

Managing change in an agile Salesforce development environment

Using Safyr to enable understanding
and use of Salesforce metadata

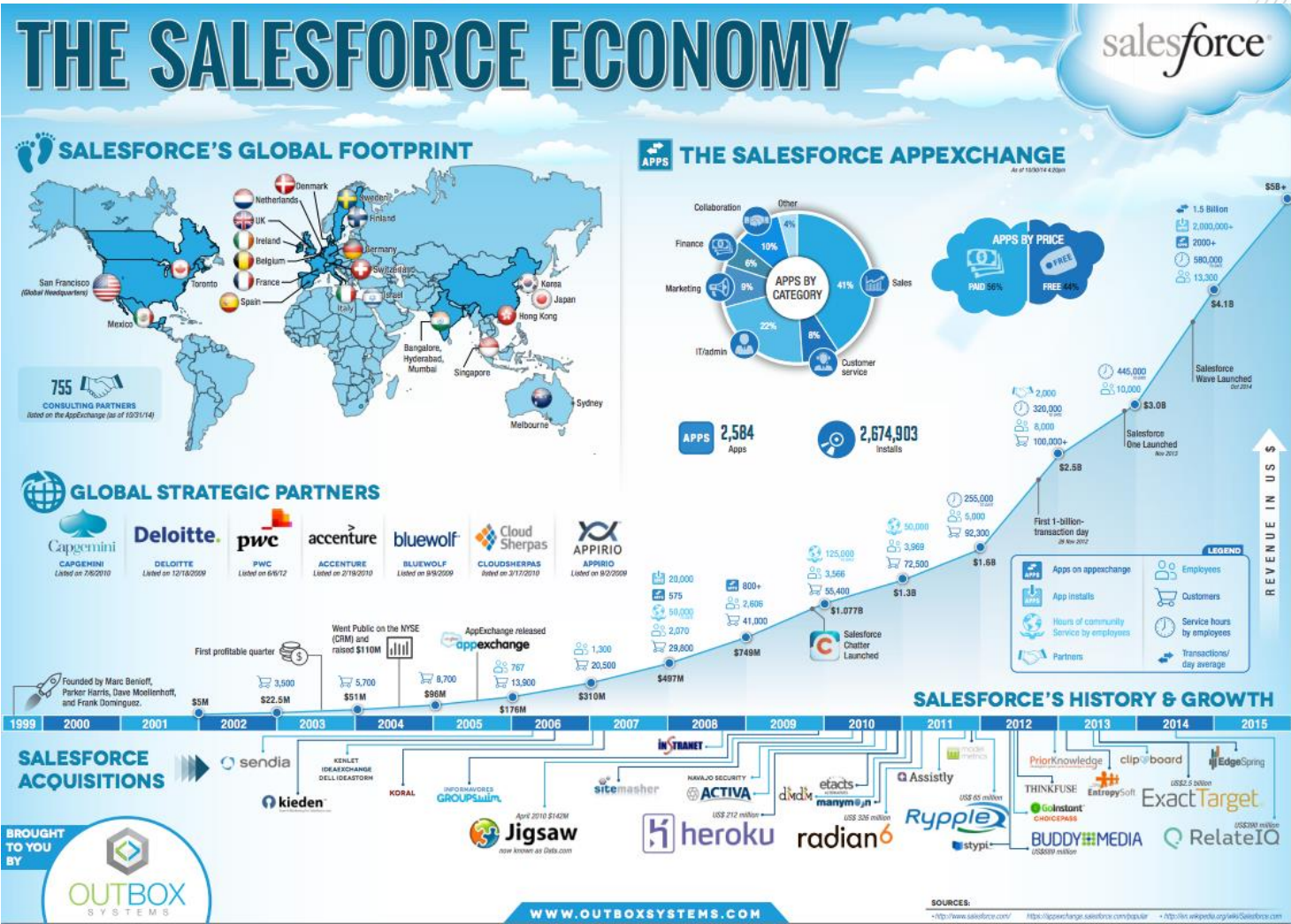
Webinar
23rd March 2016

Agenda

- Introduction
- Why Safyr for Salesforce?
- Safyr
- Demonstration
- Wrap up and close



