

Dynatrace Account - DQC

Problem

We are encountering issues where:

- A paid Dynatrace Account doesn't have a linked SFDC Account, doesn't have a date for converted_to_paid__c, doesn't have contract start and contract end date.
- An internal Dynatrace Account based on billing_provider_name__c field has is_internal field equal to false.

Analysis

Data

Source: Salesforce data extracted and loaded every 60 minutes by Fivetran in Snowflake BUSSYS PROD

```
1  with acct as (  
2  select  
3      a.id,  
4      a.name,  
5      contract_start_date__c,  
6      contract_end_date__c,  
7      customer_license_type__c,  
8      billing_provider_name__c,  
9      bas_account_uuid__c,  
10     bas_account_status__c,  
11     bas_managed_accountid__c,  
12     bas_accountid__c,  
13     --link_to_bas_account__c,  
14     account__c,  
15     account_type__c,  
16     r.name as record_type_name,  
17     converted_to_paid__c,  
18     internal_account__c,  
19     CASE  
20         WHEN a.internal_account__c THEN 'true'::text  
21         WHEN not a.internal_account__c THEN 'false'::text  
22         ELSE NULL::text  
23     END AS is_internal,  
24     a.createddate,  
25     isdeleted,  
26     a.fivetran_deleted  
27 from PROD_DB.BASE_SALESFORCE.BASE_DYNATRACE_ACCOUNT a  
28 left join PROD_DB.BASE_SALESFORCE.BASE_RECORDTYPE r on a.recordtypeid = r.id)  
29 select  
30     *  
31 from  
32     acct  
33 where  
34     not is_internal and account_type__c in ('Paying Customer')  
35     -- and billing_provider_name__c in ('Azure')  
36     and coalesce(account__c, 'NO ACCOUNT') = 'NO ACCOUNT'  
37 order by  
38     createddate desc;
```

Mapping

2 mapping documents have been shared:

- [Export__Ruxit_CreateAccountMap_2_1698240284536](#)

The below data are received from a JSON file:

Dynatrace_Account__c/Account_Type__c	
Dynatrace_Account__c/Account__c	
Dynatrace_Account__c/BAS_Account_Status__c	
Dynatrace_Account__c/BAS_accountId__c	
Dynatrace_Account__c/BAS_account_Uuid__c	
Dynatrace_Account__c/Billing_Provider_Name__c	
Dynatrace_Account__c/Cancel_Notes__c	
Dynatrace_Account__c/Cancel_Reason__c	
Dynatrace_Account__c/DEM_Overage_Price__c	
Dynatrace_Account__c/DEM_Overage_Quantity__c	
Dynatrace_Account__c/DEM_Units_User__c	
Dynatrace_Account__c/Internal_Account__c	
Dynatrace_Account__c/LeadContactEmailAddr__c	
Dynatrace_Account__c/LeadOrContactId__c	
Dynatrace_Account__c/Monexa_Account_Id__c	
Dynatrace_Account__c/Name	
Dynatrace_Account__c/Number_of_DEM_Units__c	
Dynatrace_Account__c/Partner_Referral_Codes__c	
Dynatrace_Account__c/Premium_Support__c	
Dynatrace_Account__c/Promo_Code__c	
Dynatrace_Account__c/Reactivation_Notes__c	
Dynatrace_Account__c/Referral_Code__c	
Dynatrace_Account__c/Request_Reactivation__c	
Dynatrace_Account__c/Cancel_Request_Date__c	
Dynatrace_Account__c/Customer_License_Type__c	
Dynatrace_Account__c/RecordTypeId	
Dynatrace_Account__c/Bas_Account_Country__c	

- [Export__Ruxit_CreateManagedAccountMap_1698240315720](#)

Dynatrace_Account__c/Account__c	
Dynatrace_Account__c/BAS_Managed_AccountID__c	
Dynatrace_Account__c/BAS_account_Uuid__c	
Dynatrace_Account__c/Internal_Account__c	
Dynatrace_Account__c/Managed_Contact_Email__c	
Dynatrace_Account__c/Name	
Dynatrace_Account__c/RecordTypeId	

 Based on the mapping document it seems that the source is receiving data from Salesforce:

- Root/Object/sfdcToplevelAccountId
- Root/Object/sfdcMasterAccountId__c
- Root/Object/sfdcLeadId

We need to understand how those data are sent to either MC or BAS/LIMA from SFDC.

Contacts

@Amit Jain **(Sr.Integration Architect from Business Systems team - Michigan - USA)** provided the mapping document and specified that the data flow:

Mission Control -> BAS/LIMA -> Salesforce.

