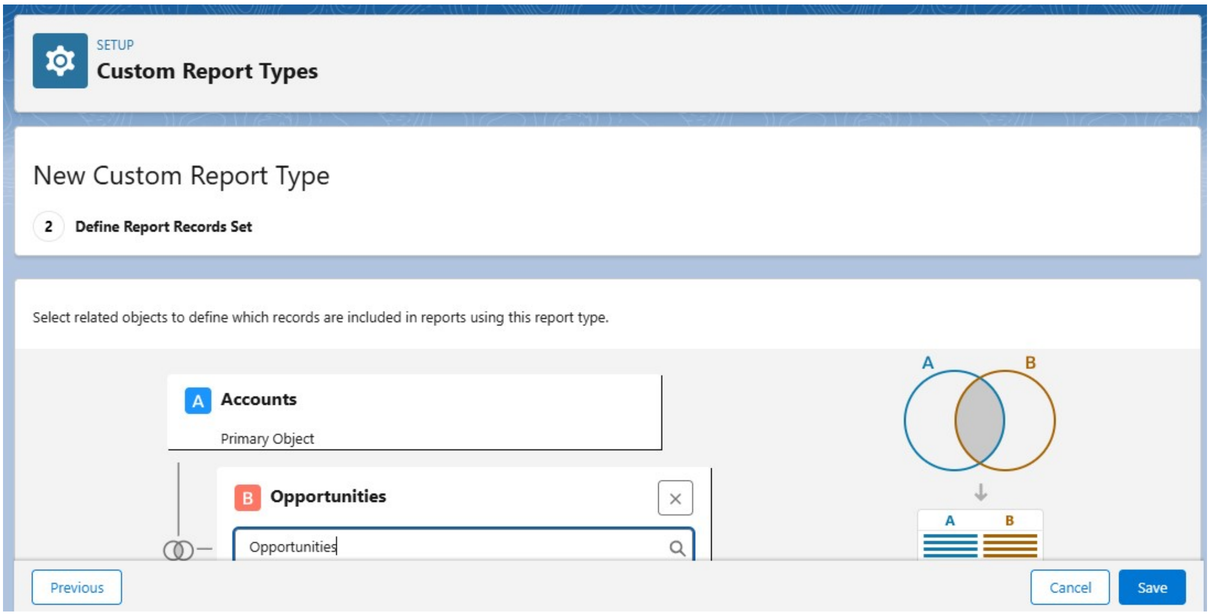


Fig 4.13 - **Step 2**

4.7 Data Management

The data management is all about handling and organising the data for the CRM process. It includes data import: import wizard, data loader and data loader.io, mass delete records, duplicate management, data export, storage usage, and field history tracking.

4.7.1 Duplicate Management

Duplicate management facilitates duplicate rules, matching rules and duplicate error logs.

Duplicate rules: The set of rules which does not allows the duplicate records from the Salesforce org. It is done when the record or data already exist. In simple words, it just alerts.

Matching rules: The set of rules which instruct the Salesforce org how to identify the duplicate records.

Duplicate error logs: It contains the logs when the duplicate record tries to log in to the Salesforce org.

4.7.2 Data Import

	Import Wizard	**Data Loader**	**Data loader.iO**
No.of. records can be imported	50,000	5 million	100mb
Duplicates	No duplicates while importing	Have duplicates	Have duplicates
Backup	No	Backup available	Backup available

4.8 Sales and Marketing Applications

For the sales application primary action is lead generation. The lead refers to the potential customer who is willing to buy the product from the company. The lead can come from emails, website, events, social media, pardot (B2B marketing automation tool) and from marketing cloud.

Once the lead ok with the product means lead (potential customer) customer becomes the part of the company (by buying the products), the lead is converted to account, contact and opportunity.

Campaign tracks from where the lead is generated and is the lead is scored or not.

So, if a lead had entered his credentials from a web of you company, then how to redirect to your Salesforce lead object? Here, the Salesforce facilitates a features “Web to lead” where by implying this feature into Salesforce lets the company to get data of the lead directly to the Salesforce org.

