Fivetran

Cheat sheet: Salesforce connector

Tips & tricks to start integrating your CRM data

Capturing customer intel from your CRM.

Salesforce is highly trusted by organizations across diverse industries to hold customer relationship information. It's flexible and customizable, which can make its data difficult to extract and ingest.

Fivetran's Salesforce connector offers the following features to jumpstart your analysis:

History Mode
Enable History Mode to capture a complete picture of your data as it's changed over time.

Pro tip: History Mode for Salesforce is available at the table level, meaning you can keep historical data where you need it and save rows where you don't.

Data Blocking
Avoid exposing sensitive information by omitting it from replicating to your destination.

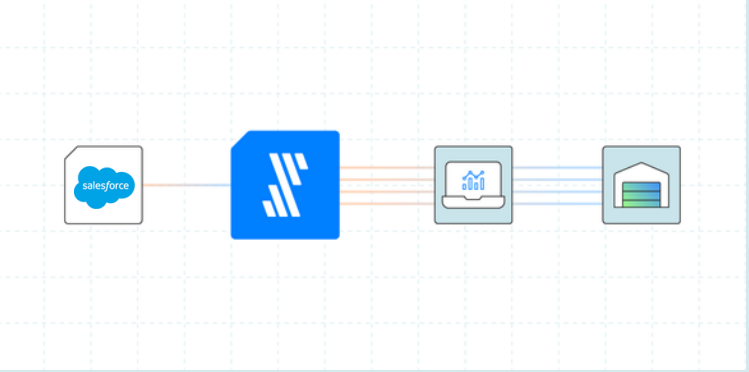
Pro tip: Data Blocking for Salesforce is available at the table and column level, enabling you to conserve computing and storage space by excluding unneeded information from your destination.

Column Hashing
Anonymize PII in your destination by hashing columns containing sensitive data.

Pro tip: Use column hashing for instances where it's important to retain your data's analytical value and allow for data joins.

Where Does Fivetran Fit In?

Fivetran has natively built, zero-configuration connectors with over 200+ tools so that you can effortlessly and reliably extract all of the data from your CRM, support tools and more.



When you move Salesforce data with Fivetran, you can rest assured that your pipeline is in good hands. In fact, Fivetran is trusted by more than 1,500 organizations to manage their Salesforce data integration.

In addition to the special features outlined on the previous page, Fivetran's Salesforce connector comes fully managed and equipped to handle...

- Automatic schema migration
- Change data capture
- Job specific API calls
- Custom object syncs
- Fivetran Transformations
- Streamlined loading to Snowflake

> "It gives you leverage to get more work done out of the same data team and that really benefits the rest of the organization and increases agility."
>
> **John Huang**
> Head of Data, Lob

Syncs & Efficiency

Our Salesforce connector is built to maximize the efficiency of your API pulls. Each Salesforce account has a rolling quota of API pulls that resets every 24 hours. Fivetran's Salesforce connector detects when an account has used 90% of their API quota and automatically reschedules syncs by one hour, ensuring you always have API quota remaining for your other business-critical operations.

We use two strategies to maximize your sync efficiency:

Sync Type	Bulk API	REST API	Sync Strategy
Initial	X		The Bulk API is used for your initial, historical sync. We use multiple techniques to specifically minimize your Bulk API calls, as Salesforce limits these calls.
Incremental	X	X	We use a combination of the Bulk & REST API for incremental syncs, depending on the volume of data and number of updated records since the last sync.

Historical Tracking:

History Mode is an optional setting available at the table level within the Salesforce schema. History Mode provides additional functionality to its tables, maintaining a log of each version of a record as it's changed over time. Due to the nature of this feature, it's important to note that History Mode does increase MAR. Because this function is available at the individual table level, you can pick and choose where your historical data will be the most impactful and where you can go without.

These three tables are our most popular tables for Historical Tracking:

OPPORTUNITY_CHANGES	Track changes made to opportunities over a period of time to gain an in-depth understanding of your sales cycle.
ACCOUNT_GROWTH	Track changes to plans and usage over time, so you have information about whether an account is growing or reducing in usage.
HISTORY_OF_BOOKINGS	Gain an understanding of bookings and cancellations. Prior to History Mode, you would lose information about the number of bookings that were canceled.

