



Tableau with Integrated Salesforce Databases Demo

August 2019

Tableau – Salesforce Demo Challenges and Solution

Customer Challenges

Leave data in Salesforce and integrate sales accounts, opportunities and contacts across multiple Salesforce databases and, in future, other enterprise data

SmartData Fabric® Solution

Leave data in Salesforce.com databases

Install SDF adapters on-premise, in data centers or on a Cloud, use third-party ODBC driver for Salesforce.com, profile data, address data quality and security, and build indexes

Configure and run MDM to obtain single sales account, opportunity and contact views of all data in Tableau and other apps

Use polling to obtain index and MDM updates

Include near real-time updateable pre-aggregated indexed views for performance, KPI monitoring and event processing

Access and integrate other enterprise data sources

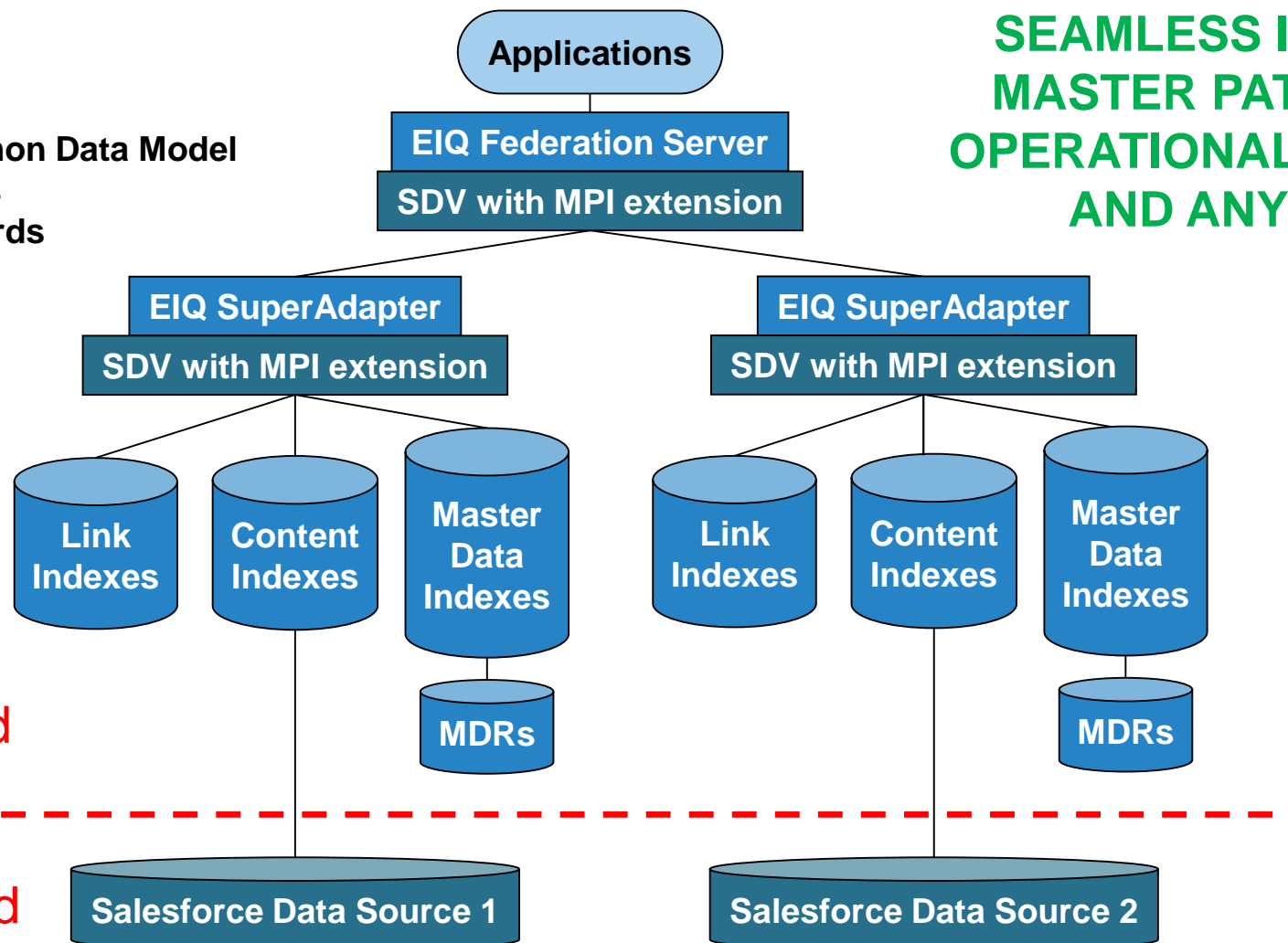
SDF Demo System Configuration

SDV = Standard Data View
aka Standard/Common Data Model
MDI = Master Data Indexes
MDRs = Master Data Records

