

Customisations every SMB Needs

Custom Fields and Page Layouts

Tailor objects like Leads, Opportunities, and Accounts with fields relevant to your business (e.g., industry type, lead source, renewal dates).

Why it matters: Helps users capture and view the most relevant data at a glance.

Custom Reports & Dashboards

Create real-time visual dashboards showing KPIs like sales pipeline value, lead conversion rate, and case resolution times.

Why it matters: Drives decision-making with visibility into performance.

Automation with Flow or Process Builder

Automate repetitive tasks like sending follow-up emails, creating tasks after a lead is converted, or updating status fields.

Why it matters: Saves time and reduces manual errors.

Lead Assignment Rules

Automatically assign leads to the right salespeople based on criteria like location, product interest, or industry.

Why it matters: Ensures faster response times and better lead nurturing.

Email Templates and Lightning Email Integration

Use branded, reusable templates and integrate your Outlook or Gmail inbox directly into Salesforce.

Why it matters: Boosts consistency and speeds up communications.

Validation Rules

Ensure data accuracy by enforcing field requirements (e.g., cannot close an opportunity without setting a close date).

Why it matters: Keeps your CRM clean and trustworthy.

Custom Opportunity Stages

Adapt the opportunity pipeline to reflect your real sales process (e.g., Prospecting > Demo > Quote > Negotiation > Closed Won).

Why it matters: Makes your pipeline easier to manage and forecast.

Related Lists & Custom Objects

Link important data together (e.g., track contracts, service history, or project timelines via custom objects).

Why it matters: Provides a 360° view of customer relationships.

Lightning App Pages

Create focused workspaces for different teams (e.g., sales, service, finance) using drag-and-drop layouts.

Why it matters: Improves usability and keeps teams focused on what matters.

Mobile Customisation

Ensure Salesforce is user-friendly on mobile by simplifying page layouts and enabling key workflows.

Why it matters: Empowers your field teams and remote workers.