Why Safyr for Salesforce



Enterprise class application

- Large customers
- Mission critical systems
- Multiple instances
- Heavy customisation
- Ecosystem integration
- Information management headache

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KUONI global travel services



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 **TELSTRA**

SAFYR

Partners and Integrators

- Large practices
- Implement
- Customise
- Support
- Sell own applications



Agile development

- Rapid response
- Scrum
- Sprint sessions
- Less control/standards?
- Data management?



Impact: Finding and using Salesforce metadata becoming a challenge

- Larger data model
- Customisations
- Complex
- Difficult to access
- Compare instances



The headache: Metadata critical for Enterprise Information Management



Enterprise class application.... “Where’s the data?”

“Application and data source integration is the most pressing challenge for users of Salesforce.com”

(Dimensional Research and software company Progress, 2015)

- + BI/Data warehouse
- + Data Governance & Quality
- + Master Data
- + Instance consolidation

Table footprint comparison

SAP (R/3, ECC, BW, CRM, SRM....)	90,000 tables
SAP BW	30,000 tables
Siebel	3,000 tables
PeopleSoft Enterprise	20,000 tables
Oracle E-Business Suite	20,000 tables
JDEdwards One World	3,000 tables
Salesforce	200 tables.... to...?

Salesforce Modelling Features

The screenshot displays the Salesforce Schema Builder interface. On the left, a sidebar lists various objects with checkboxes, including Account, Activity, Asset, Campaign, Campaign Member, Case, Contact, Contract, Event, Idea, Incident, Incident Type, Lead, Opportunity, Opportunity Product, Price Book, Price Book Entry, Product, Solution, Task, and User. The main workspace shows two object panels: 'Account' and 'Event'. The 'Account' panel lists fields such as Account Name, Account Number, Account Owner, Account Site, Account Source, Active, Annual Revenue, Billing Address, Created By, Customer Priority, Data.com Key, Description, Employees, Fax, Industry, Last Modified By, Number of Locations, Ownership, Parent Account, Phone, and Rating. The 'Event' panel lists fields such as All-Day Event, Assigned To, Created By, Date, Description, Duration, Email, End, Last Modified By, Location, Name, Phone, Private, Related To, Show Time As, Start, Subject, Time, and Type. Blue lines connect fields between the two objects, representing relationships. The interface includes a top navigation bar with 'Close', 'Auto-Layout', and 'View Options' buttons, and a search bar for quick finding.

Account Object Fields:

Account Name	Name
Account Number	Text(40)
Account Owner	Lookup(User)
Account Site	Text(80)
Account Source	Picklist
Active	Picklist
Annual Revenue	Currency(18, 0)
Billing Address	Address
Created By	Lookup(User)
Customer Priority	Picklist
Data.com Key	Text(20)
Description	Long Text Area(32000)
Employees	Number(8, 0)
Fax	Fax
Industry	Picklist
Last Modified By	Lookup(User)
Number of Locations	Number(3, 0)
Ownership	Picklist
Parent Account	Hierarchy
Phone	Phone
Rating	Picklist

Event Object Fields:

All-Day Event	Checkbox
Assigned To	Lookup(User+1)
Created By	Lookup(User)
Date	Date/Time
Description	Long Text Area(32000)
Duration	Number(8, 0)
Email	Email
End	Date/Time
Last Modified By	Lookup(User)
Location	Text(255)
Name	Lookup(Contact+1)
Phone	Phone
Private	Checkbox
Related To	Lookup(Contract+9)
Show Time As	Picklist
Start	Date/Time
Subject	Picklist
Time	Date/Time
Type	Picklist