Navigation: Setup > web to lead > Click create ne web to lead form > Fill the web-to-lead setup.

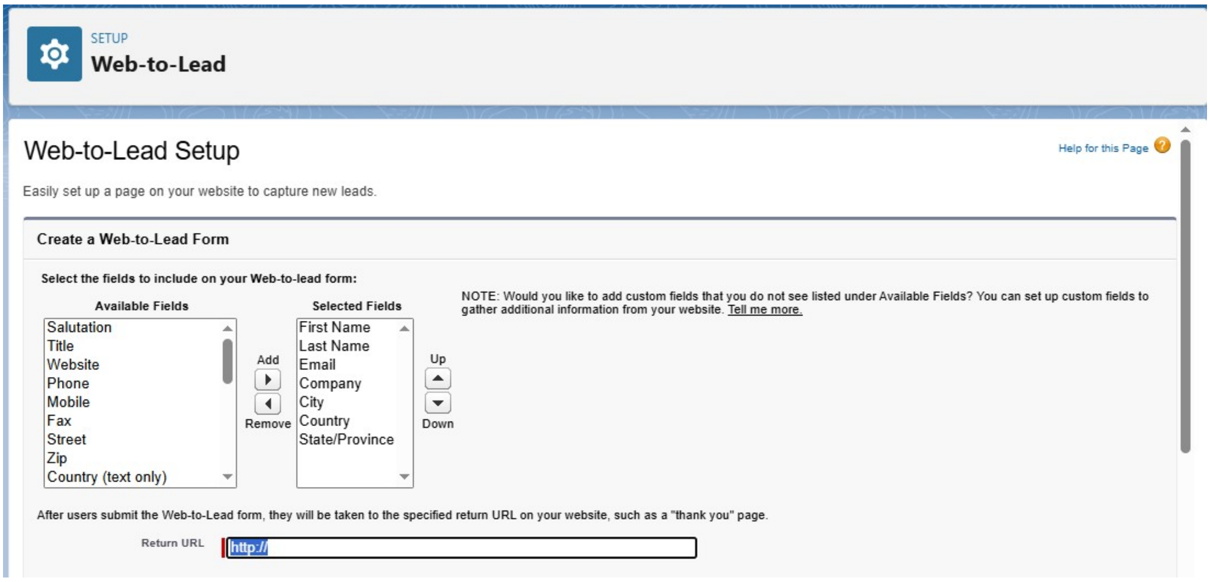


Fig 4.14 – **Web to Lead**

The term “Lead scoring” refers to the scoring or ranking the lead by giving scores to them in the Salesforce org by creating a custom field.

For instance if the company or organisation need to response to the lead, it could be done in automated way by setting the email template through the lead-auto response rules.

