



How to Customize **Salesforce**



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· INTRODUCTION ·

Salesforce is one of the most popular CRM in the world. The constant slew of the latest features and functionality, combined with the ability of the suite to deliver a highly customized experience to end users means the suite always offers exactly what marketers look forward to drive highly powerful campaigns. Salesforce offers a comprehensive set of features and functionality, with the user able to pick and choose what they want easily, without writing code.

THE ARCHITECTURE OF THE SALESFORCE.COM PLATFORM

- ❖ One of Salesforce's inherent strengths is its robust platform architecture. Salesforce adopts a layered approach to the platform architecture, and thrives on multi-tenancy.
- ❖ The Salesforce platform is comprised of different components such as data services, artificial intelligence, and robust APIs for development. Custom apps build using the platform is at the top layer of the platform. Prebuilt offerings such as Sales Cloud and Marketing Cloud constitute the next layer. Powerful multi-tenancy services such as Einstein Predictive Intelligence and the Lightning Framework for development are integrated into all apps and builds, giving these builds powerful, consistent functionality.
- ❖ Salesforce, being a cloud-based CRM, stores all data and resources in the multitenant cloud. Regardless of the size of the business, Salesforce users' gets access to the same computing power, data storage, and core features.
- ❖ A slew of APIs on offer not only enables seamless connection of the CRM with almost all popular third-party software, but also gives the Salesforce its renowned flexibility. When a user adds a custom object or field, the platform automatically creates an API name, which serves as an access point between the user org and the database. The underlying technology takes care of the specifics of how information passes throughout the system, with the user presented with the required data in a neat, clean interface.



SALESFORCE'S UNIQUE DATA MANAGEMENT PRACTICES

- ❖ Data is engine driving Salesforce instances. Today's business decisions rely heavily on data and metrics, and as such unman - aged or poor quality data can cost the business huge opportu - nities. For instance, duplicate customer records in the reports, or unreliable opportunities in the sales funnel cause severe distortions, leading to wasted efforts and lost opportunity.
- ❖ The basic requirement of effective data management is clean, accurate and complete account, lead, contact and customer data. Salesforce users may leverage the data quality assess - ment offered by data.com as an easy way to secure a visual representation of CRM data quality. Salesforce dupe manage - ment identifies existing duplicate records and pre-empts creation of duplicate records. Salesforce users may also set up a one-on-one consultation with a certified data specialist, who would undertake a thorough assessment of the incumbent data and make improvements to data quality based on industry best practices.
- ❖ A good dashboard is often the difference between realizing business goals and missing the mark. Determining key data related metrics and building useful dashboards based on such metrics enable users to assess the health of the sales, cam - paigns or whatever is being tracked, in a quick glance, even while on the go. For instance, sales teams consider key metrics such as time to close, opportunity pipe, forecast by rep, activi - ties by sales rep, win/loss rates, and more. Service teams constantly evaluate metrics such as time to case resolution, high severity case volume, top customers by open case, and more. Marketing teams require key metrics such as Leads by source or campaign, campaigns by region, campaign conver - sion funnel, top revenue-generating campaigns, and much more. Salesforce Accelerators offer experts who guide users through proven best practices for building and customizing reports and dashboards.
- ❖ Having ensured the accuracy and relevancy of the data, the next step is to build a 360-degree view of customer data. The com - petitive advantage of a business and marketing priorities depends largely on comprehensive data. Incomplete or disjointed data is a critical liability, for decision-making become faulty.
- ❖ Salesforce simplifies what has hitherto been a complex, costly endeavour. Salesforce's master data management brings data together in the cloud, managing customer profiles, combining a limitless number of entities such as products, price, locations, and relating them all together in powerful hierarchies and



affiliations. Customer Master Data Harmonization Accelerator helps users establish enterprise data management framework which allows them to use exactly the data they require, for the purpose they require, delivering optimal value.

DATA ANALYTICS IN SALESFORCE

- ❖ Salesforce backs up efficient data management with powerful data analytics capabilities, allowing businesses to build intuitive and insightful reports and dashboards on existing data.
- ❖ An IDC study estimates only about 1% of the world's data is ever analyzed for valuable insights, meaning most businesses waste valuable time and effort to extract useless raw data
- ❖ Successful analytics depends on effective technology and organizational support. Salesforce offers the best available predictive analytics tools, which enable users to mine through large swathes of data, and unearth latent relationships between causes and consequences, and make educated predictions.
- ❖ Salesforce offers AI-augmented data discovery and explanations, built on a secure and scalable cloud platform. Users may connect data from any source, including non-Salesforce data into the analytic engine, to gain comprehensive insights. Businesses may understand their consumers better, and predict their wants and needs with a high level of accuracy.



DATA SECURITY IN SALESFORCE

- ❖ A key USP of Salesforce is the robust security on offer. Salesforce offers a comprehensive and versatile data security model to secure information at different levels. Salesforce implements three-tiered security, at the object, field and record levels, securing access at all levels of data storage, and offering unprecedented flexibility as well. Object level permissions normally require creating custom profiles and adding permissions directly to that profile. Permission sets allow admins to offer special permissions to users already in a profile. Permission sets allow admins to grant access permission to a specific resource, such as Campaigns, to a single employee or a small set of users. Admins are also empowered to set field-level permissions, such as providing read and write permissions for individual fields or to keep a field hidden from specific users.

