



**Salesforce Sales Cloud**

# **Reviews, tips, and advice from real users**



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# Product Recap



Salesforce Sales Cloud

# Salesforce Sales Cloud Recap

Salesforce Sales Cloud is a comprehensive CRM platform designed for efficient lead management, sales forecasting, and customer engagement, offering extensive customization and cloud-based accessibility.

Aimed at enhancing business efficiency, Salesforce Sales Cloud supports core business processes like CRM, lead and opportunity management, sales forecasting, and customer engagement. Its robust integration capabilities allow seamless connectivity with ERP systems and various applications. The platform offers pipeline tracking, process automation, and advanced sales cycle management. Users appreciate its cloud-based accessibility, allowing teams to operate remotely and manage sales operations effectively. However, users highlight concerns about its complexity, cost, and the need for a more intuitive interface.

## What features does Salesforce Sales Cloud offer?

- Customization: Tailor the CRM to meet specific business requirements.
- Robust Reporting: Comprehensive analytics and data insights.
- Lead Management: Efficiently manage and convert leads.
- API Integration: Seamless connectivity with multiple applications.
- Cloud Accessibility: Work from anywhere with cloud-based access.

## What benefits should be evaluated in Salesforce Sales Cloud reviews?

- Enhanced Productivity: Streamline sales processes with automation.
- Improved Collaboration: Facilitate team coordination and client engagement.
- Accurate Forecasting: Make informed decisions with reliable sales forecasts.
- Flexibility: Accommodate diverse industry needs with ease.
- Legacy System Integration: Efficiently update and integrate with existing systems.

Salesforce Sales Cloud is widely implemented across industries such as finance, healthcare, and retail, supporting sales teams in tracking and managing sales operations. Its use extends to reporting, collaboration, and enhancing client interactions, allowing companies to tailor Salesforce to meet industry-specific requirements efficiently.

# Valuable Features

Excerpts from real customer reviews on PeerSpot:



“Salesforce Sales Cloud is very stable.”



**NavinJacob**

CTO at Cipher7



“Salesforce is very user-friendly, which makes it effortless to track business management reports.”



**Sundus Ajmal**

AWS Cloud Engineer at Accenture



“We can implement checks to ensure proper data entry with validation rules.”



**RohitPothani**

Solutions Architect at Merino Consulting Services

- ✓ “Sales Cloud's reporting and analytics capabilities influenced our sales strategy quite a lot. We can build every report as a dashboard, and there are various sorts of things.”



**Richard Mottershead**

Enterprise Architect at a non-profit with 501-1,000 employees

- ✓ “The solution is stable.”



**EDUARDO GALLI**

CEO at Softwall Soluções em Tecnologia LTDA

- ✓ “Salesforce provides a lot of tools out of the box like opportunity tracking, automation, and linking between account, contact, and posting.”



**Renu Soni**

Senior Salesforce Developer at a transportation company with 201-500 employees

- ✓ “The tool is quite flexible.”



**ChanchalSaxena**

Lead Digital Transformation at Kohler Co.

## What users had to say about valuable features:

The Einstein Analytics and the inbuilt reporting are very useful for keeping track of pipeline movement. The customizability using the lightning features allows customization for specific business flows or departments. It is easy to customize. The main features are these. Additionally, it is very effective when used with discipline, providing a real-time view of the sales organization, benefiting from proper marketing campaigns and integrations.

**NavinJacob**

CTO at Cipher7

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“Primary features include navigation and process flow, which indicate your stage throughout the opportunity’s life cycle. At any given point, it shows your current status and probability. The reports and dashboard functionality are major highlights of Salesforce. Additionally, it is user-friendly and has a simple configuration, making it easily adaptable to any sales-related detail..”

**RohitPothani**

Solutions Architect at Merino Consulting Services

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“Salesforce’s **user-friendly interface** makes it effortless to **track business reports, manage tasks, and access key sales data** efficiently. The ability to **segregate tasks by focus areas** provides quick visibility into **new business management and reporting**, ensuring streamlined operations.

Additionally, its **clear visibility and intuitive navigation** enhance **data management and cross-departmental collaboration**, making it a valuable tool for **tracking progress, optimizing workflows, and driving business growth..”**

**Sundus Ajmal**

AWS Cloud Engineer at Accenture

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“One of Salesforce's key features is its comprehensive management of the opportunity pipeline. You can document all relevant details during client discussions and use Chatter for team communication. Roles and permissions allow team members to see the status of opportunities and plan their actions accordingly. Salesforce offers extensive customization options, allowing you to tailor the opportunity pipeline to meet specific customer needs.