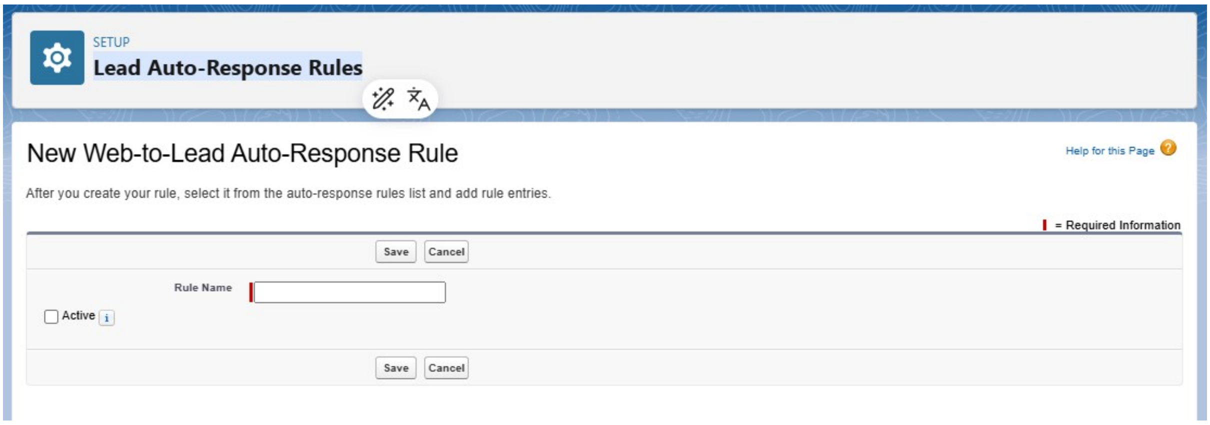


Fig 4.15 – **Lead Auto Response Tool**

In an certain criteria if the lead should be assigned to the particular peer or Queue of people, it could be done through- the lead assignment rules in the setup.

The opportunity object lets the user to forecast the revenue, report and analyse, track the sales pipeline.

4.9 Service and Support application

The case object used to manage the customer issues of the respective company's product. While creating a new case contact name, account name and priority need to be decided. To notify the contact that case has been created then check box should be filled (send notification email to contact).

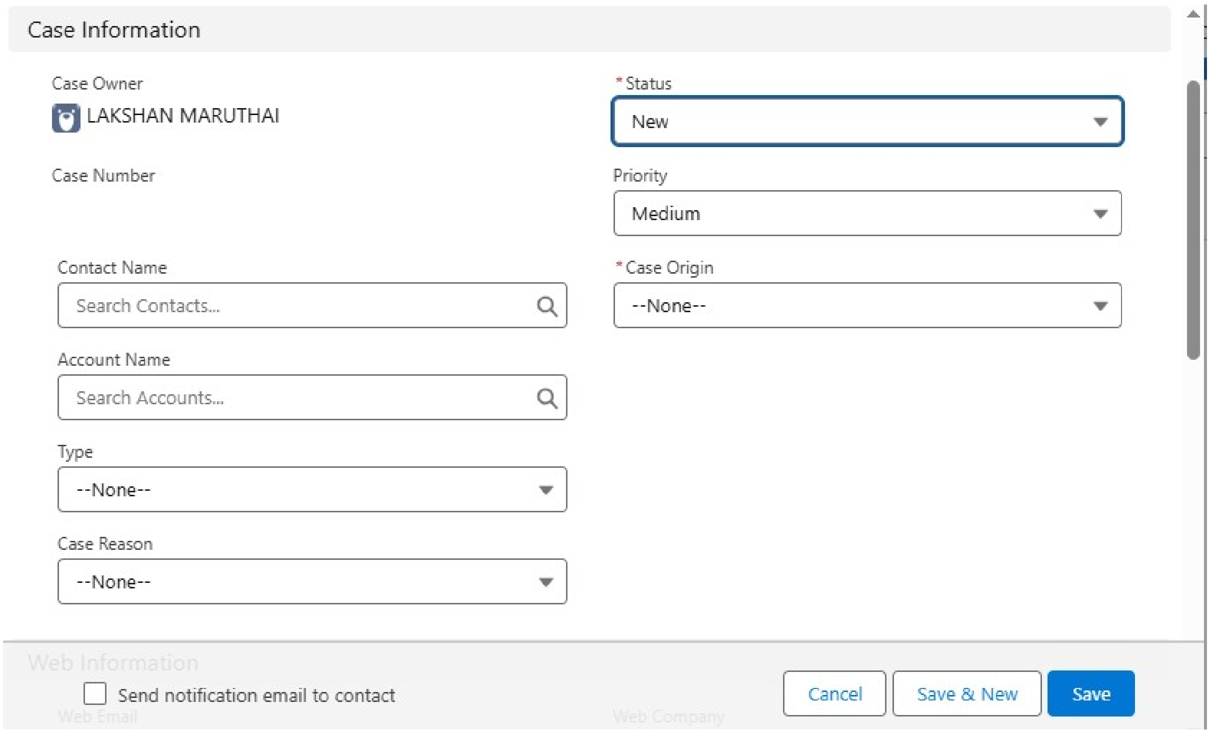


Fig 4.16 – **Case Information**

If an email is sent to the company or an organisation, to automate to create a case object can be done by email to case feature.