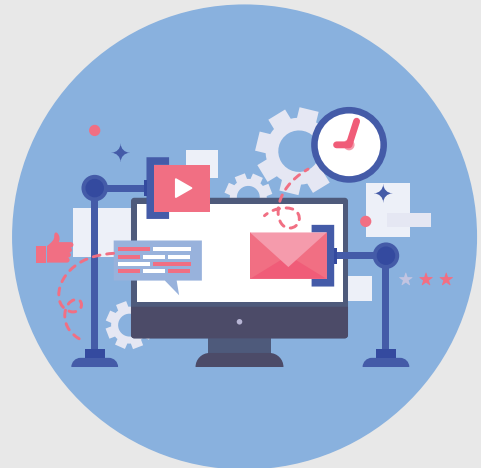


- ❖ Salesforce also provides sharing tools to secure access to data, depending on the business requirements.
- ❖ The trust site, trust.salesforce.com makes explicit performance data and gives insights to users on how their data is secured. Salesforce also offers information on any planned maintenance, which might impact access, through this site. Salesforce undertakes automatic upgrades three times a year. These changes reflect seamlessly on all accounts, without the users having to install new features or worry about whether the hardware will support the upgraded features.



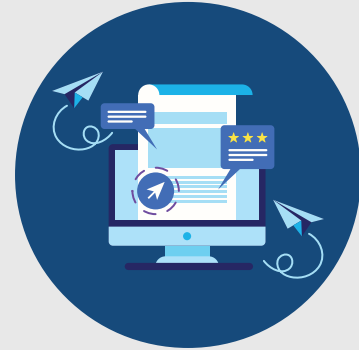
DATA AUTOMATION

- ❖ Data is growing at an exponential pace, with people across the world creating 2.5 exabytes of data – or equivalent to 90 years of HD video content every single day – the informational equivalent of 90 years of HD video.
- ❖ Today, the ability to manage huge swathes of data associated customers and clients, and drive insights from data sets out successful businesses from the also-rans. Smart businesses go in for large scale sales force automation (SFA) or using software for basic tasks such as order processing, contact management, information sharing, inventory monitoring, order tracking, sales forecast analysis, employee performance evaluation, and more. Such automation not just save costs and improve efficiencies, but eliminate potentially costly mistakes. Data errors and faulty information cost U.S. businesses \$3 trillion every year.
- ❖ The Salesforce Platform perfectly fits the needs of data automation. The suite offers businesses a wide selection of easy-to-use process automation tools, easily integrated with the existing systems and CRM data of an enterprise. Salesforce's certified specialists guide decision makers on a tour through the available tools, helping them discover powerful solutions perfectly suited to the exact requirements of their process automation needs.
- ❖ The Salesforce Platform also gives businesses to conceptualize, build, and employ custom automation applications in double quick time, using drag-and-drop app design tools and an extremely user-friendly interface. The Salesforce Lightning Process Builder gives organizations the power to turn, difficult, complex, and repetitive tasks into automated processes, pre-empting errors from descending into costly mistakes and trouble spots.



E-MAIL AND DOMAIN MANAGEMENT CONTROL IN SALESFORCE

- ❖ Salesforce simplifies the otherwise complex task of domain and email management. Websites and domains usually have a many-to-many relationship. Each domain may have up to 200 sites, and each site may be associated with a maximum of 500 domains. Each Salesforce community has two sites. Salesforce recommends hosting communities, Lightning Platform, and Site.com sites on one domain to simplify the domain requirements. Hosting Site.com sites on the same domain as the Salesforce Sites makes it easy to access Visualforce pages and Apex code. Salesforce simplifies the task of creating custom URLs for each site, to host more than on-site on the same domain.
- ❖ Salesforce offers highly powerful and flexible email management capabilities as well, making the task of engaging with customers very easy. Salesforce users have multiple options to despatch emails. They may send end user emails in Salesforce using Gmail accounts, use Office 365 accounts, through the company's email server, or even send email through Salesforce without integrating with an external email service. Salesforce offers simple and straightforward options for both companies that own a domain and those who do not own a domain, to set up email protocols.



SALESFORCE CHATTER FACILITATES SEAMLESS COLLABORATION

- ❖ Seamless and real-time collaboration is critical in today's highly fluid and highly mobile business environment. Today's opportunities have a very short window, with customers expecting instant replies or resolutions. Moreover, today's knowledge enterprise thrives on the free flow of information, and employees speaking up without the barriers of hierarchy.
- ❖ Chatter and associated collaboration apps available in the app exchange provides a forum for any connected employee or stakeholder to share insights or propose new ideas, to disseminate knowledge in a structured way, and also receive valuable feedback on programs, products, and campaigns. Chatter also helps to create and share polls on-the-fly, to gauge new ideas, or get focused feedback on some point. The mobile feed allows supervisors and team lead to track team members, track the progress of critical projects, and act in a timely way.
- ❖ Salesforce Chatter also offers the perfect collaboration tool to remain connected and engage with both static and on-the-move employees in real time. Chatter allows any



employee to connect with experts or anyone else from across the enterprise, regardless of their role, location, or rank. This makes collaboration on sales opportunities, service cases, campaigns, and projects very easy and seamless.

· CONCLUSION ·

Salesforce CRM allows businesses to spend more time doing what they are supposed to do – engage with the customer and develop products. Salesforce automates the routine and takes care of the non-productive activities, delivering optimal productivity and efficiency to enterprises.

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- ❖ How can Salesforce enable manufacturers to improve their conversions?
- ❖ 7 Questions to ask before a Salesforce lightning



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Our custom technology solutions ensure that you win stakeholder support, secure early wins through competitive advantage, and transform your business for future growth. And our tailor-made platform, Mekanate, helps you discover your business DNA from your passive and active data, and use it to initiate, integrate and achieve operational efficiency.

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Learn more: www.suyati.com

Get in touch: services@suyati.com

