#iSolveditwithDomo
Linking to Salesforce in Domo

Problem
Manager doesn't have visibility into employee communication sent to customers. They use Salesforce and want to know what is going out to customers from employees.

Solution
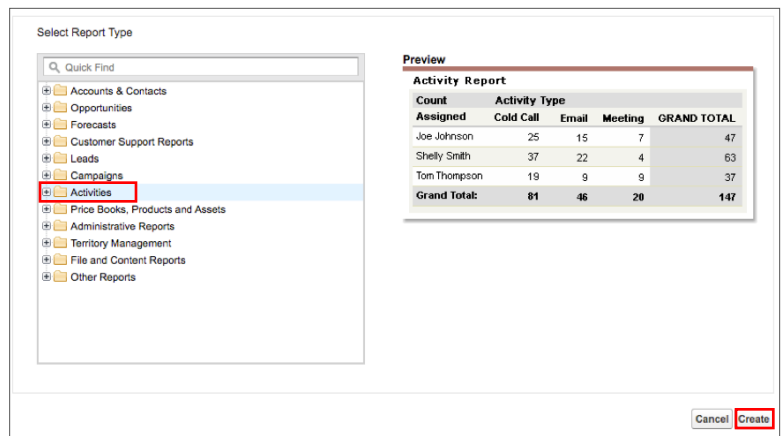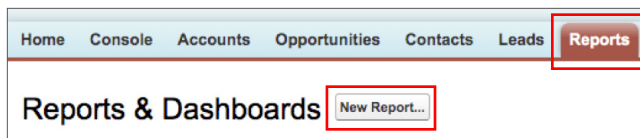Create a card that shows employee activity with a link to Salesforce using Beast Mode.

Things you will need

- Access to Salesforce with credentials
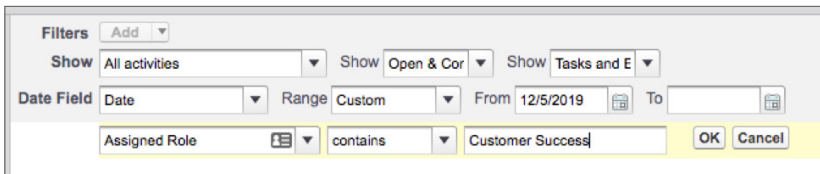- Ability to create a dataset using the Salesforce Connector

How to guide

Step 1: Create a report in Salesforce
In Salesforce, click on the "Reports" tab. Select "New Report," and choose "Activities" type and click "Create."
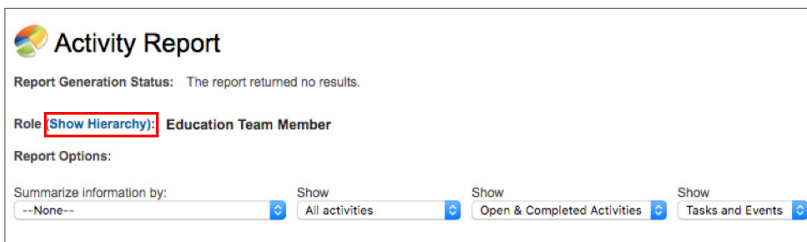
Then customize as follows:
- Show: All Activities
- Show: Open and Complete Activities
- Date Range–Custom from desired start date. Leave the "To" date blank so it is always pulling to current and future.
- Drag in "Assigned Role" to the filters section to define which users you want to include.

Make sure you have the columns: Company/Account Name, Activity ID, Activity Type, Assigned, Contact, Date, Status, Subject.

Run your report to make sure it is pulling the correct data. I had issues with not getting everyone on the team at first. I noticed under Role it had a link for "Show Hierarchy" which I clicked and moved up the chain a bit until everyone I needed was included.
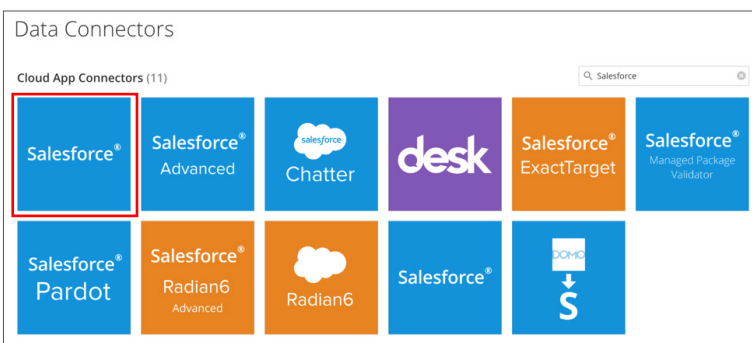

Lastly, save your Report.