**SEAMLESS INTEGRATION OF
MASTER PATIENT DATA WITH
OPERATIONAL/TRANSACTIONAL
AND ANY OTHER DATA**

On-premise, in data
centers or on a Cloud

Salesforce.com hosted



Map Data Source Fields to Standard Data View (SDV) (1 of 3)

WhamTech EIQ Server Management Console on <TrainingVM.corp.whamtech.com> (admin)

File Help

☐ Show all tables from all schemas
 ☐ Show indexed schemas
 ☒ Show indexed tables
 ☐ Show entity mapping

TrainingVM.corp.whamtech.com

 Programmability

 SF01_VDS

 Programmability

 SF01

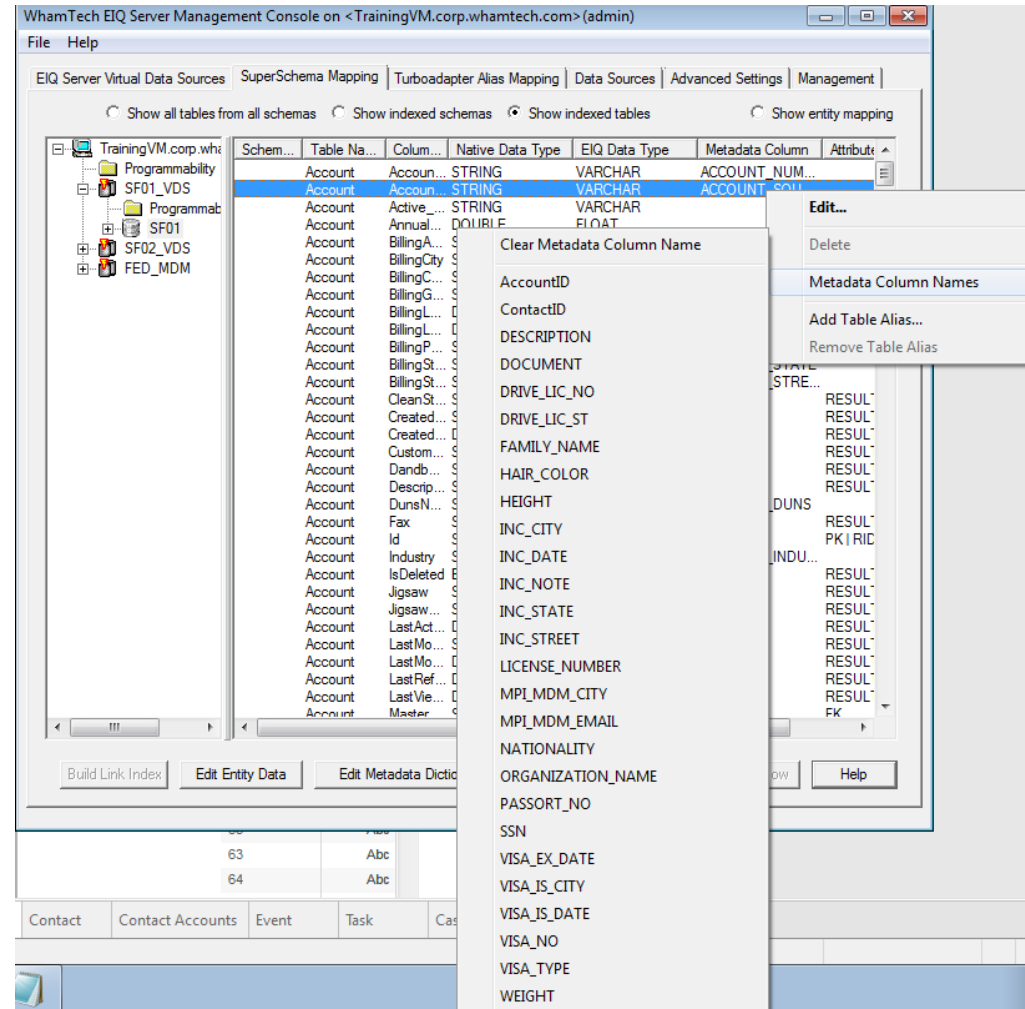
 SF02_VDS

 FED_MDM

Schem...	Table Na...	Colum...	Native Data Type	EIQ Data Type	Metadata Column	Attribute
Account	Account...	STRING	VARCHAR	ACCOUNT_NUM...		
Account	Account...	STRING	VARCHAR	ACCOUNT_SOU...		
Account	Active...	STRING	VARCHAR		RESULT	
Account	Annual...	DOUBLE	FLOAT		RESULT	
Account	BillingA...	STRING	CLOB		RESULT	
Account	BillingCity	STRING	VARCHAR	ACCOUNT_CITY		
Account	BillingC...	STRING	VARCHAR	ACCOUNT_COU...		
Account	BillingG...	STRING	VARCHAR		RESULT	
Account	BillingL...	DOUBLE	FLOAT		RESULT	
Account	BillingL...	DOUBLE	FLOAT		RESULT	
Account	BillingP...	STRING	VARCHAR	ACCOUNT_ZIPC...		
Account	BillingSt...	STRING	VARCHAR	ACCOUNT_STATE		
Account	BillingSt...	STRING	VARCHAR	ACCOUNT_STRE...		
Account	CleanSt...	STRING	VARCHAR		RESULT	
Account	Created...	STRING	VARCHAR		RESULT	
Account	Created...	DATETIME	TIMESTAMP		RESULT	
Account	Custom...	STRING	VARCHAR		RESULT	
Account	Dandb...	STRING	VARCHAR		RESULT	