Additionally, Salesforce supports integration with various tools. You can connect it with marketing solutions, whether Salesforce's own or third-party platforms. Telecalling and quotation generation can be managed directly within Salesforce, eliminating the need for separate tools. The platform also facilitates asset assignment during contract phases. .”

**Rahul Rupela**

Manager Strategy and Consulting at Cybertech Systems and Software Limited

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“The functions of the Salesforce Sales Cloud that I have found most valuable are mostly because it's a CRM system; it's a central location where you gather all of your customer information, and based on that complete view, you can act. But that's not specific to Salesforce Sales Cloud; it's to any CRM system.

“We've got a highly customized solution from Salesforce Sales Cloud, so we do use automations in some areas. Not specifically for sales, but we do automatic quoting, for instance; that's an automation.

“The biggest benefit of the Salesforce Sales Cloud is a centralized point, a centralized source of truth for customer-related information; you centralize all the information in a single database, and that's the biggest benefit. The second benefit is that you can analyze or standardize processes in different areas; for sales, for service, for marketing, there are many ways in which Salesforce Sales Cloud can be used to improve a company's processes..”

**Luís Silva**

Chief Technical Lead at a consultancy with 201-500 employees

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“Salesforce Sales Cloud itself is a wonderful solution, and there are two different versions: Lightning and classic. The Lightning version is a new generation version compatible with any mobile device, whether it's a phone, iPad, or any size of screen. The reporting and analytics functionalities, especially with the Einstein feature, are wonderful because it allows for analysis of data regarding your opportunity pipeline, giving insight into how long it will take to close deals. This gives a great understanding of running different levels of campaigns and defining smart workflows, where if one task is done, the other task can automatically get created and assigned to different team members. This flexibility is a key benefit of Salesforce Sales Cloud.

“Lead management is a great feature in Salesforce Sales Cloud because if you go for enterprise and above licenses, you can define different record types. For example, if one company is into two different businesses such as real estate and car reselling, both being opposite, this can be defined in Salesforce Sales Cloud, allowing for different workflows, fields, and mechanisms that do not affect each other's operations.

“The predictive insight feature known as forecasting is a very old feature of Salesforce Sales Cloud, giving predictions based on your pipeline and previous opportunity closings. The new Einstein analytics feature is more advanced and is enabled with AI, providing better forecasting based on your current pipeline. Salesforce Sales Cloud is working smartly with AI to help close more deals based on opportunity stages, trends, and industries, advising on the steps to take next.

“Lead generation is the most important thing because every sale starts from the lead. At the lead level, different stages and resources can be defined. You can capture leads from various resources, with Salesforce Sales Cloud offering a web-to-lead feature and integrations with LinkedIn to fetch data. Once a lead is qualified and converted into opportunities, there are stages with percentages, and workflows can help in easily closing deals..”

**Kamal Deep**

Founder and Salesforce Consultant at SaaSnic

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# Other Solutions Considered

There are several AI-based tools available that offer easiness to use. Tools like Zoho, Zendesk, and Dynamics have been mentioned as alternatives. Some solutions are more AI-native, useful for sales pipeline monitoring and operations management.

**Navin Jacob**

CTO at Cipher7

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“We used a different solution. We decided to move mainly because the old solution was long in the tooth, no longer supported, and would have needed substantial updates. It wasn't really a solution that could be used for a membership management system..”

**Richard Mottershead**

Enterprise Architect at a non-profit with 501-1,000 employees

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“Salesforce is a huge competitor of Microsoft and other solution providers. We chose Salesforce Sales Cloud because it is quick to launch. We could start working with it immediately..”

**MarwanRefaey**

Senior Sales Director at Comviva

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“I would compare Salesforce Sales Cloud to Microsoft Dynamics CRM, which is the second player in the market; from my perspective, Salesforce Sales Cloud is the biggest player.

“Dynamics CRM is the closest one, but Salesforce Sales Cloud is much bigger still..”

**Luís Silva**

Chief Technical Lead at a consultancy with 201-500 employees

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“I use Provar, which is Salesforce's test automation solution. My job profile involves more testing, and what our company's customers do is that they test Salesforce implementation for their internal implementations or for what they have implemented in Salesforce. In my company, we have a very diverse portfolio in terms of customers, as some use Salesforce Experience Cloud, while others use Salesforce Marketing Cloud or Salesforce Sales Cloud. I have experience with almost every tool from Salesforce since I have dealt with multiple solutions depending on customer's requirements. If you ask me what feature I am using in the tool specifically, I would say that I have touched almost every other feature offered by different tools offered by Salesforce..”