@Matt McCarthy **(Salesforce Sr Bus Analyst, Business Systems Massachusetts - USA)** provided the following info:

```

1  7:47 PM
2  shaila.yerrapalli-harinath
3  :zpsp-meeting: Hi Matt,
4  7:47 PM
5  Reaching out for you regarding questions related to Salesforce accounts
6  7:48 PM
7  Why are these 2 Paying Customer Dynatrace accounts#a0Q4u00000TsUs0EAV & a0Q4u00000TsFE1EAN missing account ID?
8  7:49 PM
9  Mccarthy, Matt
10  That's a business question. I would not know why
11  7:55 PM
12  Mccarthy, Matt
13  You might want to to start with the provisioning team, as they are concerned with DT account. Terry Cottrell mi

```

Terry Cottrell (Manager, License Management, Worldwide License - Detroit) provided the following info:

```

1  8:35 PM
2  Krumeich, Thierry
3  Hello Terry -- We are reviewing some Data Quality Check and noticed a few discrepancy with our business rule.
4  For instance we have several Dynatrace Account where the account type is 'Paying Customer' with no Account assoc
5  The last 5 created between 2023-10-11 17:24:06.000 +0000 and 2023-10-25 17:52:13.000 +0000:
6  a0Q4u00000TsVrREAV
7  a0Q4u00000TsUs0EAV
8  a0Q4u00000TsR7NEAV
9  a0Q4u00000TsNMMEA3
10 a0Q4u00000TsNLS EAN
11 We are wondering if those 5 records (there is a total of 350 with the same issue) are ok and we should update ou

```

12 8:45 PM
 13 Cottrell, Terry
 14 Hello
 15 8:47 PM
 16 1st one is marketplace
 17 8:48 PM
 18 same with 2nd one
 19 8:50 PM
 20 those are all marketplace
 21 8:50 PM
 22 i suspect they are pay as you go
 23 8:50 PM
 24 so somewhat outside the SF process
 25 8:51 PM
 26 I would follow up with Mark Eshelby as thats a known issue with no linkage
 27 9:15 PM
 28 Krumeich, Thierry
 29 Is there a way to identify if the DT account is marketplace in SF ?
 30 9:16 PM
 31 or we do have to look into BAS a join the BAS Account UUID ?
 32 9:17 PM
 33 Cottrell, Terry
 34 i would talk to Esh about this
 35 9:18 PM
 36 I think maybe Customer License Type and/or Billing Provider Name could be considered
 37 9:18 PM
 38 (under DT account)
 39 9:19 PM
 40 Krumeich, Thierry
 41 Great! Thanks for your help Terry.

Need to contact **Alex Schults / Cody Potter** to understand Licensing / Provisioning (SY)

1

Nebojsa Simic (Principal Software Engineer, Dev-GRAZ lab, GRAZ-AUT) provided the following information:

1 Marketplace integration goes through BAS
 2 Mktplace -> BAS -> Salesforce
 3 Suggested to contact Alex Schults / Cody Potter
 4
 5 Marketplace
 6 Azure and AWS Consumption - Pay as you go
 7 Azure and AWS Term - Public / Private Offer
 8
 9 <https://aws.amazon.com/marketplace/pp/prodview-zcobx7h2mbtk2>
 10 <https://aws.amazon.com/marketplace/pp/prodview-52i5hmvodlzp>
 11 <https://www.google.com/url?sa=t&rct=j&q=&esrc=s&source=web&cd=&ved=2ahUKewihpobmy5aCAXXUpP0HHX83D2MQFnoECBIQAQ&u>

@Rutvij Sharma (Director, Business Intelligence, Business Systems, Massachusetts - USA) provided the following information:


1 Salesforce and Dynatrace Accounts Data Flow:
 2 When customer approaches for Trial version of Dynatrace product - Lead Dynatrace Accounts (DA) get created.
 3 When customer goes to CPQ and decides to go using Dynatrace product that time once the quote gets approved 2 th
 4 Contracts gets generated - Salesforce account (SA) generated.
 5 Provisioning (aka Auto Prov) takes place in BAS LIMA - SA gets linked to DA.
 6 Possible reasons why account mapping is missing between SA and DA are as follows:
 7 DT products are subscribed from 3rd party tools.
 8 DT products are subscribed by customer using email id which is not available in our systems.

9 SA's are merged based on a single account in that case all other DT accounts will become Orphans and hence loose
10
11 Note: 1 SA → Can have multiple DA's
12 1 DA → Can have multiple BAS A/C's
13 1 BAS A/C → Can have multiple tenants.
14 1 Opportunity → Can have multiple Quotes.
15 1 Quote → Can have one or many DA's.
16 Refer to this report for internal analysis purposes only - dt account id mapping 04_23_21

Cody Potter (Product Architect & Execution Lead, Dev-Detroit Lab, Michigan - USA) provided the following information:

