



Salesforce Sales Cloud

Review From A Customer



From IT Central Station, the leading review site for enterprise technology solutions.

Review by a Real User

Verified by IT Central Station



Consultant with 51-200 employees

it_user82785

VALUABLE FEATURES

Ability to add custom objects (tables) into the database means Salesforce can be tailored to any business. The workflow capability makes it possible to automate labour intensive tasks such as sending standard emails at pre-defined points within business processes.

IMPROVEMENTS TO MY ORGANIZATION

Automation of routine emails, centralisation of data, standardisation of company processes, on demand access to reports and dashboards, 360 degree view of customer records and history.

ROOM FOR IMPROVEMENT

Some areas of functionality from early versions of Salesforce getting a little dated and in need of overhaul. Examples include activity management.

USE OF SOLUTION

4 years

DEPLOYMENT ISSUES

Installing Salesforce for Outlook needs careful preparation and confirmation of users' version of Windows and Outlook.

STABILITY ISSUES

Salesforce is very stable. I have not experienced any major outages since using the system.



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SCALABILITY ISSUES

No

CUSTOMER SERVICE AND TECHNICAL SUPPORT

Customer Service: Salesforce customer service is efficient. Technical Support: Salesforce technical support is efficient.

INITIAL SETUP

As a Salesforce implementation consultant, I have seen Salesforce setup in many organisations. Whilst it is easy to configure Salesforce, it is not always done in the most appropriate way. For example, creating custom fields when it would be better to create a custom object related to a master object. A specific example would adding fields to an Account to record customer satisfaction on a monthly basis. Better to create a custom object rather than adding a new set of fields each month.

OTHER ADVICE

Think about the Reports you want to run before you begin configuring Salesforce. Otherwise you may find you configure the system in a way that is incompatible with the Reports and Dashboards you need

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