

Salesforce Data Analytics

DSC 202: Data Management for Data Science

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What is Salesforce CRM?



- Salesforce is a Customer Relationship Management (CRM) software and applications focused on sales, customer service, marketing automation, analytics, and application development.
- Customer relationship management (CRM) is a process in which a business or other organization administers its interactions with customers and CRM tool that helps businesses better organize and access customer data.

Use Case

Customer analysis is very important in order to boost the sales/business of any organization.

CRM tools generate a good amount of data which can be used for the analysis of sales/business. It can be helpful for the Sales director/manager to view the data presented in the form of a dashboard so that the director/manager derive insightful information that can help in better decision making and consequently improving sales.

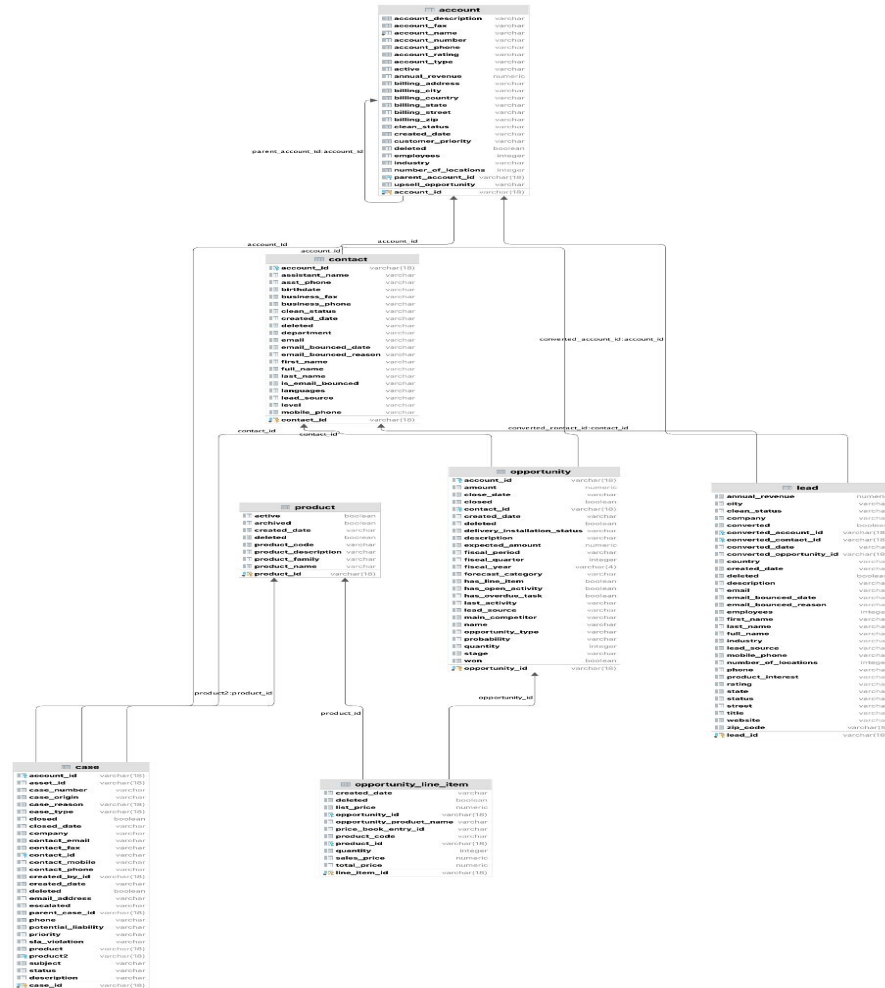
We are a company that sells Electrical/Electronics and Mechanical products including - Electric Motor, Generator, Battery, Gear, etc.

In this project we are analyzing the sales of our products and the issues (case) registered by our customers.