1 11/2/2023:
2 Shaila Yerrapalli Harinath 1:57 PM
3 Hi Cody, Good Afternoon my name is Shaila i am Sr.Quality Analyst from Business Systems team 2:00
4 reaching out for your help to understand the Data mapping and integrations between Market place Dynatrace account
5 a0Q4u00000TsVrREAV
6 a0Q4u00000TsUsOEAV
7 a0Q4u00000TsR7NEAV
8 a0Q4u00000TsNMMEA3
9 a0Q4u00000TsNLS EAN
10 We are wondering if those 5 records (there is a total of 350 with the same issue) are ok and we should update ou
11 Cody Potter 2:30 PM
12 Hi Shaila, this logic is handled with BAS so I need to sync with team. Let me reach out and follow back once I k
13 Shaila Yerrapalli Harinath 2:31 PM
14 Thank you Cody for your response :+1::skin-tone-4:. I will wait until then :smiley:
15 Cody Potter 2:41 PM
16 I synced with @Eshelby, Mark
17 It is known that Marketplace accounts do not provision SFDC top level accounts. There are conversations planned
18 2:42
19 Pretty much this isn't an issue for us for any account that has Partner Code set in SFDC
20 image.png - is as mentioned below this block
21 Shaila Yerrapalli Harinath 2:44 PM
22 oh ok, does that mean this information comes from BAS to SFDC with partner code is it one way data flow ?
23 Cody Potter 2:44 PM
24 I believe it is BAS -> Boomi -> Marketo -> SFDC
25 2:44
26 with partner code either set to AWS or AZURE
27 2:44
28 AZURE wasnt set until recently so there may be some null ones from older accounts
29 Shaila Yerrapalli Harinath 2:45 PM
30 oh ok, got it thank you once again for your input on this. I will document it on our end appreciate your insight
31 New
32 Cody Potter 2:46 PM
33 awesome, sounds good. You're welcome!
34 11/6/2023:
35 Shaila Yerrapalli Harinath 11:24 AM
36 Hi Cody, Good Morning. We do not see consistency with above mentioned behavior of Marketplace DT accounts. We ha
37 Cody Potter 3:07 PM
38 Hi Shaila, DT accounts are only associated with top level accounts in SFDC if someone from Sales ops links them
39 If you are looking to learn more about the billing process
40 @Eshelby, Mark
41 would be a good contact for Marketplace
42 Shaila Yerrapalli Harinath 3:22 PM
43 Thank you Cody for your response, we are currently trying to understand how salesforce account gets mapped to ma
44 3:25 PM
45 By the way what does leandata mean? Can you please provide details on this whenever you get a chance.
46 Cody Potter 3:28 PM
47 so Marketplace doesn't have their own logic or behavior with SFDC mapping. Leandata/account mapping are all conc

48 @Eshelby, Mark
49 who can help walk through that and might have some contacts on Business System side who can help better answer

Account	
Link to Bas Account	Access to bas account
Owner	 #SFDCBoomi
Partner Referral Codes ⓘ	
Partner Code ⓘ	AWS
Promo Code	
Premium Support	<input type="checkbox"/>

Kedar Velankar (Sr. Business Systems Architect, Business Systems Team California-USA) provided below information:

1 Hi Kedar, How are you? 12:29
2 I have a quick question related salesforce 12:30
3 We have some Dynatrace Accounts with out any associated Salesforce accounts linked to it, why is it so? and who n
4 How does the Dynatrace accounts gets linked to salesforce Account? Is it any automatic or manual process? who is
5 Kedar Velankar 12:46 PM
6 Part of it is automated based on lined leads/contacts .. part of it is manual
7 License Mgmt will need to review and associate it with correct account

Markus Opitz (Senior SE & Team captain, Dev-GRAZ Lab, GRAZ-AUT) from MC team provided below information to Alina:

1 From Markus Opitz:
2 "i had a call with terry cottrell from license management and want to share some information with you.
3 first, there is no documented process on how license manager create the accounts, but what happens is:
4 - sales approaches license managers if a new managed account needs to be provisioned
5 - sales gives them the correct salesforce account
6 - license manager copy the id from this account and enter it when creating the managed account in salesforce
7 - sales does not have access to mission control, so license managers need to maintain the salesforce id in missi
8 what i also learned is, that accounts in mission control are not automatically deactivated if they no longer hav
9 next, there is a known issue with offline customers. the status in salesforce never switches from 'Prospect' to
10 another common reason for DQ issues is, that accounts where merged in salesforce, but this change was never refl
11 IMPORTANT: this is all about managed, saas might look completely different
12 [11:08 AM] with that knowledge, most of the DQ issues can be explained:
13 - DQ_ID 138: excluding accounts without license, only about 20 are left. one of them I already analysed with lic
14 - DQ_ID 139: the managed account here has no active license
15 - DQ_ID 160: all of them are either without active license, or offline customers
16 - DQ_ID 167: same as 139, no active license"
17 8:49
18 https://dynatrace.sharepoint.com/:x:/s/AccountExperience/Ee-KDiba-VZFmRx48n04PWMBXfLs8QsbwI-_bs-gwSW_Zw?e=N4FcOT

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