Fivetran Transformations for dbt Core

Fivetran Transformations for dbt Core* helps your business accelerate analytics. dbt Core, by dbt Labs, is an industry-leading, open-source transformation tool. Fivetran users have exclusive access to dozens of dbt Core modeling solutions, specifically curated to transform your Salesforce data into analytics-ready data models.

Source Data Models for Salesforce

Our Source data models for Salesforce contain staging models that work on their own or in tandem with the Salesforce Transform data models, to enrich your Salesforce data in **three main ways:**

1. Removes rows that are soft deleted
2. Provides descriptions for all columns
3. Names the columns consistently across all data models
    a. Boolean fields are prefixed with is_ or has_
    b. Timestamps are appended with _at
    c. ID primary keys are prefixed with the name of the table
        i. For example, the user table's ID column is renamed user_id

Install these models →

Transform Data Models for Salesforce

Our Transform data models for Salesforce work with our Source data models to further enable users to better understand their sales funnel and team performance with **four data models:**

MODEL	FUNCTION
SALESFORCE_ MANAGER_ PERFORMANCE	Sales team bookings, losses, and win percentages.
SALESFORCE_OWNER_ PERFORMANCE	Individual rep bookings, losses, and win percentages.
SALESFORCE_SALES_ SNAPSHOT	Single row snapshot of your sales funnel.
SALESFORCE_OPPORTUNITY_ ENHANCED	Opportunities with related account and owner.

Install these models →

Supported destinations:

snowflake Google Big Query amazon REDSHIFT

Fivetran Transformations for dbt core

Quickstart data models
And now you can download, orchestrate, and manage our Source, Transform, and Formula Fields Salesforce dbt data models right from the Fivetran platform with Quickstart data models. This approach is all clicks, no dbt project, coding, or 3rd party tools required.

Easily transform Opportunities, Accounts and Leads into ARR, NRR, and New Business Bookings reports and calculate any custom KPIs held in your Formula Fields. Learn more.

Download them today

Formula Fields

The Salesforce API has limitations that cause outdated or missing formula field values in your destination. Our Salesforce Formula Fields data models solve for this, with macros that work together to translate all your formula/custom/lookup fields enabled in Salesforce, and generates views with fresh formula field values.

The Fivetran Formula Table + Salesforce Formula Utils Data Models

Within the Salesforce Schema, you'll find the fivetran_formula_model table - a free system table that won't accrue any MAR.

The fivetran_formula_model table is used to calculate reliable and up to date custom field values as views in your destination.

Objects in the fivetran_formula_model table are displayed with their table name and full SELECT statement for each model, including the standard fields and the logic to recreate the formula field.

The fivetran_formula_model table maintains an up to date record of all your custom formulas, without the need to track down their definitions from your Salesforce admin.

Install these models →

Example

`SALESFORCE.FIVETRAN_FORMULA_MODEL`

Object	Model
contacts	Select id, company_name, first_name, last_name, contact(contact(first_name, ' '), last_name) as full_name FROM contacts

`SALESFORCE.CONTACTS`

ID	Company Name	First Name	Last Name
abcdefg	Daily Planet	Clark	Kent
hijklmno	Daily Planet	Lois	Lane

`SALESFORCE_VIEWS.CONTACTS`

ID	Company Name	First Name	Last Name	Full Name
abcdefg	Daily Planet	Clark	Kent	Clark Kent
hijklmno	Daily Planet	Lois	Lane	Lois Lane

In this example, the Salesforce administrator has enabled a formula field in their Contacts table, called full_name. This field is calculated by combining the first_name and last_name fields.

We see this information in the salesforce.fivetran_formula_model table, with contacts as the object name alongside its SELECT statement, which includes the standard source fields and the logic used to recreate the formula field.

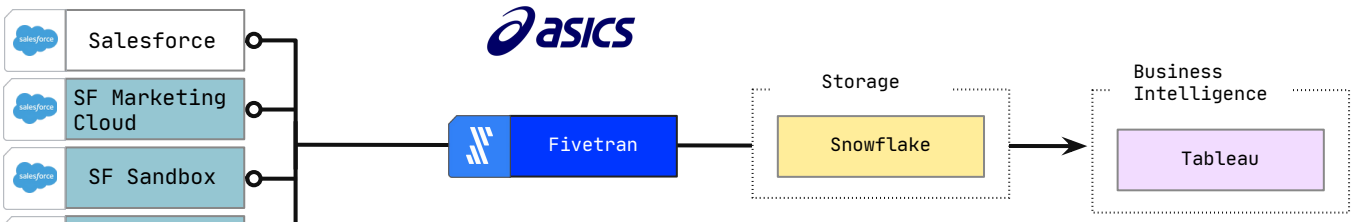
Our Salesforce Formula Utils data models then use the SELECT statement from the fivetran_formula_model table to create a view in the destination called salesforce_views.contacts.