**Tarun Prashar**

Tech Architect at Provar

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Yes, I have previously worked with **AWS**, particularly on a project focused on **automation in the education industry**, where it was primarily used for **data management and training booking systems**. AWS provided a **scalable and flexible cloud infrastructure**, enabling efficient handling of large datasets and automated workflows.

However, on other hand Salesforce started to use for its CRM capabilities, **advanced sales tracking, and seamless business development tools**. Salesforce offers **better customer relationship management, pipeline visibility, and integrated analytics**, making it a more **comprehensive solution for sales-driven operations and strategic decision-making**.

**Sundus Ajmal**

AWS Cloud Engineer at Accenture

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# ROI

Real user quotes about their ROI:

Salesforce Sales Cloud is a fantastic tool but requires disciplined data entry by sales personnel and operations teams to maintain data quality. When handled properly, it brings substantial ROI, especially for larger organizations. For smaller teams, alternatives like Zoho might be more cost-effective.

**NavinJacob**

CTO at CIPHER7

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“The return on investment is based on the tracking of the tasks. We can build campaigns. It makes the investment work. The main benefit is how the product integrates with the campaign tool and provides features to track the campaigns..”

**VINICIUS STRACK**

Enterprise Architect at Olist Digital

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“It streamlines the entire sales process, allowing top executives, such as the CEO, to easily access sales performance data without connecting with numerous individuals. They can review pipeline statuses and overall performance directly from their laptop. This efficiency significantly benefits CXO-level executives by providing a clear and comprehensive view of sales operations..”

**Rahul Rupela**

Manager Strategy and Consulting at Cybertech Systems and Software Limited

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“I always address requirements gathering with new clients, considering their vision for the future as it's crucial. We are not just implementing Salesforce Sales Cloud; we need to understand what the customer wants to achieve in 5 to 10 years. Implementation should align with their requirements and vision, so we prepare a scope of work document and suggest improvements. Many first-time CRM users are unaware of all features and best practices, so we guide them with use cases, sample work, or sometimes create a POC to show them how their system will look and the expected outcomes, ensuring the ROI is beneficial for them..”

**Kamal Deep**

Founder and Salesforce Consultant at SaaSnic

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The **Return on Investment (ROI) with Salesforce** has been significant, particularly in **streamlining sales operations, improving data visibility, and enhancing collaboration** across teams. we have effectively addressed this by **providing structured guidance and step-by-step instructions** through **documentation and internal training sessions**.

By ensuring proper onboarding and support, we have enhanced **user adoption, efficiency, and overall productivity**, maximizing the **value derived from Salesforce** within our organization.

**Sundus Ajmal**

AWS Cloud Engineer at Accenture

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“Our customers have gained significant benefits. The customers I worked with used to manage their leads and opportunities using Excel and other local applications. When we implemented Salesforce, we unified all the data from different companies within a group onto a single platform. We performed the data migration and provided access to all sales representatives.

As a result, the sales process, lead generation, and opportunity management saw a drastic reduction in order processing time. Previously, closing an opportunity took at least two to three weeks. With Salesforce Sales Cloud, due to the visibility of the data structure, insights, and analytics, they could make decisions more quickly..”

**RohitPothani**

Solutions Architect at Merino Consulting Services

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# Use Case

“For managing two different things, I'm managing some sales pipeline, the pipeline of sales of some products, and also doing marketing automation for after-sales..”

**Luís Silva**

Chief Technical Lead at a consultancy with 201-500 employees

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“Any organization with leads and a positive pipeline that spans different geographies can benefit from using Salesforce Cloud to manage its entire sales cycle effectively..”

**Rahul Rupela**

Manager Strategy and Consulting at Cybertech Systems and Software Limited

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I generally use Salesforce Sales Cloud for our sales process, setting up the entire opportunity lifecycle from lead generation to contract closure. It helps integrate our sales process with contract management and marketing solutions, ensuring that analytics are available for management and operational monitoring of sales figures.

**NavinJacob**

CTO at Cipher7

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“I have expertise in Salesforce Sales Cloud, Revenue Cloud, and a little experience in Experience Cloud as well. I have been using Salesforce Sales Cloud for around three years. The Sales Cloud is generally used for lead management, where we can grab leads, convert them, and track opportunities and accounts. It helps manage our entire business process and track revenue by setting up quotes, orders, and invoices..”

