

Survey of CRM Tools Salesforce

Ashish Bhoir

Student, Department of MCA

Late Bhausahab Hiray S S Trust's Hiray Institute of Computer Application, Mumbai, India

Abstract: *Welcome to salesforce the innovative company World's #1 CRM platform can access over the internet. There is no infrastructure to buy set up, or manage –just logged in and start the work. Now salesforce become more User Interface with the Lightning Experience gives the fastest, way to put customer at center of everything. Salesforce is leading CRM software it is design to manage organisation focus on customer and sales. It also offer feature that customize a inbuilt GUI to specific need of Bussiness. This make easy to manage the relationship with customer to better growth for organistion. Following their different features of Salesforce.*

Contact: It manage all the data to view customer contact details, activity history, communication.

Opportunity: It provide detail of the stage deal which product involved in deal, quotation of a deal that helps to identity the progress and close deal.

Salesforce Engage: It is personalization feature in salesforce sales cloud design that help marketer better. It also real time sales alert.

Sales performance Management: Sales performance management (SPM) is an approach to improving individual and team selling effectiveness throughout an organization by using data analysis, surveys, reports, and other sources.

Sales performance Management: Sales performance management (SPM) is an approach to improving individual and team selling effectiveness throughout an organization by using data analysis, surveys, reports, and other sources.

Lead Management: It can track all the lead management process like capturing lead, sales ready, convert lead to sales opportunity etc.

Partner Management: This help to build a community with partners. It directly connecting with channel partner to share goal, objective and activities.

Salesforce Mobile App: Mobile platform to carry out all activities

Workflow and Approval: It visual design to Aumotion business process. This is simple drag and drop to make design interface. It help to create Approval process with deal discount and expense management.

Email Integration: It is an existing email platform. This provide easily to team with no addition learning

Reports and Dashboard: We can create detail report and it can access from anywhere .Dashboard can create a Real time GUI image to show business progress in various form.

Security: Salesforce has a security level to secure at different level which user cannot access more than access given. It also provide sharing tools to open upo and allow acces .There are three level of security object level, Record level and Field level so this tools is so popular in salesforce

Flow Updates: Salesforce Flow allows users to automate and simplify complicated business processes, Ability to relabel button labels in a screen flow instead of developing a component to edit them. Including outbound messages, communication sent to external services, as an action in the flow builder. In a record-triggered flow, call a sub-flow and initiate element changes. In screen flow, customization is easier, and it's not necessary to build new flows from templates. Also, there is now a new Roll Back Records element.

Keywords: CRM, Cloud Technology, Salesforce, SAAS

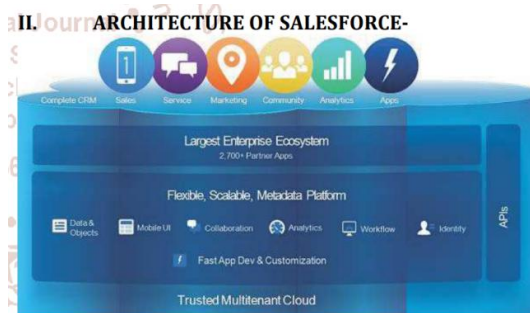
I. INTRODUCTION

Salesforce is a cloud based solution for CRM .So don't need to install any software or hardware. Salesforce has provide more than 800 application with various features and design Schema to a customer sales. It was an Innovative Platform

salesforce recently offering IOT to connecting CRM platform and many thinking about something during COVID-19. Salesforce is ability to Store Customer information as contact, Account, lead and sales in a location[1] future of crm. It manage all aspect of relationship between organisation and customer. For example the details of an customer if deal are currently in progress thus support request from a customer to a new lead. So it been storing and manage the details. This make easy to manage the customer Relationship

Cloud is an dynamic provisioning, it was defined in many way by different Author. It was an leading to server to store a data unlimited on renting of infrastructure or service pay as utilize basic.

Cloud puts three type as service SAAS, PAAS, IAAS.[2] cloud environment.



Trusted multitenant

It is an application which widely in groups and client thus has one server. So all the data has securely Single from Another. Its make an various application which can uploaded in cloud can be share in multiple group of client.

Metadata platform

Salesforce has different meta data is data of data

It has been store in various data to different layer so it configure in object such as record.

API Services

API is used to programatically name can access through to do an DML event can be called in apex, trigger, visual force.

II. OBJECTIVE

- Salesforce fully focused on Customer Success
- There is availability and performance to meet expectation of client
- It has been long term profitable from product market.
- To be an build Community to Partner Management.
- CRM is an very great tool which can be used easy.

III. LITERATURE REVIEW

Customer Relationship Management (CRM) has one of most dynamic technology. Due to the Current development and advance in information and enterprise software technology. CRM is an relationship Marketing of product-centric Marketing which give long term profitable of customer. Now a days it become more useful as result should driven to keep marketing in highly saturated. CRM as a product managing, Testing included billings, Marketing sales and Engineering. CRM has been minor opportunity of the customer delivery. Salesforce has been enterprise wide integration of technology which widely work as together of phone, internal, web-site etc. CRM is an successfully tools because of process management, automation, vf, apex, which is using importance of CRM. IT helps to manage the profitable product as future and present. It was shown how sales cloud in salesforce increasing a sales of amount product has been lead and sales providing helps to judge faster. Some of the key business in sales cloud was close more deal, close deal faster, get more deal, quicker decision. Salesforce is an largest known crm and thus advantage the resources sales provide to a user. it can be easy to use as an admin no need to code has on implementation on various tools.[review of salesforce]

Salesforce is inventory as service based platform which would to be application like phone calls, email, social media. Many of the application used in salesforce like badger, chatter, phone burner and many more. so it has been ability to perform demanding of client. while the selling the product sales manager keep watch on the purchase and analyze the all details. so it can also show the multidimensional view of the progress to enhance the growth of sales and easily track all the tasks, calls, email which has been plan on the priority of the customer to completed all the activities. Therefore it is very scalable platform to the growth of business. [future of crm].

