

Salesforce data backfilling

E-Commerce compliance focused legal firm

We developed a streamlined/ automated process to bulk seed the required data into various salesforce objects just by dropping an excel file into a blob. This helped drastically reduce the seeding time and removed manual seeding errors.

E-commerce compliance focused legal firm needs salesforce data backfilling

Picture this...

You’re looking for an Azure based dynamic pipeline that encompasses above issues while seeding the Salesforce data

You turn to Accordion.

We partner with your team to develop a streamlined/ automated process to bulk seed the required data into various salesforce objects just by dropping an excel file into a blob. This helped drastically reduce the seeding time and removed manual seeding errors, including:

- 1) We have analyzed the various Salesforce objects and their dependencies, and developed a process flow to ensure the data is properly seeded according to the hierarchy of the Salesforce objects. This will help ensure that the data is accurate and can be effectively used by the team
- 2) Created a single pipeline to seed the data into the Salesforce, without manual effort with high quality data in Salesforce.
- 3) Removed dependency on a third party, a Salesforce developer service provider, towards data seeding

Your value is enhanced.

Your client can leverage the same pipeline for seeding data for multiple products, as the process is well defined leading low maintenance. You have automated the process, reduced manual effort, high quality data in the Salesforce which improved the quality of the data in the dashboards driven by the automation seeding time is reduced to just 15 minutes from 10 hours.

SALESFORCE DATA BACKFILLING

KEY RESULT

- 15 minutes from 10 hours seeding time is reduced.

VALUE LEVERS PULLED

- Lever 1
- Lever 2
- Lever 3

Salesforce data seeding automation through azure

Situation

- A manual effort of more than 10 hours was required to seed the data into the Salesforce objects whenever the client onboarded new customers. Since the process is manual, data lineage and data redundancy is high impacting the downstream dashboards.
- Client needed to move away from a Python based process that was error prone to a more streamline process to back fill the Salesforce source with data
- We partnered with client to streamline and automate the seeding process by creating an Azure based dynamic pipeline that encompasses above issues while seeding the Salesforce data

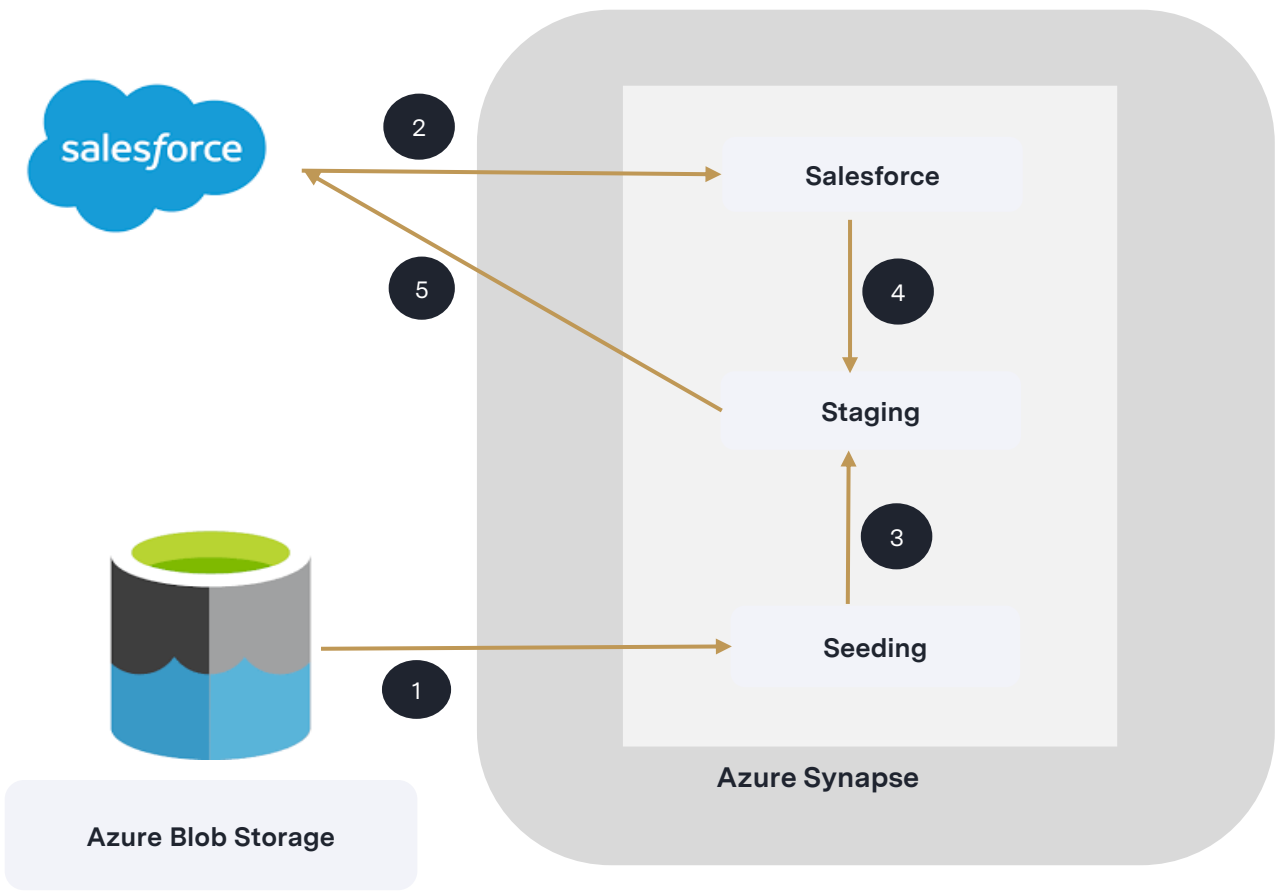
Accordion Value Add

- We have analyzed the various Salesforce objects and their dependencies, and developed a process flow to ensure the data is properly seeded according to the hierarchy of the Salesforce objects. This will help ensure that the data is accurate and can be effectively used by the team
- Created a single pipeline to seed the data into the Salesforce, without manual effort with high quality data in Salesforce.
- Removed dependency on a third party, a Salesforce developer service provider, towards data seeding

Impact

- Client can leverage the same pipeline for seeding data for multiple products, as the process is well defined leading low maintenance
- Automated the process, reduced manual effort, high quality data in the Salesforce which improved the quality of the data in the dashboards
- Driven by the automation seeding time is reduced to just 15 minutes from 10 hours.

Azure <> salesforce integration



1 Data from the Seeding file in Blob storage will be uploaded into the SQL tables in Synapse.

2 Data for the required objects in Salesforce will be synced to the tables with Salesforce Schema

3 Data from the seeding file will be breakdown into the different objects based on the Object model. These tables will be stored with Staging schema.

4 Lookup is performed on the Staging tables to identify the new or updated records over the data present in the Salesforce objects. This will delete the data from the Staging tables that is already present in the Salesforce objects.

5 Data from the Staging tables will be inserted/ upserted into the Salesforce objects.

Azure salesforce integration

