Integrating and Customizing Salesforce.com
The Essential Guide
What’s in this Guide?

- **Ease of Use and System Design**: How easy is the system to use for your company’s users? What are the best features of this system, how do they work and what can they do for your team?

- **The Data Model**: How are Salesforce’s objects setup? How will data flow between those objects?

- **Customization**: Mainly we will look at custom fields and custom objects in Salesforce, as well as layouts. Everyone needs the almighty lead object, but after you’ve successfully implemented the standard Salesforce objects, what else can you create to represent your business?

- **Automation**: Automation refers specifically to lead assignment and workflow rules. We’ll review these capabilities in Salesforce and focus on ease of use of these features.

- **Integration and APIs**: How easy are Salesforce’s APIs to use? Are there available integrations for the system and will it be easy to incorporate existing product and business data into the system?

- **Pricing and Scalability**: We’ll review the pricing and editions that Salesforce offers, including the flexibility you get and the pros and cons of certain editions.

- **Mobile**: Short review of available mobile applications that exist, developed by the company themselves or by a third party. Focused on iOS and Android apps only.

- **Overall**: Bottom line: how good of a system is this for your business.
Salesforce.com ("SFDC") is the leader in today’s massive cloud based CRM market. In fact, in a recent study, 45% of companies with up to 1000 employees report using Salesforce.com, with Dynamics CRM and Oracle in second and third respectively.

SFDC is the leader for a reason: they were the first CRM company to focus primarily on cloud-based infrastructure for their software, and first movers advantage seems to have worked out very well for the San Francisco company. They are also the most powerful CRM among other competitors, having taken a platform approach to their software from early on. Salesforce has a large part of their development team working on the platform piece, where they produce APIs that allows internal and external app developers to write apps on top of.

This approach has enabled SFDC to give their users not only the ability to vastly customize the system to suit their business, but also to enable independent developers to write apps on top of SFDC and sell those apps in the Apple App Store-like AppExchange.

There's no doubt that SFDC is a powerful product that seems attractive. The question you must answer is whether SFDC is the right CRM for your business. The answer will probably be influenced by cost, company size and feature need.

Let's dive a little deeper.
Ease of Use and System Design

Salesforce has essentially the same high level design as other CRM's: their lead management setup looks like other CRMs (Lead Contact, Opportunity, Account).

Because of the ease of SFDC's customization capabilities, the typical SFDC implementation has some custom objects built into it and configured, which play into a customer's lead and customer management workflow in the system.

For example, if you are a software as a service business (as we are), you may want to have a custom object that represents a "subscription." Or perhaps you're a consulting company that's using SFDC – in which case you may want to build and configure a custom object to represent a consulting engagement.

Integration between objects (both standard and custom objects) in Salesforce is critical. Much of the time, this needs to be handled by SFDC APEX code, which is the product's own Java-oriented scripting language that gets tested and deployed within SFDC.

For example, if you have a contact record in SFDC, and a change to a field value on that contact should update the parent account record, a simple workflow in SFDC will not make this happen – you will need to write code to accommodate this.

Unfortunately, this means that fully implementing SFDC at your company could become quite costly, should many customizations need to be made. It’s not a cheap or easy system to implement.
Sales records start as **Leads** in Salesforce. **Leads** are people and are sales leads, either qualified or un-qualified and can be associated with **Campaigns**.

**Leads** are assigned to sales reps via automated Assignment Rules. If qualified, leads are then converted into **Contacts** and associated with an **Account**.

**Accounts** are companies in most cases. **Opportunities**, which represent “deals,” or pieces of business are also associated with **Accounts**, and therefore have contacts linked to them as well. A “closed/won” deal is used to mark a customer.

Salesforce.com gets more powerful when you create **Custom Objects** to represent the different aspects of your business. These objects can be related to other objects in the system and customized.
**Implementantion and Customization**

**Custom Fields**
Salesforce.com makes it easy to create custom fields of various types. They do limit the amount of custom fields that you can create in the system however, which is part of their pricing structure. Something to be wary of in your purchasing process.

**Layouts**
SFDC layouts are easy to change and manipulate to suit the fields that you’d like to display to your users. Interestingly, the Salesforce platform also includes layouts that you can create on your own: literally your own custom HTML/CSS/JavaScript that you can place in layout elements on the page. This part of Salesforce is called VisualForce, read more about it here.

**Custom Objects**
Custom objects are a big part of SFDC for most companies. You can easily create custom objects in SFDC, and setup automation between those custom objects and other object data through workflows or custom code.

**APEX Code**
APEX is SFDC’s proprietary scripting language that allows for deep customization of your SFDC instance. You can use APEX to manipulate data between different objects in SFDC, create new records or edit existing records automatically.
Automation

Salesforce.com automation features allow you to setup rules that assign leads and manipulate data within an object.

Lead Assignment - Users and Queues

Lead assignment in Salesforce is used to assign lead records to users. A lead assignment rule looks at a specific set of criteria on a lead and if the criteria evaluates to “true” (based on a formula or a set of rules), then that lead will get assigned to either a user or a queue. A queue in SFDC is a separate data structure that “owns” records. When a record is assigned to a queue, a workflow or APEX code can assign it to a user. For instance, if a lead isn’t initially qualified, you can assign it to a queue first, then if they become qualified, you can re-assign them to a user at that time.

