



List: Top 20 Salesforce Sales Cloud RevOps Features

Salesforce's original platform, Salesforce Sales Cloud, offers many features for RevOps, sales / marketing, and Demand Generation.



No matter what you call it, when it comes to generating leads and closing revenue there are a number of useful tools in the core Salesforce product, as we covered in detail in our [Marketing on Salesforce without Marketing Cloud](#) guide.

Here are our top 18 included RevOps features in Salesforce, with 2 new AI features (extra \$) thrown in as a bonus.

1. Leads

Salesforce Leads are records of potential customers in Salesforce. They can be prospects who may or may not have shown interest, but aren't yet qualified.

2. Contacts

Salesforce Contacts are individuals at an Account, and what a Lead becomes when it is qualified and converted. Hopefully you have multiple contacts at each Account.

3. Accounts

Salesforce Accounts are the profiles of companies or organizations that your business interacts with. You can have multiple types of Accounts: customers, prospects, partners, competitors and more.

4. Opportunities

Salesforce Opportunities are Sales deals tracked through different stages of the sales pipeline. They can be won or lost, open or closed, an initial sale or an expansion opportunity.

5. Campaigns

Salesforce Campaigns track how marketing campaigns impact revenue, as well as analyze marketing ROI. Leads and Contacts can be assigned to multiple campaigns, including whether they responded or not.



6. Contact Roles

Salesforce Contact Roles identify the roles of Contacts involved in specific Opportunities. Define influencers, decision makers and more for each particular opportunity.

7. Campaign Influence

Salesforce Campaign Influence tracks how marketing campaigns impact opportunities and revenue. Different attribution models can be defined, including First Touch, equal weight, or Last Touch.

8. Web-to-Lead Forms

Salesforce Web-to-Lead captures lead information directly from your website forms into Salesforce. Choose from standard and custom fields and generate form code in minutes. See our [Ultimate Guide to Salesforce Web-to-Lead Forms](#) for more.

9. Email Templates

Salesforce Email Templates allow you to create formatted emails for easy communication with prospects and customers. Email templates can be sent by your sales and service users, as well as by automations in Salesforce.

10. Quick Text

Salesforce Quick Text are short canned responses that can save time in emails and chats. Quick Text is easy to add in Salesforce's communications workflow.

11. Email Integration

Salesforce Email Integration offers connections with email platforms like Outlook and Gmail. Users can view, edit, and add Salesforce records directly from their email, and relate their emails and events to Salesforce records.



12. Email to Salesforce

Salesforce Email-to-Salesforce gives you an email address that will automatically log inbound emails directly to Salesforce records, attaching emails to leads or contacts automatically. A similar feature for Service, Email to Case, creates support Cases from emails.

13. Mass Emails

Salesforce Mass Email allows you to send bulk emails to lists of leads or contacts. While limits on volume and deliverability make most companies choose 3rd party email tools, for certain applications Salesforce mass email can be useful.

14. Lead Assignment Rules

Salesforce Lead Assignment Rules allow you to automate the distribution of leads to the right sales reps based on criteria that you set.

15. Lead Auto-Response Rules

Salesforce Lead Auto-Response Rules allow you to send automated email responses based on your email templates when a new lead is created.

16. LinkedIn Lead Gen

Salesforce LinkedIn Lead Gen connects Salesforce to LinkedIn advertising forms, allowing you to map fields and automatically create new leads in Salesforce based on LinkedIn forms.

17. Reports and Dashboards

Salesforce Reports and Dashboards are powerful tools for analyzing and reporting on your organization's performance. Reports and Dashboards automatically show the latest data from Salesforce, eliminating the need to manually update spreadsheets.



18. Sales Forecasting

Salesforce Sales forecasting provides insight into projected sales, based on your team's open Opportunities. Opportunity amounts, target close dates and estimated likelihood of winning inform the pipeline forecast.

19. Einstein Lead Scoring

(New, additional cost)

Salesforce Einstein Lead Scoring uses AI to prioritize leads based on conversion likelihood, using your businesses lead conversion patterns that it detects using machine learning.

20. Agentforce Sales Development Representative (SDR)

(New, additional cost)

Salesforce's Agentforce SDR Agent can engage with prospects 24/7, answering basic questions and scheduling meetings based on CRM and external calendars.