

# 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<sup>®</sup> 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

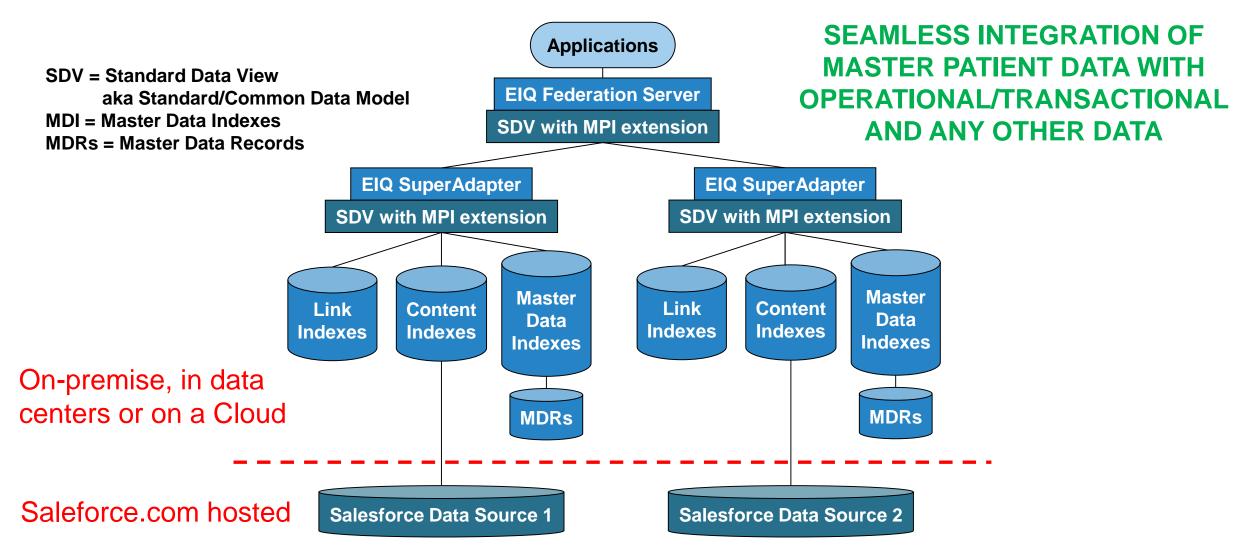
Use polling to obtain index and MDM updates

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





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

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

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

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### Define Entities for Link Indexes<sup>™</sup> and MDM

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

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\*Standard Data View (SDV) aka SuperSchema aka MyTable

🖯 Data Source 🖽 Account View 🖽 Contact Dashboard Task 🖳 🛱 👫



#### Tableau Report: Salesforce Accounts Across Two Databases

Dashboard Layout *	Account				Account	Contact		3	×	- 104. VN
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	14 THE KROGER C				14		WOOD	LELAN.W004925@LIVE.COM		
	15 THE LUBRIZOL (	ORPORAT		-	15	BRENNA N	WOOD	BRE WOO4334@MAIL2WEE		
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### Tableau Report: Salesforce Accounts in One Database

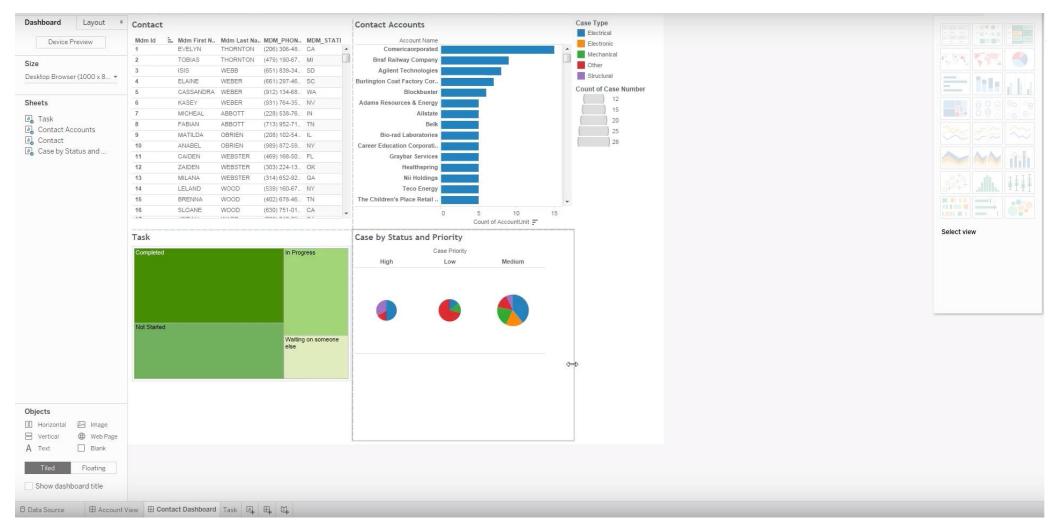
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		5	THE DUN & BRADSTREET C			11	CAIDEN	WEBSTER	CAIDEN.WEBST2765@GMAI	
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		7	THE AFFLUENT TRAVELER			14	LELAND	WOOD	LELAN.WOO4925@LIVE.COM	
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Opportunity by account		9	THE GREAT ATLANTIC & PA			16	SLOANE	WOOD	SLO.WO8500@GMAIL.COM	
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		13	THE CLOROX COMPANY			28	KARLY	ODONNELL	KA.ODONNELL5146@YAHO	
		15	THE LUBRIZOL CORPORATI.			30	ZAYDEN	WOODARD	ZAYD.WOO1036@GMAIL.C.	
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#### Tableau Report: Salesforce Accounts Across Two Databases Filtered by Contact

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#### Tableau Report: Salesforce Contacts Across Two Databases





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