Salesforce Objects

- Account - A customer organization using your product
- Contact - A contact from the customer organization (Account)
- Opportunity - A deal with a customer organization (Account)
- Lead - A potential Customer
- Product - What your company sells
- Opportunity_line_item - A product/service mentioned in a deal (Opportunity)
- Case - A issue/feedback ticket raised by a customer regarding your product

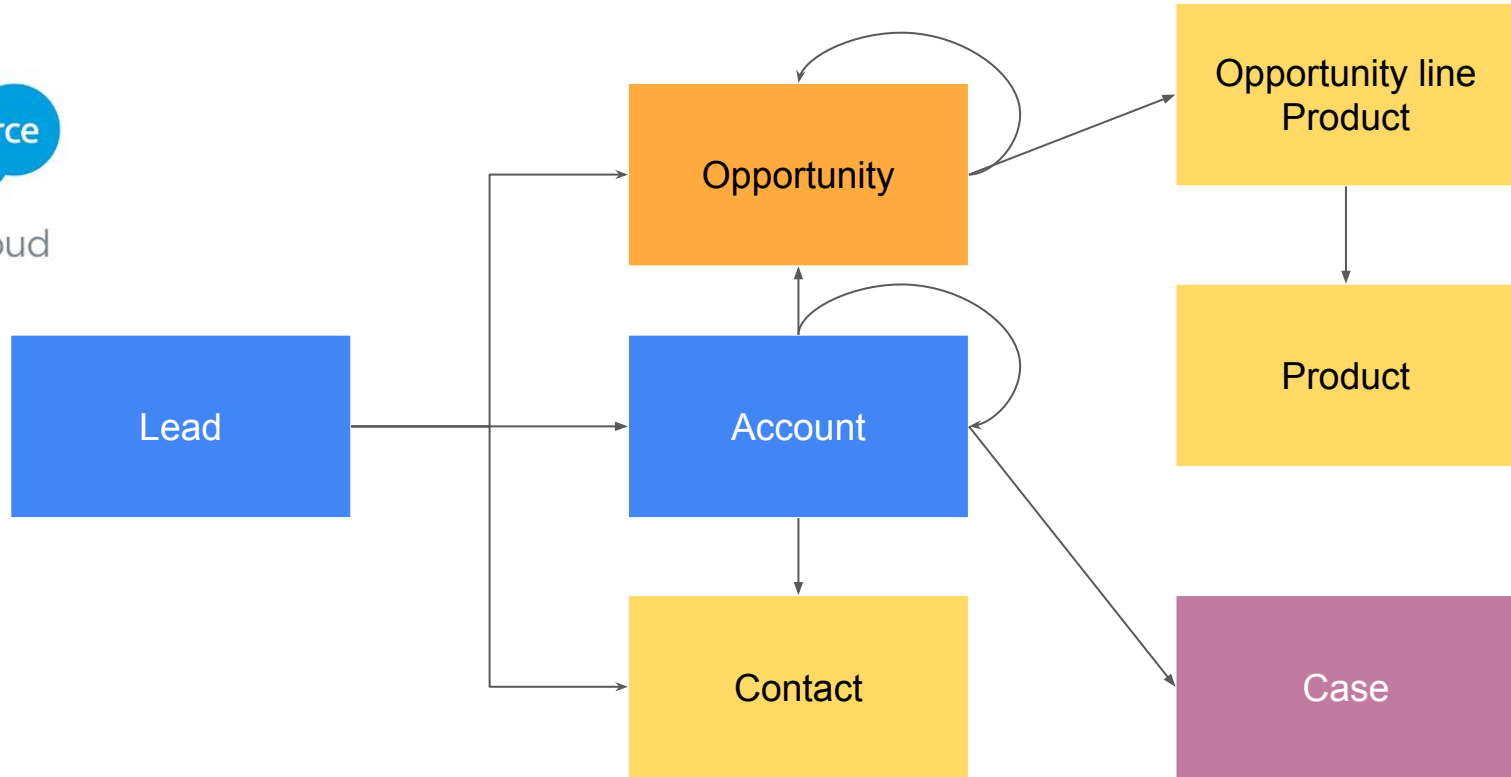
ER Diagram



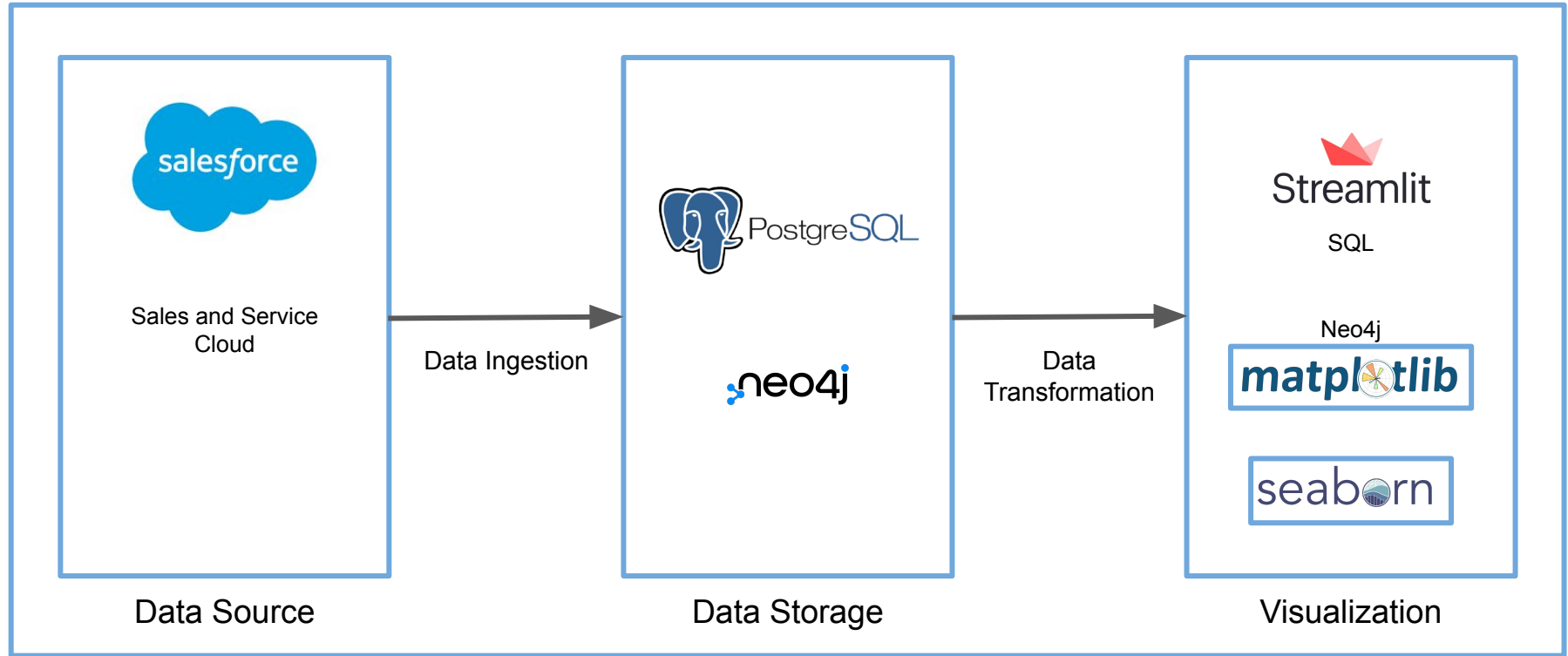