Step 2: Use the Salesforce Connector to bring the data into Domo
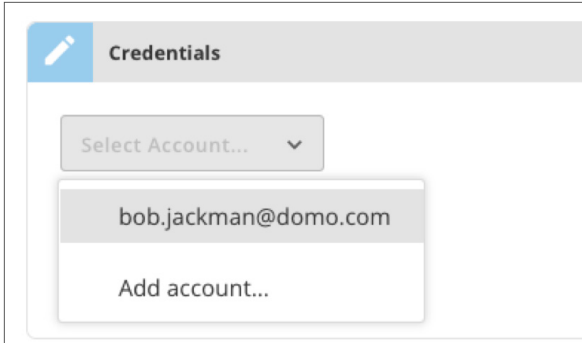
Open the Salesforce Connector
- In Domo, click the "+" on the top right of Domo, and select Data and Cloud App. Or in the Data Tab, click Cloud App.
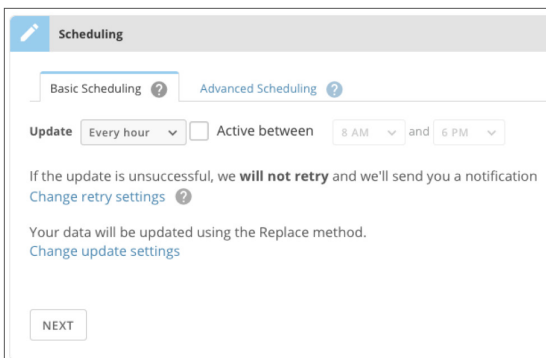- Search for Salesforce in Data Connectors and choose "Salesforce."

Hover over it and click "Connect." Then click "Get the Data."
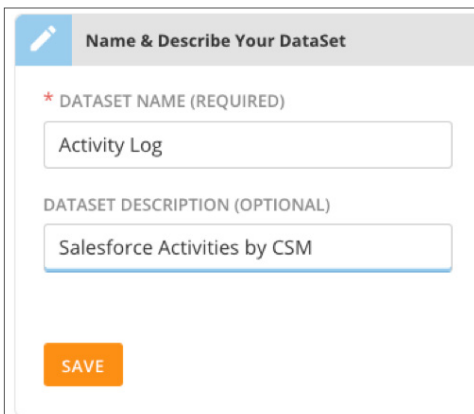
Connect your data with the Connector

- Credentials
    - Select your account or add a new account. Then click Next.

- Data Selection
    - Under "How do you want to select your Salesforce Data?" select "Reports."
    - Under "Salesforce Reports" select <Name of your report> (It may take some time to load the list depending on the number of reports available).
    - Under "Unique Field to Retrieve More Than 2000 Rows" select "Activity ID."
    - Under "Date Format" select "Month/Day/Year."
- Scheduling
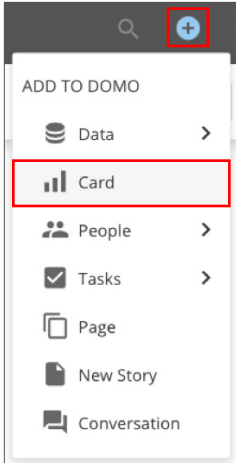   - Choose your desired refresh rate.

- Name and Describe your DataSet. Be descriptive so you can find it again later.
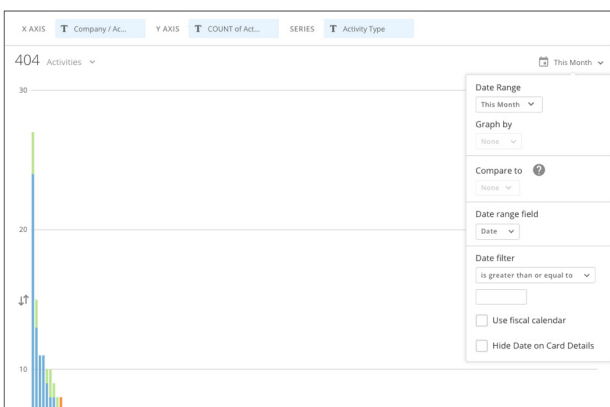
Step 3: Create a Card

- Click the "+" at the top right of Domo and choose "Card."

- Choose "Existing Data" in the data source list.
- Search for your new DataSet in the list and click "DataSet."
- Drag the following to populate the card
  - X Axis – Company / Account
  - Y Axis – Activity ID (Count)
  - Series – Activity Type
- Set the Date Range to "This Month"
- Sort as desired (Most or Alphabetical)
- Set the Summary Number as "Count of Activity ID" and change the text to "Activities"
- Save and close the card

Create the Drill Path
- With the newly created card, click on the Wrench icon and choose "Edit Drill Path."
- Click "Add a view."

- Choose a Table Card

Create a Beast Mode for the link to Salesforce

- Click "Add Calculated Field"
- Name it "Link"
- Formula: CONCAT('', 'Salesforce Link', '')
- Validate and Save & Close

Add the following columns:

- Assigned, Company / Account, Activity Type, =Link, Subject

Choose "No Summary Number" and Save & Close

Some Things to Think About

Access

You can PDP the Dataset to allow managers to see their team, individual contributors to see just their accounts, and directors the ability to see the whole team.

Strategic Use of Time

Join in your account value to see if your time is being spent wisely. If you have a large amount of activity on lower valued accounts, it may be good to re-think your strategy.

Tendency of Micromanage

It can be easy with this type of data access for Managers to micromanage or even for contributors to feel micromanaged. This is designed to give some visibility for managers, but managers should be strategic in how they approach coaching employees.