On-Demand Training: Connecting to Salesforce Transcript

Welcome to this training video on the Tableau Salesforce connector. Follow along by using your own copy of Tableau Desktop and Salesforce instance.

Connecting to Salesforce Data

Tableau connects natively to dozens of data sources, including Salesforce.com CRM data.

In the Connect to Data screen, select the Salesforce connector.

- Enter the user credentials and the Salesforce Server URL.

    - Depending on how the Salesforce instance is set up, this may require an access token, requested from Salesforce, in order to connect to the data.

    - If this is the case, request a token, and append it to the end of the Salesforce password in the credentials dialogue here.

- We must make sure that the Salesforce account used has the BULK Salesforce API enabled and Salesforce administrative privileges.

Once we've entered our credentials, we'll connect

Standard Connections are simple data sets built from Salesforce Objects, with predefined joins based upon the Salesforce database schema.

- These are commonly used combinations of Salesforce Objects, simplified in that Tableau can 'pre-write' the appropriate join clauses for us, as seen here.

- We are also able to connect to Single Table of all the Salesforce Object tables, including any Custom Objects that have been defined.

- Or we can select these tables and create joins between them by dragging out the appropriate tables.

Because Salesforce is so customizable, many organizations do not always use or give users access to certain fields that the Salesforce API deems "standard."

- This can cause errors to occur via the Standard Connections dialogue, usually with a "[Field Name] does not exist" error.

- In this case, we might use the Single Table connection option to select which object we'd like to use as our primary table.

- Then, if we want to join more tables to the primary, we'll drag out subsequent tables to the right of that table.

We'll give the connection a name for use in Tableau, and click Sheet 1.

Salesforce Data Extracts

Salesforce Data is automatically 'pulled' into Tableau's in-memory fast data engine as a Tableau Data Extract.

- This saves a local copy of the data on our machine in the default filepath for Tableau Datasources

- This is true of many cloud data sources, as application connections cannot persistently query the Salesforce

database.

- Data Extracts can be thought of as 'snapshots' of the database at the given moment they are taken.

- The time to complete the extract process varies on the size of the object, network connection, among other factors.

- Once this extract has completed, it can be published and scheduled to refresh on a recurring basis using Tableau's Data Server (if you have access to Tableau Server or Tableau Online).

- By default, Salesforce extracts are enabled for both incremental and full refreshes, which can be set upon the publishing of a data source.

Once connected to Salesforce data, analysis proceeds in the same visual, drag-and-drop manner to which we are accustomed.

Tableau Salesforce Templates

Need help on where to start visualizing your Salesforce data? Tableau provides Salesforce report templates for new Tableau users to plug in their own Salesforce data for instant visualization. These templates are built off a fabricated Salesforce instance. Just download the report templates from the link below, connect to your own Salesforce data, and choose to Replace Data Source the fabricated data with your own.

Conclusion

Thank you for watching this Salesforce Connector training video. We invite you to continue with the On-Demand Training videos to learn more about using Tableau.