PostgreSQL



sales cloud



Data Pipeline



Data Models in PostgreSQL

account_product_revenue

account_rating_changes

lead_conversion

opportunity_stage_changes

opportunity_stages_monthly

revenue_account_type

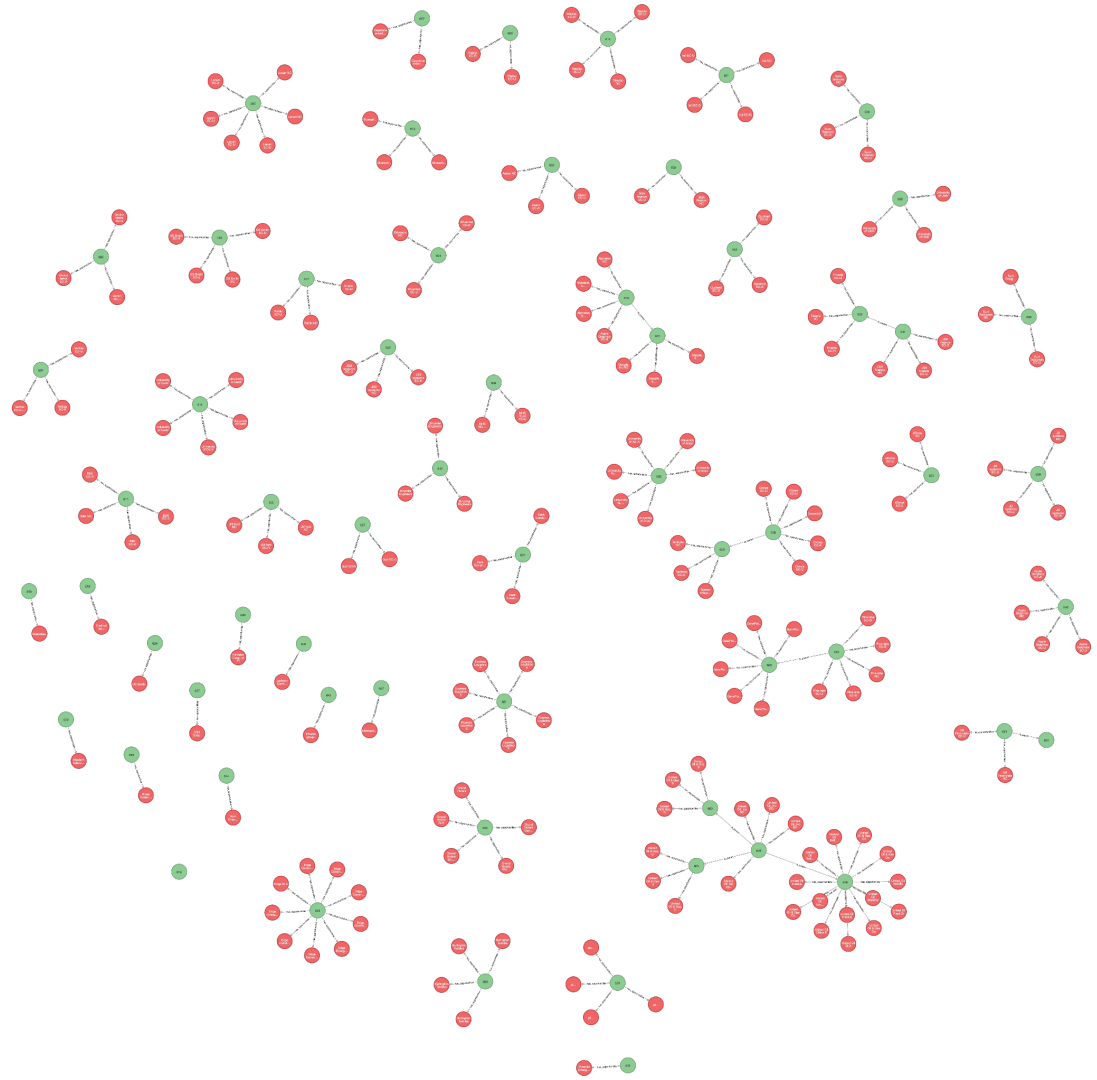