Account	Descrip...	STRING	CLOB		RESULT	
Account	DunsN...	STRING	VARCHAR	ACCOUNT_DUNS		
Account	Fax	STRING	VARCHAR		RESULT	
Account	Id	STRING	VARCHAR		PK RID	
Account	Industry	STRING	VARCHAR	ACCOUNT_INDU...		
Account	IsDeleted	BOOLEAN	CHAR		RESULT	
Account	Jigsaw	STRING	VARCHAR		RESULT	
Account	Jigsaw...	STRING	VARCHAR		RESULT	
Account	LastAct...	DATE	DATE		RESULT	
Account	LastMo...	STRING	VARCHAR		RESULT	
Account	LastMo...	DATETIME	TIMESTAMP		RESULT	
Account	LastRef...	DATETIME	TIMESTAMP		RESULT	
Account	LastVie...	DATETIME	TIMESTAMP		RESULT	
Account	Master	STRING	VARCHAR		FK	

Build Link Index
 Edit Entity Data
 Edit Metadata Dictionary
 Topology
 Edit
 Save Now
 Help

Map Data Source Fields to Standard Data View (SDV) (2 of 3)



Map Data Source Fields to Standard Data View (SDV) (3 of 3)

WhamTech EIQ Server Management Console on <TrainingVM.corp.whamtech.com> (admin)

File Help

☐ Show all tables from all schemas
 ☐ Show indexed schemas
 ☒ Show indexed tables
 ☐ Show entity mapping

Schem...	Table Na...	Colum...	Native Data Type	EIQ Data Type	Metadata Column	Attribute
TrainingVM.corp.whi	Account	Accoun...	STRING	VARCHAR	ACCOUNT_NUM...	
	Account	Accoun...	STRING	VARCHAR	ACCOUNT_SOU...	
	Account	Active...	STRING	VARCHAR		RESUL
	Account	Annual...	DOUBLE	FLOAT		RESUL
	Account	BillingA...	STRING	CLOB		RESUL
	Account	BillingCity	STRING	VARCHAR	ACCOUNT_CITY	
	Account	BillingC...	STRING	VARCHAR	ACCOUNT_COU...	
	Account	BillingG...	STRING	VARCHAR		RESUL
	Account	BillingL...	DOUBLE	FLOAT		RESUL

