**Salesforce Query**

let

Source = Salesforce.Data("https://sjg.my.salesforce.com/", [ApiVersion=48]),

Lead1 = Source{[Name="Lead"]}[Data],

#"Filtered Rows" = Table.SelectRows(Lead1, each [CreatedDate] >= #datetime(2021, 9, 1, 0, 0, 0)),

#"Merged Queries" = Table.NestedJoin(#"Filtered Rows", {"Id"}, Account, {"Lead\_ID\_\_c"}, "Account", JoinKind.LeftOuter),

#"Expanded Account" = Table.ExpandTableColumn(#"Merged Queries", "Account", {"Id", "MasterRecordId", "Type", "Lead\_ID\_\_c"}, {"Account.Id", "Account.MasterRecordId", "Account.Type", "Account.Lead\_ID\_\_c"}),

#"Merge Opportunity" = Table.NestedJoin(#"Expanded Account", {"Account.Id", "Id"}, Opportunity, {"AccountId", "LeadID\_\_c"}, "Opportunity", JoinKind.LeftOuter),

#"Expanded Opportunity1" = Table.ExpandTableColumn(#"Merge Opportunity", "Opportunity", {"StageName", "Type"}, {"Opportunity.StageName", "Opportunity.Type"}),

#"Removed Other Columns" = Table.SelectColumns(#"Expanded Opportunity1",{"CreatedDate", "Service\_Address\_Line\_1\_\_c", "Service\_Address\_Line\_2\_\_c", "How\_did\_they\_hear\_about\_us\_\_c", "Details\_\_c", "Service\_City\_\_c", "Service\_Zip\_Code\_\_c", "How\_did\_they\_contact\_us\_\_c", "Service\_State\_\_c", "Sub\_Category\_\_c", "UTM\_Source\_\_c", "UTM\_Medium\_\_c", "UTM\_Term\_\_c", "UTM\_Campaign\_\_c", "Created\_By\_Name\_\_c", "Lead\_ID\_\_c", "Opportunity.StageName", "Opportunity.Type"}),

#"Renamed Columns" = Table.RenameColumns(#"Removed Other Columns",{{"Opportunity.Type", "OpportunityType"}, {"Opportunity.StageName", "Stage"}, {"UTM\_Term\_\_c", "Term"}, {"UTM\_Campaign\_\_c", "Campaign"}, {"UTM\_Medium\_\_c", "Medium"}, {"Details\_\_c", "Details"}, {"CreatedDate", "Date"}, {"Service\_Address\_Line\_1\_\_c", "AddressLine1"}, {"Service\_Address\_Line\_2\_\_c", "AddressLine2"}, {"Service\_City\_\_c", "City"}, {"Service\_Zip\_Code\_\_c", "ZipCode"}, {"How\_did\_they\_contact\_us\_\_c", "ContactType"}, {"Service\_State\_\_c", "State"}, {"Sub\_Category\_\_c", "SubCategory"}, {"UTM\_Source\_\_c", "Source"}, {"Created\_By\_Name\_\_c", "CreatedBy"}, {"Lead\_ID\_\_c", "LeadID"}, {"How\_did\_they\_hear\_about\_us\_\_c", "ReferralType"}}),

#"Filtered Rows1" = Table.SelectRows(#"Renamed Columns", each [CreatedBy] = "Vinette Crowley" or [CreatedBy] = "Theresa Rhodes" or [CreatedBy] = "Michael Paine" or [CreatedBy] = "Marie LeBrasseur" or [CreatedBy] = "Monica Stevenson" or [CreatedBy] = "Christopher Smith"),

#"Changed Type" = Table.TransformColumnTypes(#"Filtered Rows1",{{"Date", type date}})

in

#"Changed Type"

Graphical user interface, text, application

Description automatically generated

**Opportunity query**

let

Source = Salesforce.Data("https://sjg.my.salesforce.com/", [ApiVersion=48]),

Opportunity1 = Source{[Name="Opportunity"]}[Data],

#"Removed Other Columns" = Table.SelectColumns(Opportunity1,{"Id", "AccountId", "StageName", "Type", "Lead\_ID\_\_c", "LeadID\_\_c"})

in

#"Removed Other Columns"

**Account query**

let

Source = Salesforce.Data("https://sjg.my.salesforce.com/", [ApiVersion=48]),

Account = Source{[Name="Account"]}[Data],

#"Removed Other Columns" = Table.SelectColumns(Account,{"Id", "MasterRecordId", "Type", "Lead\_ID\_\_c"})

in

#"Removed Other Columns"