Workflows

SFDC workflows are similar to workflow rules that you may have used in other systems. Each workflow rule consists of criteria that cause the workflow rule to run and immediate actions that execute when a record matches the criteria. For example, SFDC can automatically send an email that notifies the account team when a new high-value opportunity is created. Workflows can also have time-dependent actions that queue when a record matches the criteria, and execute according to time triggers. Workflows only work within a single object (like an account or opportunity) or on a child objects like tasks.
Notes on APEX

More APEX: Develop and Deploy

The workflow for Salesforce's APEX development framework is similar to other “Build > Test > Deploy” development frameworks. SFDC does maintain that your code pass at least xx% of code coverage in order to be deployed, essentially protecting you from yourself.

SFDC Enterprise instances also come with sandbox instances that you can use to deploy the code to initially, test it and then deploy to your production instance once you’re content with the functionality.

APEX Triggers

APEX triggers are bits of code that you can configure to be executed at certain times, such as: insert, update, delete, merge and upsert. For instance, you can have a bit of code that will change a field/value on an account record “after update” on a contact record. Triggers are powerful ways to modify and manipulate data in the system, and take workflows to a whole new level.
Integrations, APIs and AppExchange

Many Salesforce integrations are available through third party integration providers like Bedrock Data, as well as on the Salesforce AppExchange, which is the (self proclaimed) world’s leading business app marketplace. There are many integrations on the AppExchange already, along with other apps that may be able to help your company. It’s worth having a look at the marketplace to see if any may help your company with your usage of SFDC.

For integrations or your own internal use, SFDC also provides API access for customers on the Enterprise and Unlimited editions of the product. There are a few different APIs that may be useful to your team, including a REST API that allow you to work with JSON or XML, as well as a SOAP API that returns XML data.
There’s no doubt that Salesforce is a very scalable system – in fact it can really scale just about as large as your company will get, especially with the amount of customizations available to you in the Salesforce platform.

The drawback with it is in its pricing – it’s not cheap. Plans start at $25/user/month for the Group edition, but to get workflow, automation and APEX access to really customize and scale the platform, you’re going to have to go with the Enterprise edition, which is $125/user/month.

Here’s a pricing breakdown:

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<thead>
<tr>
<th>Plan</th>
<th>Features</th>
<th>Price</th>
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<tbody>
<tr>
<td>SALESFORCE GROUP PLAN</td>
<td>Base features supported. Including lead management, Chatter and Cases</td>
<td>$25/user/month</td>
</tr>
<tr>
<td>SALESFORCE PROFESSIONAL PLAN</td>
<td>Campaign support (does not include marketing cloud), dashboards, roles</td>
<td>$65/user/month</td>
</tr>
<tr>
<td>SALESFORCE ENTERPRISE PLAN</td>
<td>Workflows, APEX code support, full sandboxes, history tracking</td>
<td>$125/user/month</td>
</tr>
<tr>
<td>SALESFORCE UNLIMITED PLAN</td>
<td>Pretty much unlimited everything, including 24/7 support</td>
<td>$250/user/month</td>
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As a comparison, Salesforce.com is essentially the priciest system out there for what you get. Notably, it’s also the most powerful.
Salesforce made news last year at their massive Dreamforce conference in San Francisco with the release of Salesforce1.

With the announcement of Salesforce1 comes improved APIs and AppExchange, and also a new mobile app, which was a long time coming for SFCD customers.

The app itself has mostly good reviews in the iPhone and Android marketplaces:

<table>
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<tr>
<th>APP STORES RATINGS</th>
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<tbody>
<tr>
<td>IPHONE</td>
<td>3.5/5 STARS</td>
</tr>
<tr>
<td>ANDROID</td>
<td>3.7/5 STARS</td>
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The app gives you basic control over your Salesforce data: create, edit and delete records, and also lets you switch between accounts with ease.

You can access Salesforce apps that you’ve installed in the mobile app as well – and everything can be administered from your Setup area in Salesforce.com.

A big step forward for the company in terms of their mobile strategy, but nothing mind blowing here. Salesforce1 is a useable, adequate mobile app that will likely improve over time (we’re bullish on it).
Overall Takeaways

Salesforce.com is a great product - there’s a reason it’s considered the leader in the CRM space today.

It has the features and flexibility to fit virtually any business, small or enterprise alike. You can also scale exceptionally well with Salesforce as your company grows.

The issues that we find are mainly based around costs to achieve that scale and growth with the product. The brilliance of Salesforce is perhaps their business model (based around user seats), combined with the features that enable more than sales people to use the product. At many companies, support teams, consultants and account managers will also use SFDC, alongside sales team members.

These added users will drive up your costs considerably. For instance, if you have a sales team of 30 reps, a support team of 10 reps and 20 other account managers and consultants, those 60 users at the Enterprise edition are going to cost you upwards of $100,000 per year and that doesn’t factor in implementation costs.

We’re not here to complain about the price of Salesforce.com however. We actually recommend it to companies who can afford it and want to grow quickly. If you’re in that category, our advice is to not mess around with the Group or Professional editions, and go right to Enterprise - it’s simply not worth the money when there are other, cheaper systems out there with the same functionality (Zoho, Sugar and Dynamics CRM).
In Conclusion

Hopefully we’ve provided you with helpful information that you can use to make educated decisions about implementing, customizing and integrating Salesforce.com. Should you have any questions about anything that may not have been covered in this guide, feel free to contact us at any time. We will be more than happy to get you started.

Easily Integrate Your Business Data

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