Salesforce Modeling limitations

- Cannot save
- No sharing with other tools
- Difficult to navigate and search as grows and evolves
- No comparison features
- No concept of Subject area
- No row count

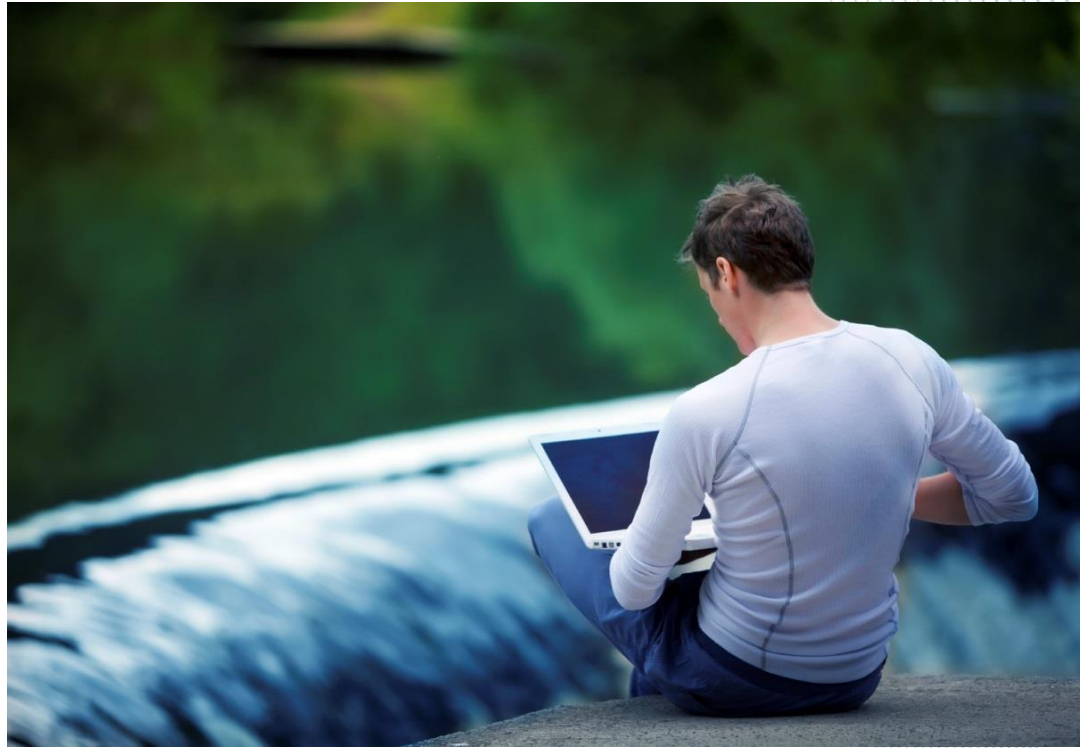
Implication of lack of access & understanding of Salesforce data model

- Late delivery
- Cost overrun
- Low productivity
- Quality issues
- Loss of faith