**Renu Soni**

Senior Salesforce Developer at a transportation company with 201-500 employees

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“My **primary use case for Salesforce** is to **streamline sales strategies, define key sales parameters, and manage focus areas** effectively. I leverage Salesforce to **record, track, and optimize our sales processes and business development deals**, ensuring seamless pipeline management and data-driven decision-making.

Additionally, I utilize **Salesforce’s reporting capabilities** to generate insights for **new business management**, enabling proactive engagement and strategic growth planning. In previous projects, particularly in the **automobile industry**, I used Salesforce to **manage global car orders through a customer portal**, enhancing operational efficiency and customer experience..”

**Sundus Ajmal**

AWS Cloud Engineer at Accenture

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“For every cloud of Salesforce Sales Cloud, we work with them because we are partners for the last 15 years.

“The feedback about Salesforce Sales Cloud is related to our recent delivery of a large project in the solar industry, where we have utilized Agentforce, the AI. The implementation timing was almost one year. In this project, we have not only automated the whole AI journey but also achieved huge success with the three minutes quote process. If you land on their website, you enter your information, and your quote is ready, absolutely perfectly fine with the correct data and service provider. You can get your quote done within three minutes. The moment you hit claim now or save for later, the AI starts working, which includes auto follow-up via email, SMS, and even voice agent calls to help sellers sell faster.

“The company name is The Very Good Solar Company. They are based out of Utah in the US, and the CTO is our very old client. This is the fourth project we have done with this client, where we have implemented Salesforce Sales Cloud, which is the unlimited edition of the highest edition of Salesforce Sales Cloud. We have fetched the whole data for every state because in every different state, there are different products permitted by the US government. We have integrated a couple of applications that tell you your monthly bill for the whole year and also check the rooftop, as the Google Solar API has been integrated, giving accurate information about roof size, how many maximum panels can fit, shadow analysis, and financial analysis from the Solar API. Based on that, it tells you that the 100% offset can be achieved with eight, 12, or 16 panels, increasing by four panels each time. That is the configuration we have done, and that's all we have for now..”

**Kamal Deep**

Founder and Salesforce Consultant at SaaSnic

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# Setup

The setup process involves configuring and preparing the product or service for use, which may include tasks such as installation, account creation, initial configuration, and troubleshooting any issues that may arise. Below you can find real user quotes about the setup process.

The initial setup requires expertise from individuals with Salesforce experience. Once the basic organization structure is established, adding or removing users is simple and does not require complex procedures.

**NavinJacob**

CTO at Cipher7

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“The initial setup doesn't take much time, it depends on the deployment tool used. For Capado, the setup might take one day or half a week. For others, it may be as quick as one hour..”

**Renu Soni**

Senior Salesforce Developer at a transportation company with 201-500 employees

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“Lead generation is crucial as every sale starts from the lead. At the lead level, different stages and resources can be defined. You can capture leads from various resources, with Salesforce Sales Cloud offering a web-to-lead feature and integrations with LinkedIn to fetch data. Once a lead is qualified and converted into opportunities, there are stages with percentages, and workflows can help in easily closing deals..”

**Kamal Deep**

Founder and Salesforce Consultant at SaaSnic

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“The initial setup depends on the organization's requirements. It is relatively straightforward for a small organization with only fifty licenses. However, for a larger organization that needs 500 licenses and has extensive requirements, the process becomes more complex due to the significant customization needed. Thus, the setup complexity is directly tied to the client's specific needs.

I rate the initial setup a six or seven out of ten, where one is difficult and ten is easy..”


**Rahul Rupela**

Manager Strategy and Consulting at Cybertech Systems and Software Limited

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“The initial setup process for the Salesforce Sales Cloud very much depends on how customized you want to have your solution, so there is no easy answer for that one; it depends on the customer and the level of customization that you want. If you want to use the system out of the box, you can do that, but probably it won't fit your business process. If you want it to fit your business process, you've got to do configuration or possibly even custom development. Overall, I think, as a system, it's one of the best systems to configure and customize, but there's a learning curve like most systems, and it depends mostly on the process. On a scale of one to ten, being ten the easiest to customize, I would classify it as a seven..”

