



## CenterView™ Enhances Salesforce.com and Provides Data Visualization for the Whole Organization

Because of its many advanced features and hosted model, Salesforce.com has become the leader in software-as-a-service (SaaS) customer-relationship-management (CRM) software, and has been adopted by many organizations as their de facto solution for storing CRM data, tracking sales activities, and creating forecasts. Corda® CenterView™ can retrieve data from Salesforce.com and display it in a CenterView performance dashboard. CenterView provides organizations that use Salesforce.com with additional value on their Salesforce.com investment, including these benefits:

- Viewing data from multiple sources on one performance dashboard
- Accessing performance dashboards through CenterView or Salesforce.com
- Querying Salesforce.com data with the query wizard
- Simplifying Salesforce.com reporting
- Improving time to access Salesforce.com data
- Customizing the appearance of information
- Communicating securely between CenterView and Salesforce.com

### Viewing Data from Multiple Sources on One Performance Dashboard

Companies that use Salesforce.com find it invaluable for storing their CRM data, and while Salesforce.com allows you to store other types of data in its database, many companies use methods outside of Salesforce.com to store data that is not CRM related. For example, accounting data might be stored in a Microsoft® Excel® spreadsheet. By using CenterView in conjunction with Salesforce.com, you can pull data from diverse sources and view it in one performance dashboard. This functionality makes it easy to view data stored in Salesforce.com, such as sales projections, alongside financial data like accounts receivable. CenterView can pull data from virtually any source to let you compare metrics side-by-side and ensure that you can access the information you need to make key decisions, and that you can access it when you need it.



Figure 1. With a CenterView performance dashboard you can view CRM data stored at Salesforce.com alongside other valuable company data



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## Accessing Dashboards Through CenterView or Salesforce.com

In addition to being able to view data from multiple sources in a CenterView performance dashboard, you can choose which interface you want to use. For example, you can open the CenterView dashboard directly and view the CenterView interface; you can set up a tab to view the CenterView dashboard within Salesforce.com; and you can even use Salesforce.com controls to set up objects that render individual CenterView charts or graphs right on the Salesforce.com page.

With this flexibility, the departments in your organization that access Salesforce.com frequently can view charts through the interface they use most often, including data that is stored in other repositories. Conversely, the departments that don't use Salesforce.com can view the same data through CenterView.

## Querying Salesforce.com Data with the Query Wizard

Typically, to export data from Salesforce.com, you must know how to query their web services using SOQL, which is Salesforce.com's customized version of structured query language (SQL). While SOQL is a simplified version of SQL, it still requires fairly advanced knowledge to write a query. But with CenterView's query wizard, you can use a drag-and-drop interface to easily create queries that will pull Salesforce.com data into a CenterView performance dashboard.

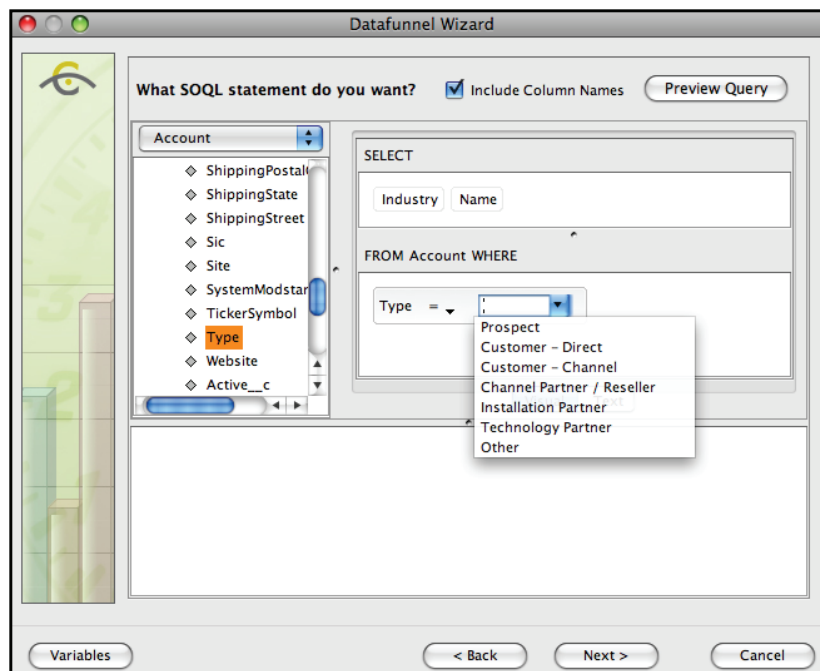


Figure 2. With the query wizard you can create SOQL queries through a drag-and-drop interface.