Neo4j Implementation

Relationship between

Account and Opportunity

Account - Green

Opportunity - Red



Neo4j Implementation

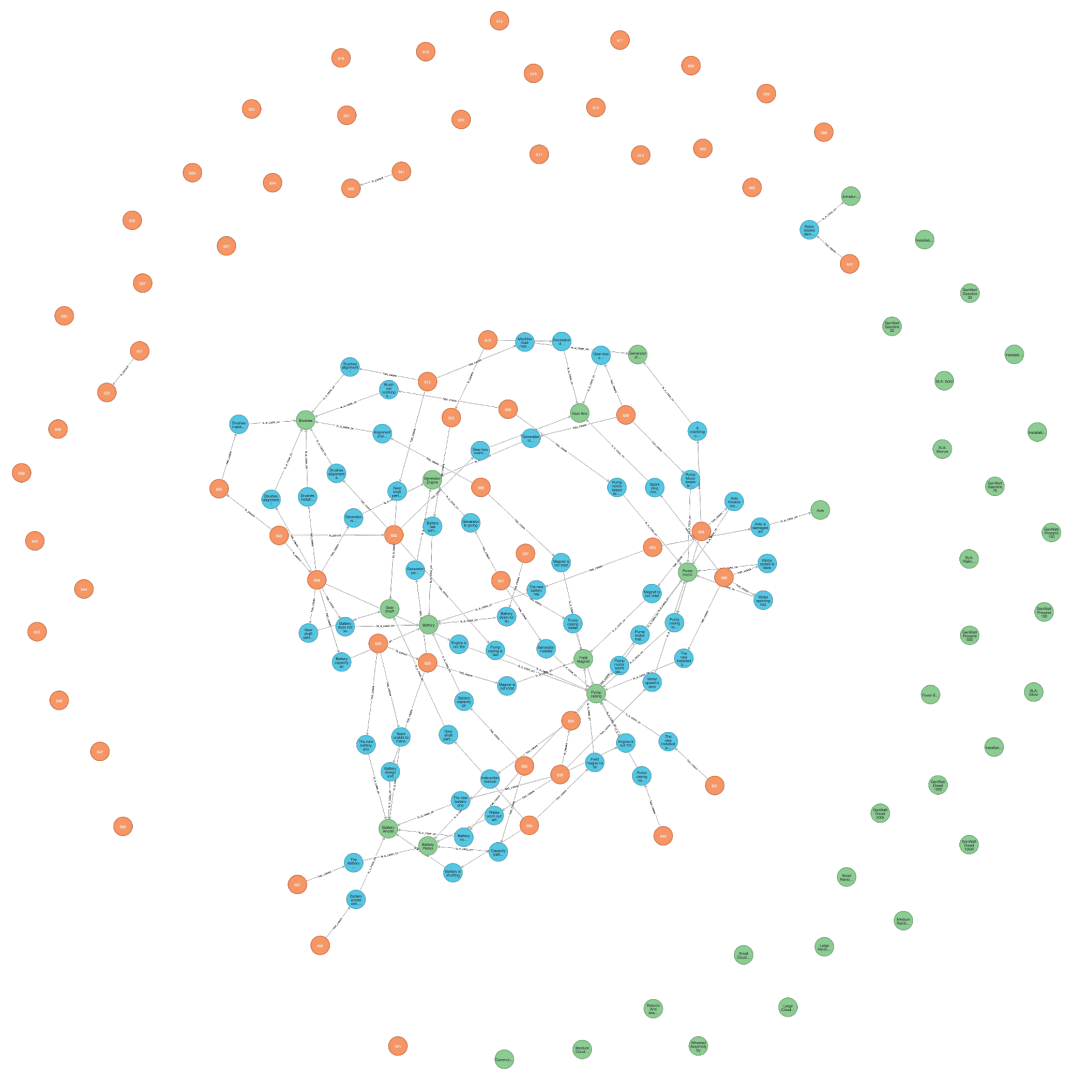
Relationship between

Account, Product and Case

Case - Blue

