

Salesforce Product and Packaging Guide



Our commitment starts even before you're a customer by giving you insight into each of our products so that you can select the ones that will help your organization reach its goals faster. This guide will take you on a step-by-step journey to explain how our product portfolio is packaged for your business needs.

Of course, your account executive can help you at any step of the process and can explain any of this in more detail.

Step 1: Identify the right products for your organization.

The Salesforce Customer Success Platform is a set of industry-leading customer relationship management applications and services that enable your teams and departments to have a unified view of every customer experience. We help you deliver connected, intelligent, relevant engagement at scale across every customer touchpoint, from marketing to sales to ecommerce and service.



Our product offerings below are organized by specific business needs. First, identify which product offering(s) your team or department needs today:

 **Sales:** Sell smarter and faster, increase productivity, and maximize ROI with an end-to-end solution through Sales Cloud sales force automation, Einstein artificial intelligence, Pardot marketing automation, CPQ quoting and billing, and partner relationship management.

 **Service:** Transform service and deliver customer and employee success through Service Cloud customer and employee service, digital engagement's self-service support channels, and Field Service Lightning – all intelligently powered by Einstein artificial intelligence automation.

-  **Marketing:** Know your customer, personalize with intelligence, and engage across the journey through Marketing Cloud's applications, including Ad Studio, Mobile Studio, Advertising Studio, Data Studio, Journey Builder, and the Salesforce DMP.
-  **Commerce:** Grow revenue, extend inventory across channels, and deliver connected service by creating a unified and personalized experience for consumer shoppers or business buyers with Commerce Cloud, which includes comprehensive applications for B2C and B2B commerce, as well as Order Management.
-  **Engagement:** Provide a personalized experience that is built for each customer with Heroku. Deliver smart apps that surface your CRM data in new ways, and ensure customer trust remains strong with built-in security and compliance.
-  **Platform:** Deliver better customer experiences and improve productivity with the Lightning Platform and its wide-ranging capabilities, including process builder and Lightning flow, app builder, lightning object creator, custom branding tools, enterprise services, platform encryption, and connectivity.
-  **Integration:** Design, build, and manage a network of apps, data, and integrations – in the cloud or on premises – with the MuleSoft Anypoint Platform. Create seamlessly connected customer experiences, empower your organization to innovate faster, and unlock your enterprise data, leading to faster and better integrated experiences.
-  **Analytics:** Connect all your data to every role, industry, and business process with Einstein Analytics. Offering both out-of-the-box analytics templates, as well as a customizable analytics platform for all data sources, Einstein Analytics brings the benefits of "AI-powered" to everyone.
-  **Communities:** Build CRM-powered digital experiences and streamline business processes with Community Cloud's Digital Experience Platform, including partner relationship management, self-service, and custom digital experiences.
-  **Enablement:** Reinvent learning and enablement at your company with your own custom content and branding with myTrailhead. Onboard employees faster, supercharge productivity, increase Salesforce adoption, and cultivate company culture – all while making learning fun.
-  **Productivity:** Transform the way teams work together with Quip by deeply integrating documents, spreadsheets, and slides with real-time chat and Salesforce.
-  **Industries:** Access prebuilt solutions customized for specific industries, including financial services, healthcare and life sciences, government, and philanthropy.

Step 2: Select the right package of features for your needs.

Many of our products are broken down into various tiers, called **editions**, which bundle some of our most popular features together into easy-to-consume packages. This helps each organization identify the appropriate level of capabilities, and cost, for its needs.

The first step is to select the edition that works best for your base products, like Sales Cloud, Service Cloud, Marketing Cloud, and so on. The edition you choose determines which features will be included in your **org(s)**. An org represents a customer's specific version of Salesforce and all of its corresponding data. Each org can be highly customized, including custom fields, custom objects, workflows, data-sharing rules, Visualforce pages, and Apex coding.

There **can only be one edition in any one org at any moment in time**, so if your business needs change and you need additional features and capabilities, you are able to seamlessly upgrade to a higher edition. This allows you to grow with the Salesforce Platform over time.

For example, Sales Cloud and Service Cloud each have four editions, as detailed on the following page.

Essentials

Professional

Enterprise

Unlimited

Designed for small businesses that want to get started with a CRM system quickly. It includes intuitive walk-throughs and a setup assistant to get started, an easy-to-use UI, and administration tools to customize your deployment as you grow.

Ideal for businesses requiring full-featured CRM functionality. It includes straightforward and easy-to-use customization, integration, and administration tools to facilitate any small to midsize deployment.

Meets the needs of large and complex businesses. It gives you advanced customization and administration tools, in addition to all the functionality available in Professional Edition, which can support large-scale deployments. Enterprise Edition also includes access to Salesforce APIs, so you can easily integrate with back-office systems.

Maximizes your success and extends it across the entire enterprise through the Lightning Platform. It gives you new levels of platform flexibility for managing and sharing all your information on demand. Includes all Enterprise Edition functionality, Premier Support, full mobile access, unlimited custom apps, increased storage limits, and other features.

For more details on our package options, please refer to our pricing pages [here](#).

■ ■ ■ Step 3: Determine if any add-on products would be beneficial.

Add-ons are products that extend the capabilities of the core products in different ways.

For example: A customer purchases Sales Cloud to help transform their organization's sales team effectiveness. The customer then decides to add Salesforce CPQ, a configure-price-quote tool, to help the sales teams deliver contracts more effectively.

Add-ons help you create a custom solution that matches your organization's needs. This flexibility ensures you receive the right mix of technology and capabilities for your organization to reach its objectives.

Step 4: Understand how our products are priced.

Salesforce uses four set pricing models. Each product is assigned one of the models outlined below:

Priced Per User

We price per user per month when each unit of a SKU allows an individual user to access the technology. Each user has their own login. Common examples include **Sales Cloud and Service Cloud**.

Flat Fee Per Org

Each Salesforce org that uses these products pays a flat fee for use. Examples of this model are **Marketing Cloud Editions**.

Priced as a Percentage of Contract Value

Select products are priced based on how much you're spending with Salesforce, specifically, a percentage of your contract value. This is also called "derived pricing." These derived price products deliver functionality and services that make the underlying products more valuable. For example, the price of a **sandbox** environment is a percentage of what you pay for the products the sandbox supports, and the sandbox environment helps you make the most of your investment in other products.

Priced Per Planned Consumption

Lastly, certain products follow a usage-based pricing model where we price based on your planned consumption of the product. Examples of this include **Community Cloud logins, Marketing Cloud Super Messages, and storage**.

Our products and their editions are structured in a way to allow us to work together on a solution that both meets your needs and fits your budget.

Step 5: Get started.

To learn more about specific product editions, pricing, and more, please visit our pricing [webpage](https://www.salesforce.com/pricing) (salesforce.com/pricing), contact your account executive, or call us at 1-855-382-6558 (tel:18553826558).

For More Information

Contact your account executive to learn how we can help you accelerate your CRM success.

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