III. RESEARCH METHODOLOGY

Salesforce is an no #1 CRM tools which can easily manage to customer. Its was an different metadata which all used in design schema. It helps to show the how business growth revenue in different dimensional. it can be access easily in cloud helps to create flexible and scalable such as data object, mobile UI, Analytics, workflow, identify. It was large ecosystem 2700+ partner and over 800 application with different features.

Salesforce growing more and many different feature which might helps to complete UI and make easily. However when the lightning was invented in 2015 lots of easily to manage to make user friendly organization. its provide next generation UI and UX in salesforce it helps to create modern productivity booster in experience. There is different Analytics in salesforce while in organization lots of data which store in company so it can be make different report. i.e if company want to make an reports of all account and mixed with all contacts report so it can be make analytic joined reports and make the report dashboard in 7 different graphic user interface.

Salesforce Business process automation used in various condition thus as workflow, process builder and Approval process to make an email alert, create task, outbound message. some of the process done in business process.

CRM is complicated application which mines customer data, which retrieve from all touch. The right type of customer and predicting trend in future purchase. CRM means an enterprise technology such sales cloud, service cloud, marketing cloud. Following are the some of the new features are recently update in salesforce.

IV. ANALYSIS, FINDINGS & CONCLUSION

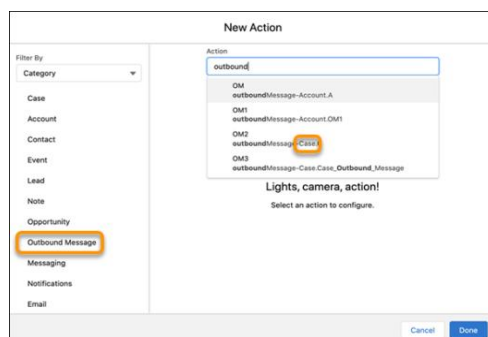
4.1 Flow Updates

The amount of updates Flow is a real game-changer and the winter '22' release...

- Record-Triggered Flow Start Element Changes
- Call a Subflow from a Record-Triggered Flow
- Screen Flow: New Roll Back Records Element
- Relabel the Navigation Buttons in a Screen Flow
- Ability to Reconnect Flow Elements in Auto-Layout
- Configure Batch Size for Scheduled Paths in Record-Triggered Flows. New 'Minutes' Options for Offsets (for Scheduled Paths in Record-Triggered Flows)
- Debugging Enhancements for Record-Triggered Flow

4.2 Send Outbound Message with Salesforce Flow

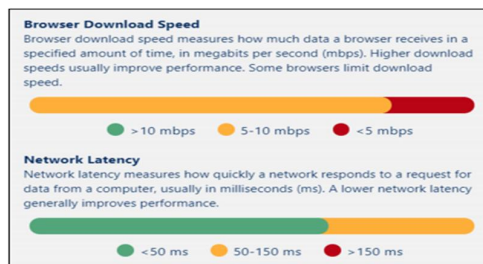
Outbound Message are now available as an action in the flow builder. Outbound Message send messages to external services, beyond Salesforce.



4.3 Lightning Page Performance

Over the past year, Salesforce has put a big emphasis on allowing Admins to improve the speed of their Org. The Analyze button on Lightning Pages lets Admins to see the predicted load time of pages, and provide:

- You can now view org-specific metrics including your users network latency, browser speed and number of cores-giving you greater visibility into actual load speeds.
- Whenever you build a page in Lightning App Builder, the performance analysis will run automatically providing recommendations if your performance is poor or moderate.
- If you're using custom Lightning Components, Salesforce will provide more detailed analysis. This includes recommendations if your component contains External CSS and Unminified JavaScript etc...



4.4 Dynamic Gauge Charts in Dashboards

Dynamic Gauge Charts have been a long time coming for Salesforce Admins and users. Previously, Gauge charts have only allowed you to track KPI's against static numerical goals.

V. CONCLUSION

The main purpose to write this paper to survey on Salesforce how it growing technology day by day in a marketing and stored a data into cloud. It easy to setup and scalable platform that help the bussniess growth of many of tools security model,apex,triggers, Analytics,etc.now many of new feature are updates how automation work with flow and some GUI in dashboards with the new UI in lightning version of salesforce. This paper was give all the information about the tools, application and how it manage relationship with customer.

REFERENCES

- [1] Dr Sahil Verma Assistant Professor Lovely Professional University Phagwara, India sahil.21915@lpu.co.in-2018
- [2] Author: Manvi Seth Mulesoft Certified Developer - Integration and API Associate IT Engineer,Cisco Systems Bangalore, India-2018
- [3] Yogeshchandra Puranik Assistant Professor, Affiliated to Department of (MCA), P.E.S.'s Modern college of Engineering, Pune, India-2018
- [4] Varun Vijayanand M. 1* , Deepamala N. 2 1,2Dept. of Computer Science and Engineering, R.V College of Engineering, Bangalore, India vvijayanand16@gmail.com-2020
- [5] Harshada J. Visave, Prof. Pratibha Adkar MCA Department, Modern College of Engineering, Pune, Maharashtra, India-2021
- [6] <https://www.salesforce.com/in/>
- [7] <https://www.guru99.com/salesforce-tutorial.html>
- [8] <https://www.g2.com/categories/salesforceappexchange-apps>