SuperSchema Column Definition

Table Name: Account

Column Name: Active_c

Metadata Column Name:

Row Identifier

Key Type

AccountID
 ContactID
 DESCRIPTION
 DOCUMENT
 DRIVE_LIC_NO
 DRIVE_LIC_ST
 FAMILY_NAME
 HAIR_COLOR
 HEIGHT
 INC_CITY
 INC_DATE
 INC_NOTE
 INC_STATE
 INC_STREET
 LICENSE_NUMBER
 MPI_MDM_CITY

Build Link Index Edit Entry Data Edit Metadata Dictionary Topology Edit Save Now Help

Define Entities for Link Indexes™ and MDM

Create/Edit Entities

Create, edit or delete entities by selecting metadata columns as entity attributes. Link Indexes use the entity definitions for finding matching entities within and from across data sources in a federated system.

New Entity Delete Add/Edit ETDs Edit Metadata Dictionary OK

Entities:

Name	Description
ADDRESS	Address entity
CUSTOMER	
EMAIL	EMAIL ENTITY
PERSON	Person entity

Attributes:

Name	Description
LAST_NAME	

Metadata Columns:

Name	Description
ACCOUNT_C...	
ACCOUNT_C...	
ACCOUNT_D...	
ACCOUNT_I...	
ACCOUNT_N...	
ACCOUNT_N...	
ACCOUNT_P...	
ACCOUNT_S...	
ACCOUNT_S...	
ACCOUNT_S...	
ACCOUNT_Z...	
AccountID	
ACTIVITY_D...	
CAMPAIGN_...	
CAMPAIGN_...	
CAMPAIGN_...	
CAMPAIGN_...	
CAMPAIGN_...	
CAMPAIGN_...	
CASE_CLOSE...	
CASE_CLOSE	

Configure MDM for Salesforce Contact

Fuzzy matching rule for PERSON

Select Option

☒ Fuzzy Match ☐ Exact Match

Binning Attributes:

Name	Type	Binning	Matching token
LAST_NAME	VARCHAR	Yes	Metaphone

Metadata Columns:

Name	Description
ACCOUNT_C...	
ACCOUNT_C...	
ACCOUNT_D...	
ACCOUNT_I...	
ACCOUNT_N...	
ACCOUNT_N...	
ACCOUNT_P...	
ACCOUNT_S...	
ACCOUNT_S...	
ACCOUNT_S...	
ACCOUNT_Z...	
AccountID	
CAMPAIGN_...	
CAMPAIGN...	

Matching Attribute for MDM table:

Name	Weight Max	Weight Blank	Binning plus
LAST_NAME	25	10	Yes
FIRST_NAME	20	10	No
DOB	20	10	No
STATE	10	5	No
STREET	7	3	No
CITY	6	3	No
PHONENUMBER	10	5	No
EMAIL	20	15	No

Weight threshold for link: 50

Merge rule: Most recent timestamp

☒ Generate master data

Weight threshold for master data: 65

☒ Update master data schema automatically

OK Cancel

Configure MDM for Salesforce Account

Fuzzy matching rule for CUSTOMER

Select Option

☒ Fuzzy Match ☐ Exact Match

Binning Attributes:

Name	Type	Binning	Matching token
ACCOUNT_NAME	VARCHAR	Yes	Metaphone

Metadata Columns:

Name	Description
ACCOUNT_C...	
ACCOUNT_I...	
ACCOUNT_N...	
ACCOUNT_S...	
ACCOUNT_Z...	
AccountID	
CAMPAIGN_...	
CAMPAIGN_...	
CAMPAIGN_...	
CAMPAIGN_...	
CAMPAIGN_...	
CAMPAIGN_...	
CAMPAIGN_...	
CASE_CLOSE	

Matching Attribute for MDM table:

Name	Weight Max	Weight Blank	Binning plus
ACCOUNT_NAME	40	10	No
ACCOUNT_CITY	10	5	No
ACCOUNT_DUNS	30	15	No
ACCOUNT_PHONE	10	5	No
ACCOUNT_STATE	10	5	No
ACCOUNT_STREET	10	5	No