We see in the view titled salesforce_views.contacts, that the full_name formula field has been added to the salesforce.contacts table, and is now populated with accurate values.

The Journey Doesn't Stop at Salesforce Data!

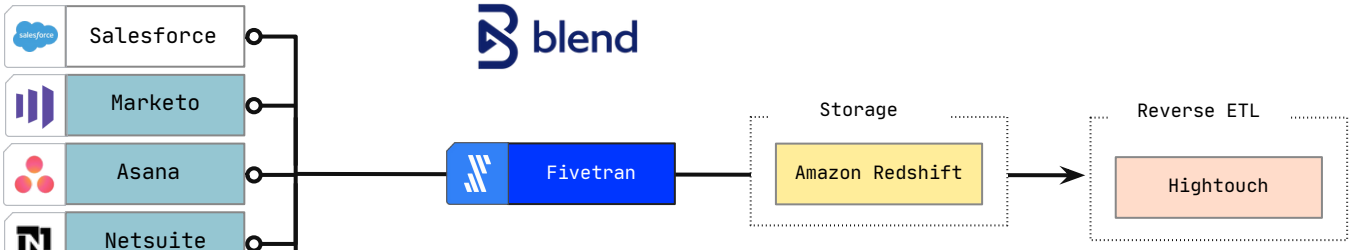
Once your CRM data is centralized and transformed, its true value comes with the ability to analyze this data alongside the rest of your customer data. Stack your data stack with every customer touch-point so you can visualize each step in your customer journey.

Check out how these companies are using their Salesforce data:



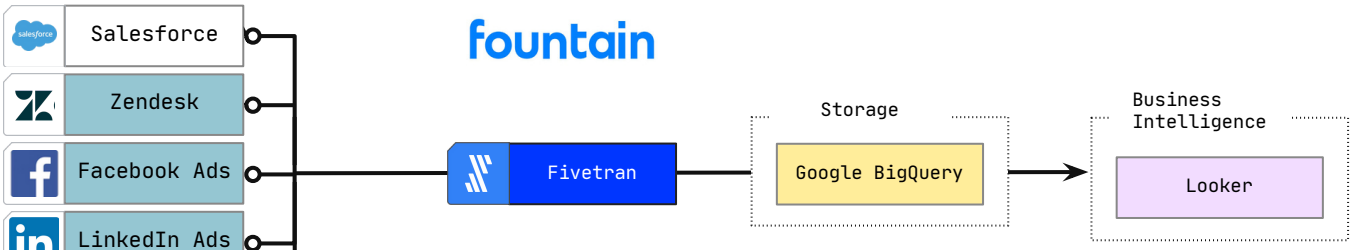
"While some apps, like Salesforce, have reports right out of the box, they tend to be difficult to maintain and deploy and not very user-friendly. With the data centralized, we can do more with it and combine it with product data for product development."
- Atul Parasnis, Senior Manager of Data Engineering, Asics

Read the full story →



"The value of Fivetran isn't any one individual connector – the value is being able to pull in Salesforce, Marketo, Asana, NetSuite and Lever, and blend the data from historically separate departments together for analysis. With Hightouch we can then push it out to make sure that everyone's looking at the same metrics."
- William Tsu, Customer Success Operations, Blend

Read the full story →



"If we didn't have Fivetran I think we'd be limited to pretty much customer success analytics through Zendesk or Salesforce. But because we have it, we can do a lot of product analytics and even some engineering analytics through Github. Fivetran has expanded the realm in which we can report and do analysis that we wouldn't have been able to do otherwise."
- Mark Schindler, Product Manager at Fountain

Read the full story →

If you're a current customer, visit your dashboard to set up a connector today, and enjoy 14 days of free use! If you're considering Fivetran for your ETL needs, sign up for a free trial.