Navigation: Setup > Case > Email to case > Edit > possible to select two options 1) on-demand email to case 2) Email to case with agent > Select the routing address > Save.

Once in the routing address if the email address is given then the verification link will be send to the entered email, once verified Salesforce delivers an email address. That should be forwarded manually.

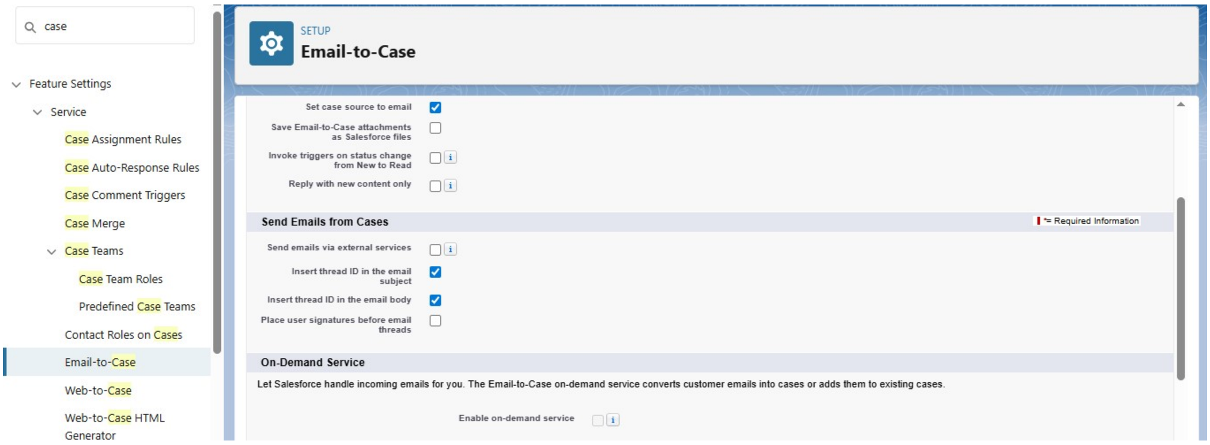


Fig 4.17 – **Email to Case**

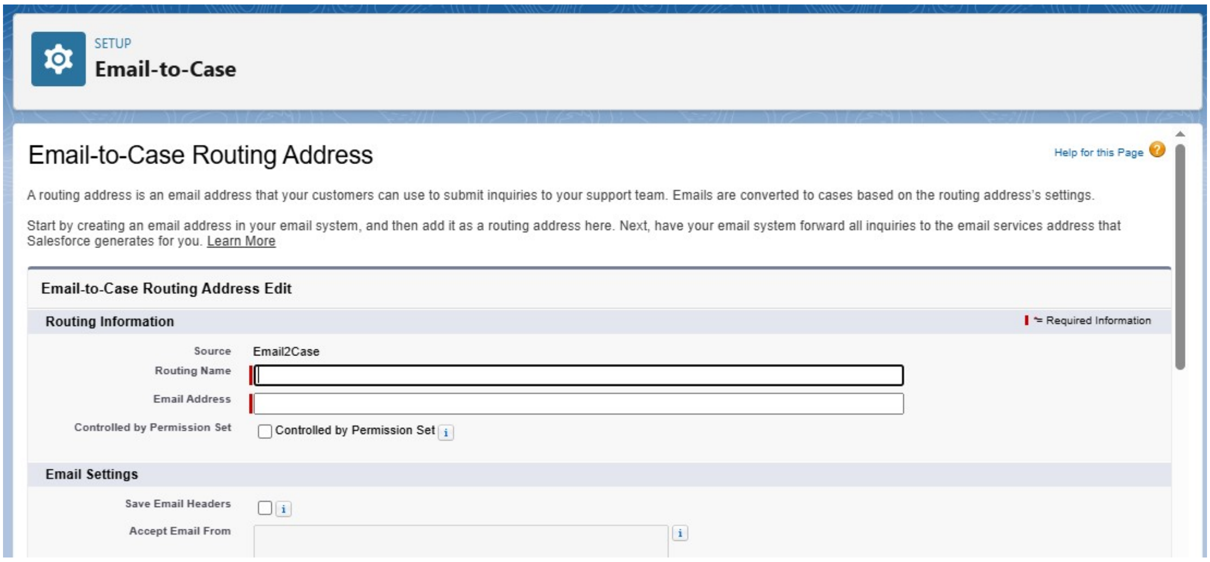


Fig 4.18 – **Email to Case**

Same as well if an customer fills the form, then the case should be created. It can be done by the feature called as "Web-to-case".

Navigation: Setup > Web-to-case > Fill the credentials > Save.

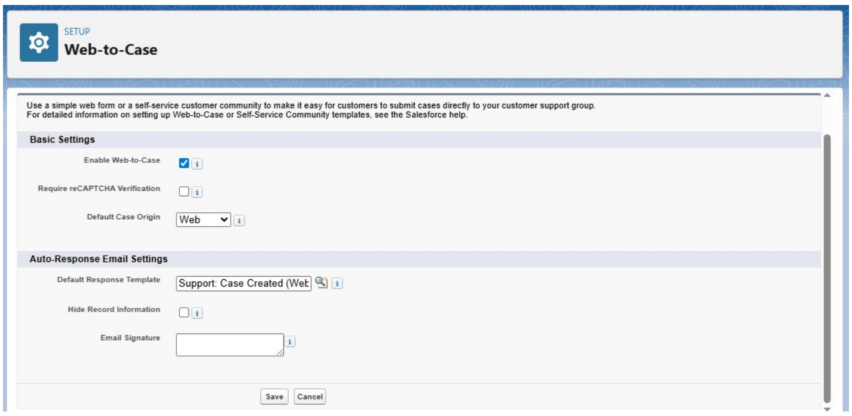


Fig 4.19 – **Web to Case**

5. Benefits

- Total customer data at one place.
- Safe and secure since it uses cloud (SaaS).
- Improves the sales pipeline.
- Tracks the leads and successfully convert them into account, opportunity and contact.
- The Salesforce application can be embedded into tablet or even phone, which makes it user friendly.
- Can generate daily reports and dashboards.

6. Challenges and Limitations

- Complex for small enterprises.
- Cost of Salesforce full features is high.
- Customization and setup is hard.
- Tough to learn the configuration and tabs.