Weight threshold for link: 50

Merge rule: Most recent timestamp

☒ Generate master data

Weight threshold for master data: 75

☒ Update master data schema automatically

OK Cancel

Connect Tableau to SDF for Salesforce Data Source(s)

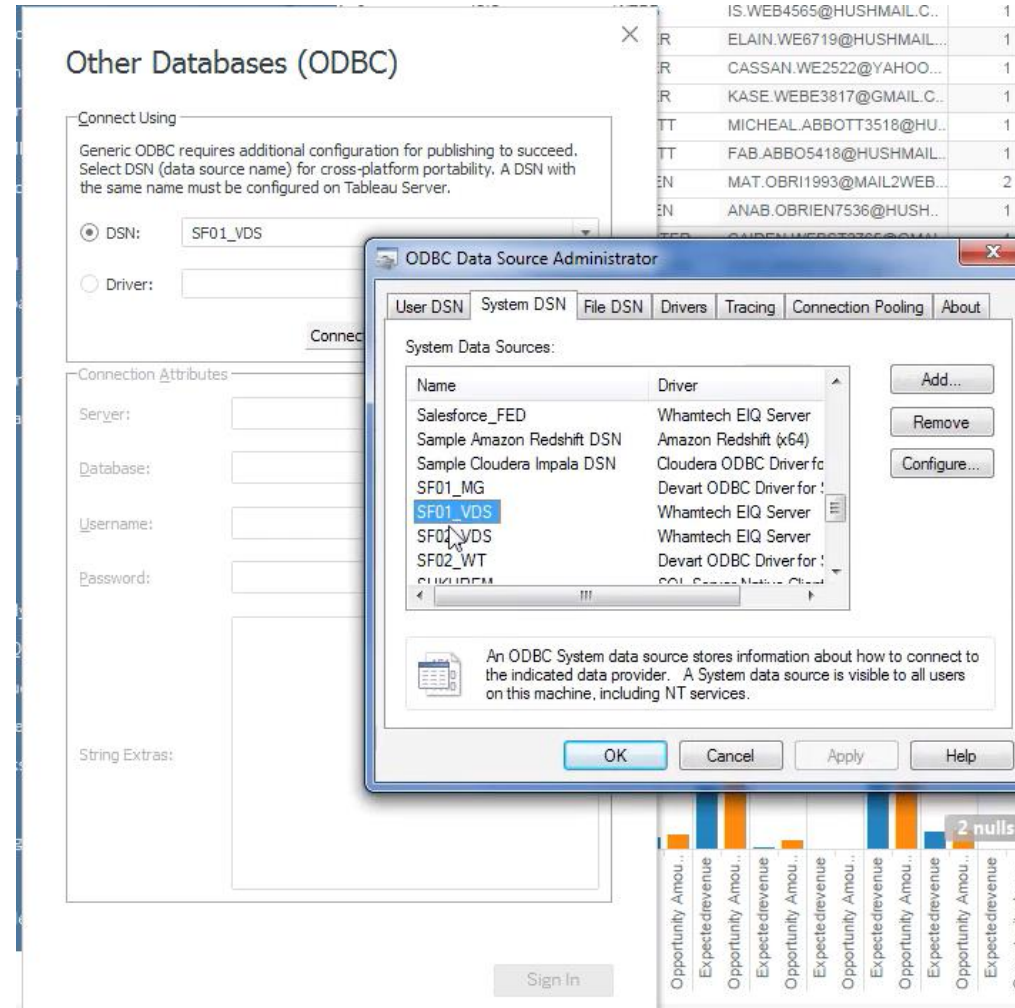




Tableau Selects SDF Standard Data View* for Salesforce Data Source(s)

ConnectionsAdd

192.168.10.103
Other Databases (ODBC)

Database

SF01_VDS

Schema

Select Schema

Table

Enter table name

ExactContainsStarts with

MyTable (SU...MA.MyTable)

New Custom SQL

MyTable (SUPERSHEMA.MyTable) (SF01_VDS)