**Luís Silva**

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Chief Technical Lead at a consultancy with 201-500 employees

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The **initial setup of Salesforce** was a structured process that required **custom configurations and integrations** to align with project requirements. During my involvement in an **automobile industry project**, we implemented **multi-language support** within Salesforce to accommodate users across different regions.

This setup involved **custom coding, localization configurations, and integration of language packs** to ensure seamless user experience and accessibility. By leveraging **Salesforce's customization capabilities**, we successfully enhanced **global usability**, allowing regional teams to operate efficiently in their preferred languages while maintaining a **unified sales management system**.

**Sundus Ajmal**

AWS Cloud Engineer at Accenture

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# Customer Service and Support

Support requires a subscription and when taken, the service is pretty nice. Larger customers receive better responses, while smaller customers may experience challenges.

**NavinJacob**

CTO at Cipher7

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“Most of the time, customer service resolves the issues effectively. Sometimes they provide guidance on whether the issue is on their side or ours and suggest solutions..”

**Renu Soni**

Senior Salesforce Developer at a transportation company with 201-500 employees

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“Responses in production environments are prompt, with issues addressed immediately. However, for concerns in sandbox environments, response times may be longer, often taking up to a week or even a couple of weeks for resolution..”

**RohitKumar16**

Lead Consultant at CGI

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“It offers excellent technical support with multiple service levels. For prime customers, on-call support is available. There are three levels of support: at the basic level, you raise a ticket and receive a response based on the ticket's severity within 24 hours, with most issues resolved in a few days. Prime customers benefit from direct, on-call support, ensuring a high level of service..”

**Rahul Rupela**

Manager Strategy and Consulting at Cybertech Systems and Software Limited

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“The solution's technical support is poor. Technical support depends on the package a user has taken from Salesforce. The tool has separate technical support packages, such as premium, gold, and some other options. The support one receives depends on the type of support package purchased.

I rate the technical support a seven out of ten..”

**Vimal Bhardwaj**

Deputy Manager, Information Technology at Greenpanel Industries

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“There are two types of support: free and paid. Paid support provides quick assistance within 24 hours and can include technical help through screen sharing on platforms such as Google Meet or Zoom. For free support, my experience in India suggests that the support team requires more training as some are still not fully ready or aware of all Salesforce Sales Cloud features. They need better training, but generally, the support is good and responsive..”

**Kamal Deep**

Founder and Salesforce Consultant at SaaSnic

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# Other Advice

It's imperative to ensure data quality, as the effectiveness of the tool depends on it. Properly trained teams following best practices will find Salesforce Sales Cloud invaluable. For very small teams, cost might be a consideration. My rating for Salesforce Sales Cloud is seven. There are modern AI products that are now in the market offering better capabilities.

**NavinJacob**

CTO at Cipher7

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“I would recommend Salesforce for an enhanced revenue system, whole automation process, and CRM to lead management.

I'd rate the solution nine out of ten..”

**Renu Soni**

Senior Salesforce Developer at a transportation company with 201-500 employees

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“As a Salesforce Sales Cloud partner, we take care of Salesforce Sales Cloud projects. Both [Agentforce](#) and Salesforce Sales Cloud are available. We operate as a reseller and implementation partner. On a scale of 1–10, I rate Salesforce Sales Cloud an 8.5..”

**Kamal Deep**

Founder and Salesforce Consultant at SaaSnic

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the platform offers **robust functionalities and a comprehensive feature set** that effectively supports business operations. I have developed strong expertise in **navigating its capabilities, optimizing workflows, and leveraging its tools** to drive efficiency.

Overall, I would rate the solution **an eight out of ten** for its **versatility, user-friendly interface, and ability to streamline processes**, making it a valuable asset for business success.

**Sundus Ajmal**

AWS Cloud Engineer at Accenture

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“Forecasting in Salesforce involves analyzing conversion rates and probabilities set by the customer for each deal. For instance, if a positive pipeline is forecasted for six months to a year, you can predict the potential revenue for the upcoming quarter based on these probabilities. Additionally, historical data from previous years can help refine these forecasts. Immediate predictions rely on the current pipeline, while long-term forecasts use historical data to project revenue over the next few years.

Salesforce requires minimal maintenance because it handles infrastructure management itself. The primary maintenance tasks involve managing customizations, adding new users, and addressing evolving requirements, particularly in larger organizations. Other than these updates, Salesforce operates with little need for additional maintenance.

Salesforce can be costly, but it is highly recommendable if it aligns with your organization's needs.

Overall, I rate the solution an eight out of ten..”