- Less storage in basic plans like Salesforce Essentials (10 users, 25Dollar per month), Salesforce Starter (10 users , 25 dollars per month), Sales cloud professional (Workflow automation available and unlimited users).

7. Comparison with other CRM's

Features	Salesforce CRM	Microsoft dynamics 360	Oracle CRM
Platform	Cloud	Cloud	Partially
AI	Einstein	Co-pilot	Oracle adaptive intelligence
Third party integration	Strong (slack, google, etc.)	Good with MS apps	Less open
Industry	Health, finance, retail and so on	Combined of both ERP and CRM	Both ERP and CRM
Suitable	Large enterprises	Enterprise using Microsoft	Large enterprises
Market share	23%	5.7%	4%
Automation	Yes	Yes	Complex automation
Mobile Application	Yes	Yes	Yes
Customization	Highly customizable	Less compared to Salesforce	Less compared to Microsoft dynamics 360

8. Conclusion

The Salesforce CRM from the day of development it’s had countered many customization and integration of technologies. By which it is the renowned number 1 CRM ahead of big tech CRM’s like Microsoft and Oracle. Furthermore it’s AI Einstein and mule soft adds a big pillar to its organization. Because of the advancement the 500 fortune companies integrated Salesforce CRM with them. In simple phrase it is the seed for the CRM (Customer Relationship Management) department.