Account - Orange

Product - Green



Neo4j Implementation

Relationship between

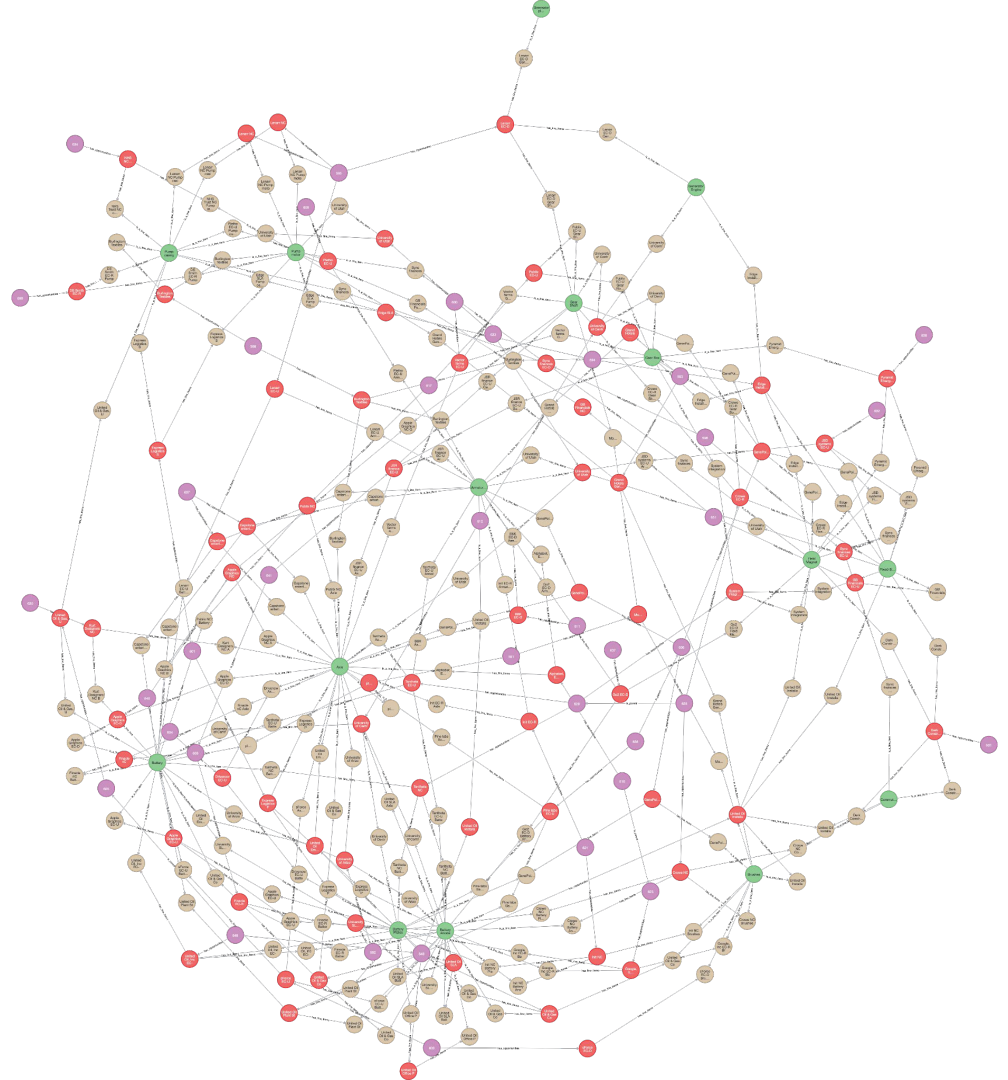
Account, Opportunity, Line Item and Product

Account - Purple

Product - Red

Opportunity - Red

Line item - Brown



DEMO

Thank You!