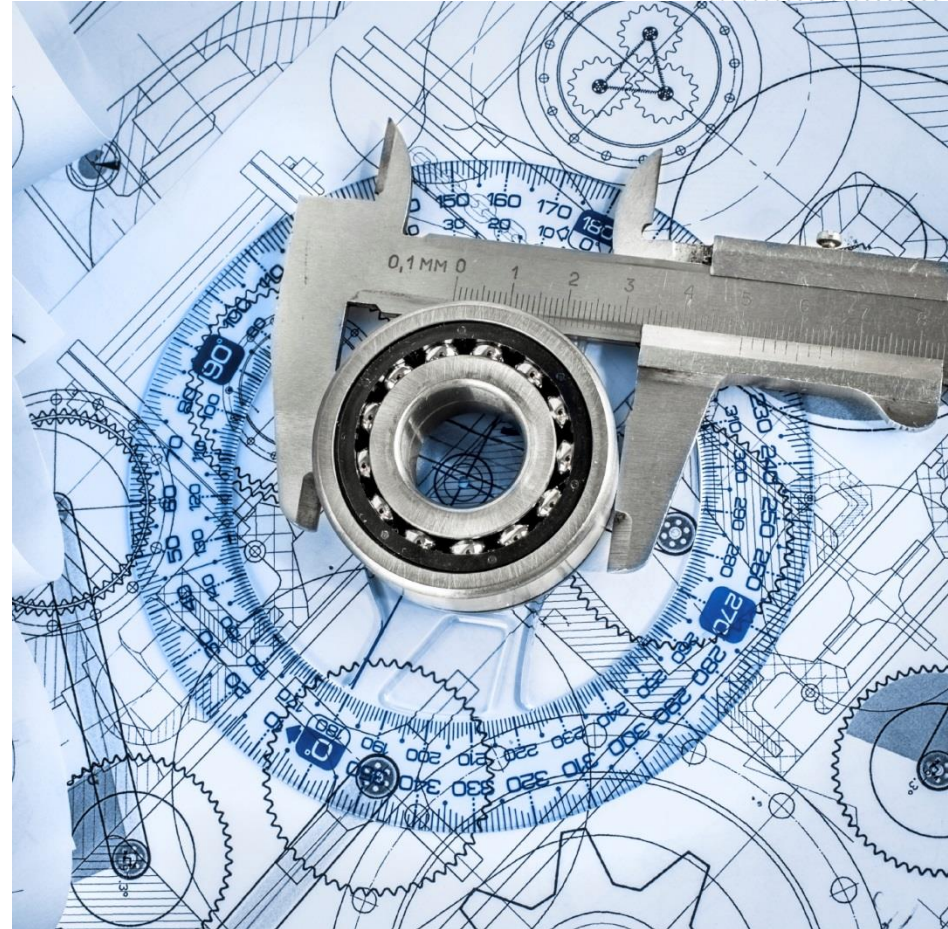


Safyr – the only dedicated solution for metadata discovery

- Shorten time to value
- Reduce cost of data discovery
- Improve accuracy



- Data professionals in control
- Find what you need
- When you need it
- In context



DISCOVER, SCOPE AND DELIVER WITH SAFYR®

DISCOVER

- SAP Business Suite
SAP BW
SAP Business Suite on HANA
- Oracle E-Business Suite
PeopleSoft
Siebel
JD Edwards EnterpriseOne
- Salesforce (and Force)
- Other Packaged Applications

METADATA DISCOVERY

SCOPE

Safyr®

- Navigation
- Analysis
- Visualisation
- Comparison

DELIVER

DELIVER

- COST, TIME SAVING & EXTRA PRODUCTIVITY**
- Big Data
 - Analytics & BI
 - Data Integration
 - Data Migration
 - Data Governance
 - Enterprise Architecture
 - Application Consolidation
 - Master Data
 - Metadata Management
 - Data Modelling

Safyr . . . single source of trusted application metadata

SAP® Certified
Powered by SAP NetWeaver®

SAP® Certified
Integration with Applications on SAP HANA®

How does Safyr work with Salesforce?

- Uses Force WSDL API to connect and extract metadata from a Salesforce system
- ‘reverse engineers’ all standard and custom tables, columns, relationships, descriptions ..in minutes
- Safyr features for searching, navigating, sub setting and then exporting to a range of other ‘metadata’ tools
- Multiple Salesforce instances can be compared using the Safyr ‘Subject Area Compare’ feature ..in minutes

Demonstration

Sample customers



Benefits to Salesforce, customers and partners

- Faster, more cost effective implementation of complex projects
- Fulfils role as part of Enterprise Information Management ecosystem
- Broader Safyr metadata capabilities accelerates integration with legacy packages

Next action



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“The importance of understanding Salesforce data models”

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