



Business reporting and technical infrastructure

E-commerce compliance focused legal firm

- Helped build a single platform product with Salesforce as front-end and Azure in the back-end
- Created multiple executive dashboards in Tableau CRM that were embedded in Salesforce to provide seamless user experience
- Built the Azure back-end for complete data ingestion and transformation of data to power the Tableau CRM dashboards

Law firm needs a balanced business reporting and data infrastructure

Picture this...

You're looking to streamline and automate the reporting processes, and develop a Salesforce-based interface that encompasses all the dashboards/reports along with Salesforce data, to provide consistent and accurate information to their customer brands

You turn to Accordion.

We partner with your team to help in building a single platform product with salesforce as front-end and azure in the back-end, including:

- 1) Analyzing and rationalizing 60 Power BI dashboards/reports to ~10 Tableau CRM dashboards, for monitoring sellers across marketplaces, embedding Tableau CRM dashboards in Salesforce and Salesforce community pages for better user experience
- 2) Creating datasets and recipes by identifying common keys between data flowing from Azure Synapse (scraping data from marketplaces, Amazon Seller/Vendor Central, X-Byte, Pattern etc.), and transactional data present in Salesforce and using the harmonized dataset to populate the Tableau CRM dashboards
- 3) Developing an Azure Data Lake with Delta Lake overlay for ingestion and transformation of data from multiple data sources and making the final data available in Azure synapse SQL for reporting
- 4) Developing RPA processes to automate data ingestion from Amazon Seller/Vendor Central, which is currently downloaded manually and not reported consistently

Your value is enhanced.

- You have an integrated experience for users within Salesforce environment through embedded Tableau CRM dashboards, for monitoring as well as all CRM related activities
- You have optimized the performance of the dashboards and improved scalability of the solution by handling data processing intensive tasks in the Azure back-end
- You have improved processing time and reduced costs, by integrating both Salesforce data and Azure directly in Recipe, to enable more dynamic dashboards

KEY RESULT

- Impact 1...
- Impact 2...

VALUE LEVERS PULLED

- Integrating Tableau CRM dashboards in Salesforce
- Azure Data Lake and Azure Synapse SQL
- Robotic Process Automation

Integrated data management and reporting using Salesforce & Azure architecture

Situation

- High level of manual efforts and inconsistencies in data, for dashboards and reports that client was generating for customer brands, to provide insights into monitoring and control services for brands
- We partnered with the client to streamline and automate the reporting processes, and develop a Salesforce-based interface that encompasses all the dashboards/reports along with Salesforce data, to provide consistent and accurate information to their customer brands

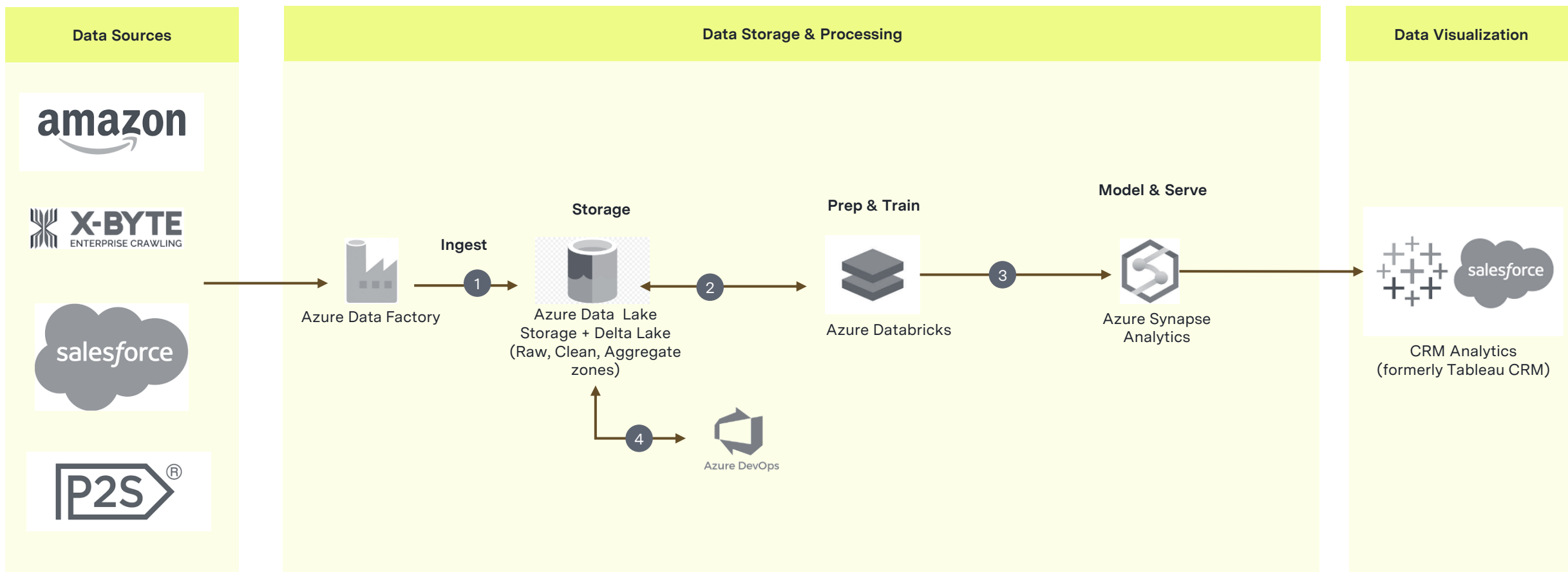
Accordion Value Add

- Analyzed and rationalized 60 Power BI dashboards/reports to ~10 Tableau CRM dashboards, for monitoring sellers across marketplaces. These Tableau CRM dashboards were embedded in Salesforce and Salesforce community pages for better user experience.
- Created datasets and Recipes by identifying common keys between data flowing from Azure Synapse (scraping data from marketplaces, Amazon Seller/Vendor Central, X-Byte, Pattern etc.), and transactional data present in Salesforce. The harmonized dataset is used to populate the Tableau CRM dashboards
- Developed an Azure Data Lake with Delta Lake overlay for ingestion and transformation of data from multiple data sources and make the final data available in Azure synapse SQL for reporting.
- Developed RPA processes to automate data ingestion from Amazon Seller/Vendor Central, which were previously manually downloaded and were not reported on consistently

Impact

- Provided an integrated experience for users within Salesforce environment through embedded Tableau CRM dashboards, for monitoring as well as all CRM related activities
- Optimized the performance of the dashboards and improved scalability of the solution by handling data processing intensive tasks in the Azure back-end
- Improved processing time and reduced costs, by integrating both Salesforce data and Azure directly in Recipe, to enable more dynamic dashboards

Integrated data management and reporting using Salesforce on Azure



- 1 Collate and ingest data from data sources using Azure Data Factory to the Azure Data Lake (Raw Tables – Bronze)
- 2 Consolidate and harmonize the data and push the data into Refined Tables (Silver) and finally into Aggregate Tables (Gold)
- 3 Develop data models in Databricks and Delta Lake, and build operational reports and analytical dashboards on top of Azure Synapse to derive insights from the data
- 4 Azure DevOps – Version Control (GitHub), Code Repository System and for CI/CD implementation for Dev/QA, Prod environments