Connection
LiveExtract

Filters
0Add

MyTable

Sort fieldsData source order

Show aliasesShow hidden fields

rows

Abc MyTable Data Source	Abc MyTable Account Number	Abc MyTable Account Source	Abc MyTable Account City	Abc MyTable Account Country	Abc MyTable Account Zipcode	Abc MyTable Account State	Abc MyTable Account Street	Abc MyTable Account Duns	Abc MyTable Account Industry	Abc MyTable Account Name	Abc MyTable Acco
-------------------------------	----------------------------------	----------------------------------	--------------------------------	-----------------------------------	-----------------------------------	---------------------------------	----------------------------------	--------------------------------	------------------------------------	--------------------------------	------------------------

Update Now

Automatically Update

Data Source

Account View

Contact Dashboard

Task

*Standard Data View (SDV) aka SuperSchema aka MyTable

Tableau Report: Salesforce Accounts Across Two Databases

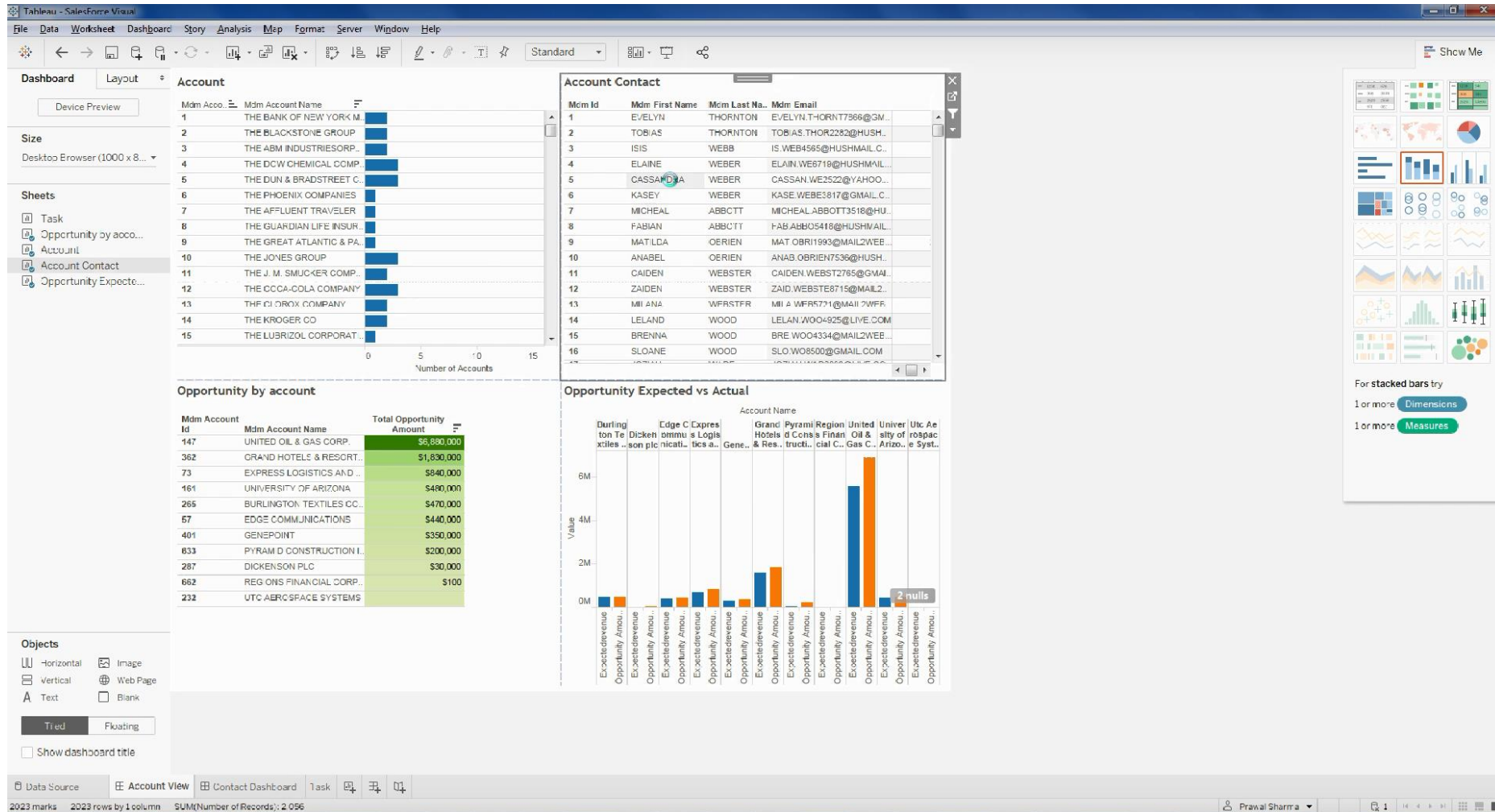




Tableau Report: Salesforce Accounts in One Database

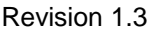


Tableau Report: Salesforce Accounts Across Two Databases Filtered by Contact

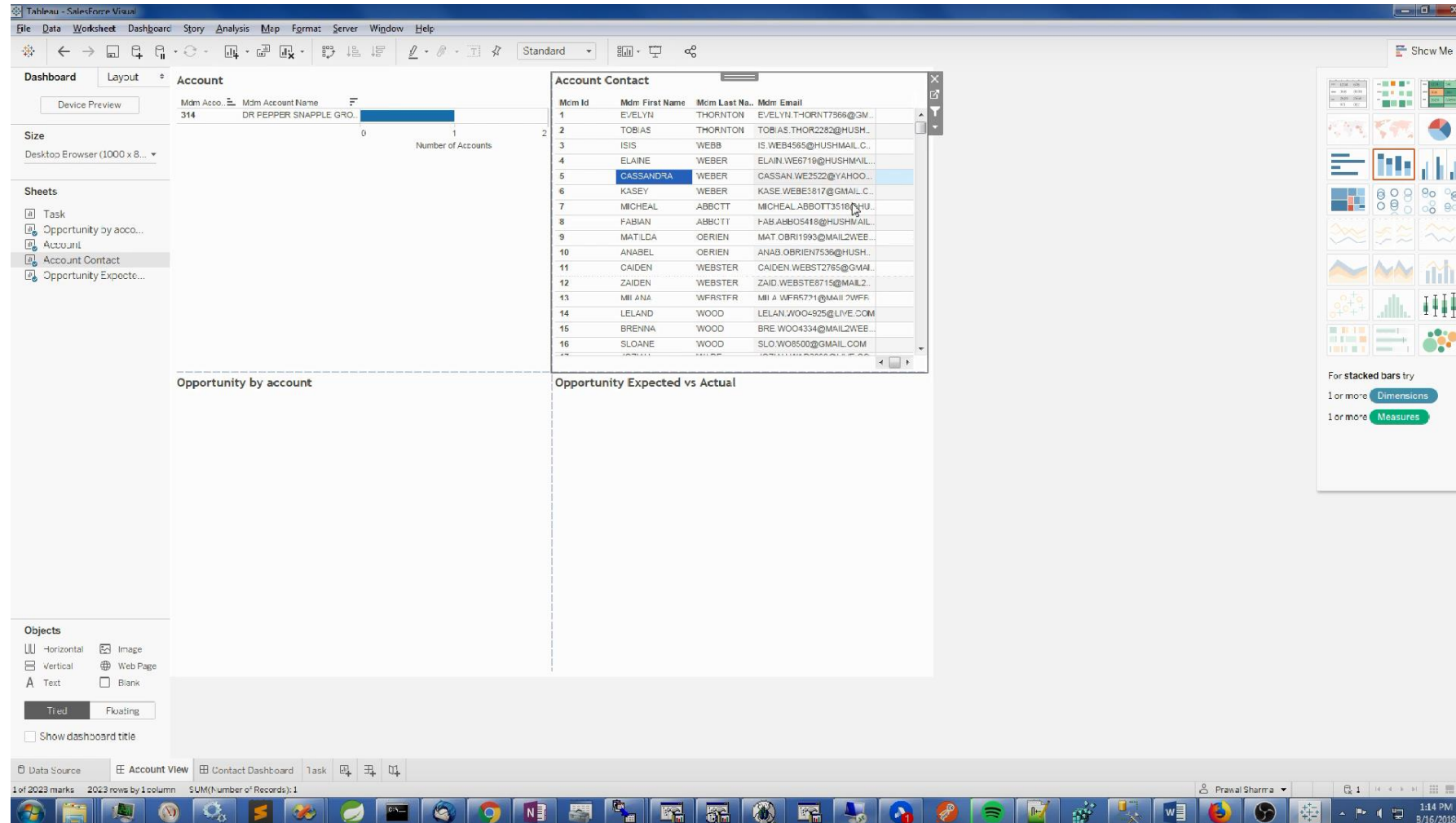
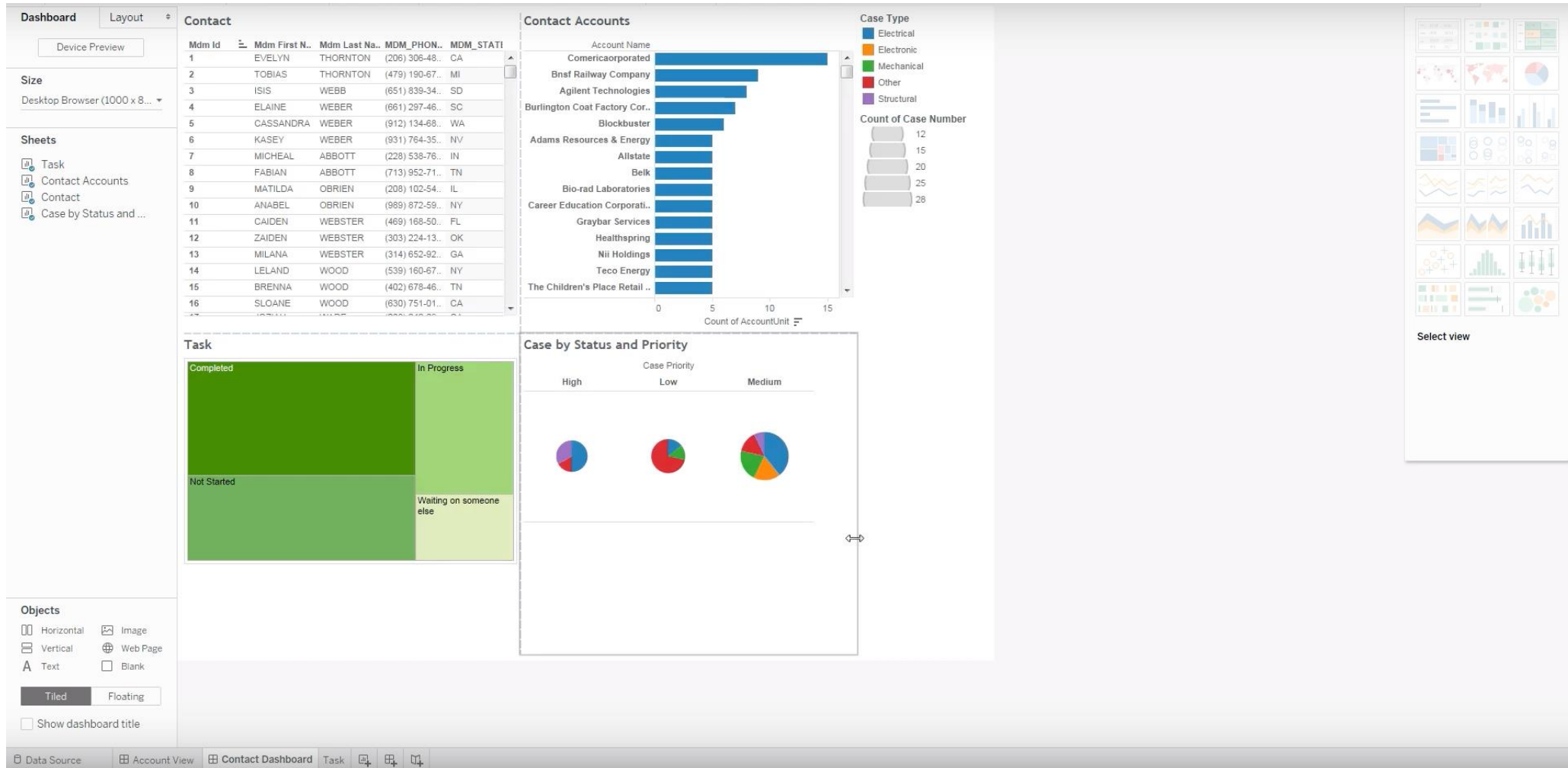


Tableau Report: Salesforce Contacts Across Two Databases





The End