**Rahul Rupela**

Manager Strategy and Consulting at Cybertech Systems and Software Limited

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“The integration capabilities of the Salesforce Sales Cloud, on a scale of one to ten, with ten being the hardest, I would rate around five.

“From my perspective, the main issues or main complexities with integration include large-scale data integration; when you have to do large volumes of data synchronization with external systems, Salesforce Sales Cloud can become an issue because of something called governor limits, which are rules that force you to divide the data into small chunks and small transactions.

“It's a very flexible solution; I can advise it for any company size. I don't have a preference; different companies will use it differently. The big companies will probably customize it more, but smaller companies will use more features because they are more flexible. It's mostly a question of negotiation of the license and selecting the right type of license for your company.

“Salesforce Sales Cloud is leading in the market, holding 25% market share, while the second player has 8%, which is Microsoft, the last time I looked at it.

“I rate Salesforce Sales Cloud eight out of ten..”

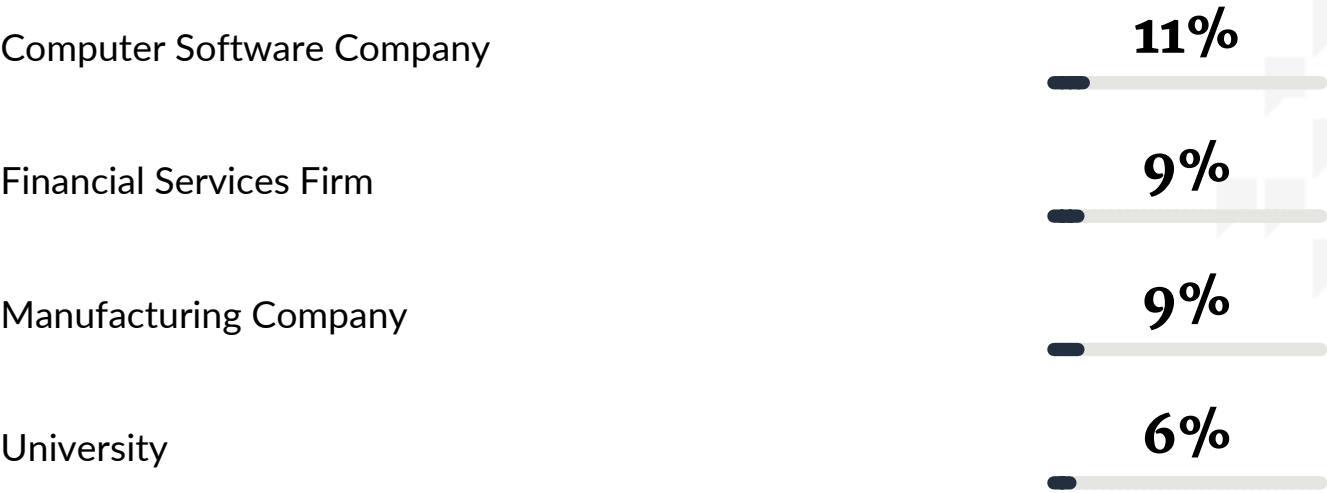
**Luís Silva**

Chief Technical Lead at a consultancy with 201-500 employees

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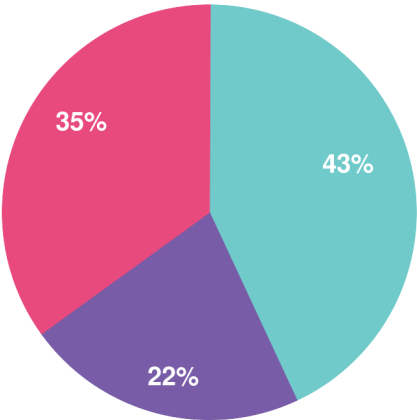
# Top Industries

by visitors reading reviews

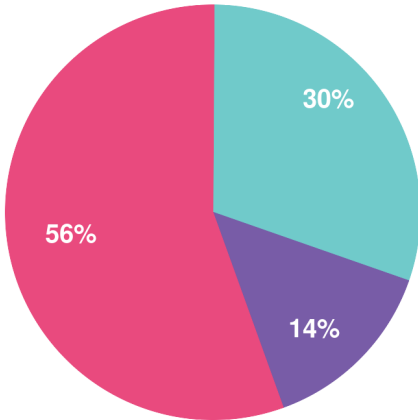


# Company Size

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Large Enterprise      Midsize Enterprise      Small Business

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