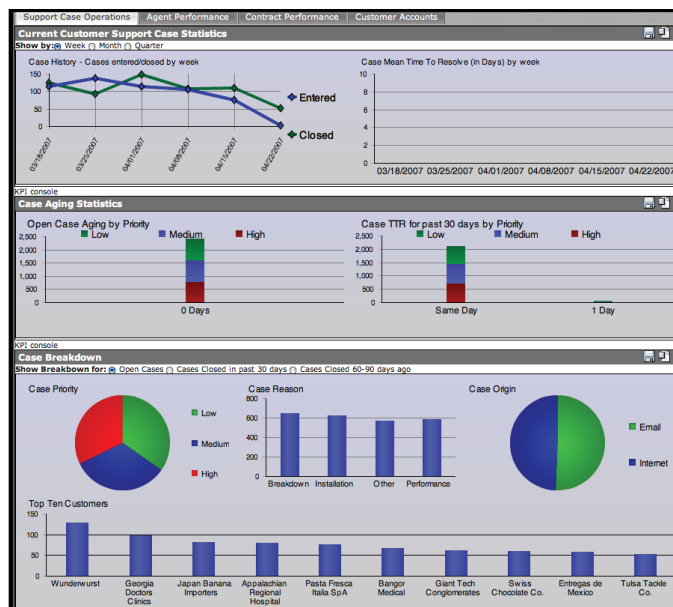
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When you launch the query wizard, it discovers the objects and properties you've defined in Salesforce.com and displays them in the left pane. You can then drag them into the center pane to create a query that returns results using those objects. In addition, the SOQL commands are displayed in the right pane as you create the query and you can edit the SOQL directly if you choose. If you type directly into the command-line SOQL pane, the wizard prompts you with tips. For example, if you type a command like SELECT, the wizard prompts you with the correct parameters.

## Simplifying Salesforce.com Reporting

Using CenterView performance dashboards to query data in Salesforce.com simplifies the process of getting similar data with slightly different parameters. Salesforce.com includes powerful reporting options and allows you to create dashboards from data, but it doesn't allow you to easily change parameters for similar reports. For example, you can't simply change a date range on the same report; you must clone the report for every new date range. With a CenterView performance dashboard, it is not necessary to clone the dashboard to get similar information. You can design a CenterView performance dashboard to have variable input options and all you have to do to get new data according to the parameters is choose the option from a drop-down menu.



## Improving Time to Access Salesforce.com Data

Although CenterView doesn't increase the query performance of Salesforce.com, it can run queries at regular intervals and then cache the information so that the process of data retrieval runs in the background and is invisible to the user. Even simple queries executed directly in Salesforce.com can take 10 to 15 seconds and more complex queries can take 10 minutes or more. CenterView eliminates this wait time.



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You can set up schedules for two different types of caching in CenterView: a “data snapshot” and a scheduled query:

- **Data Snapshot.** With this type of caching, the results from a Salesforce.com query are copied into a locally hosted database for very fast access; however, taking a data snapshot can be time-consuming and bandwidth intensive, so it is best to run it once per day during off hours. For data that is still useful when it is as much as a day old, a data snapshot is all you need.
- **Scheduled Query.** Use this caching option for more vital data that you need refreshed more frequently. You can set scheduled queries to run as often as is needed, allowing you to view the information you need immediately, ensuring that the data is as fresh as you need it to be.

CenterView provides easy-to-use tools to help you choose which queries you want to schedule more frequently and which you want to schedule less frequently or allow to be accessed through a data snapshot.

### Customizing the Appearance of Information

CenterView is optimized to make your data look visually stunning. It includes advanced tools and templates to help you display your information any way you choose, including the ability to display your logo or colors in accordance with corporate style guidelines. The global color palettes make it easy to change the colors in all your graphs, charts, or maps at once. Because of this advanced functionality, whenever you need to make presentations with your Salesforce.com data, you can pull it into a CenterView performance dashboard and ensure that your presentation will fit your corporate culture.

### Communicating Securely Between CenterView and Salesforce.com

When querying Salesforce.com, CenterView authenticates itself using the secure authentication protocols native to Salesforce.com. Access to data can be secured down to the individual user based on their roles and privileges in Salesforce.com, which allows you to grant users access to only the data they should see. If you have users in your organization who need to log in to both the CenterView and Salesforce.com interfaces, you can use a single sign-on plug-in tool. Corda Technologies can help you implement this tool so that users can log in to both interfaces simultaneously.

### Conclusion

Salesforce.com is powerful CRM software. By using CenterView in conjunction with Salesforce.com, you can view your CRM data alongside other data in your organization to better track key performance indicators (KPIs). In addition, CenterView enhances or simplifies some of the functions of Salesforce.com, enabling you to easily maximize your investment in Salesforce.com.

