

Model Customer Data with an Industry Focus

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Agenda

01 Intro to Salesforce Industries

03 Sales and Service Cloud Customer Data Model

05 Map to an Example Customer Structure

02 Service Centric Industries - Communications, Media, Energy & Utilities

04 Communications, Media, Energy & Utilities Cloud Customer Data Model

06 Key Takeaways

Vlocity to Salesforce Industry Clouds



Powered by Revenue Cloud

 = Powered by Revenue Cloud



Salesforce Industries



Communications



Media



Energy & Utilities



Financial Services



Healthcare &
Life Sciences



Public Sector



Retail



Manufacturing



Consumer Goods



Insurance



Transportation and
Hospitality



Automotive



Education



Non-Profit

Service-Centric Industries



Communications



Mobile Service
Internet Service
TV Service

Media



Streaming Service
Advertising Service
Gaming Service

Energy & Utilities

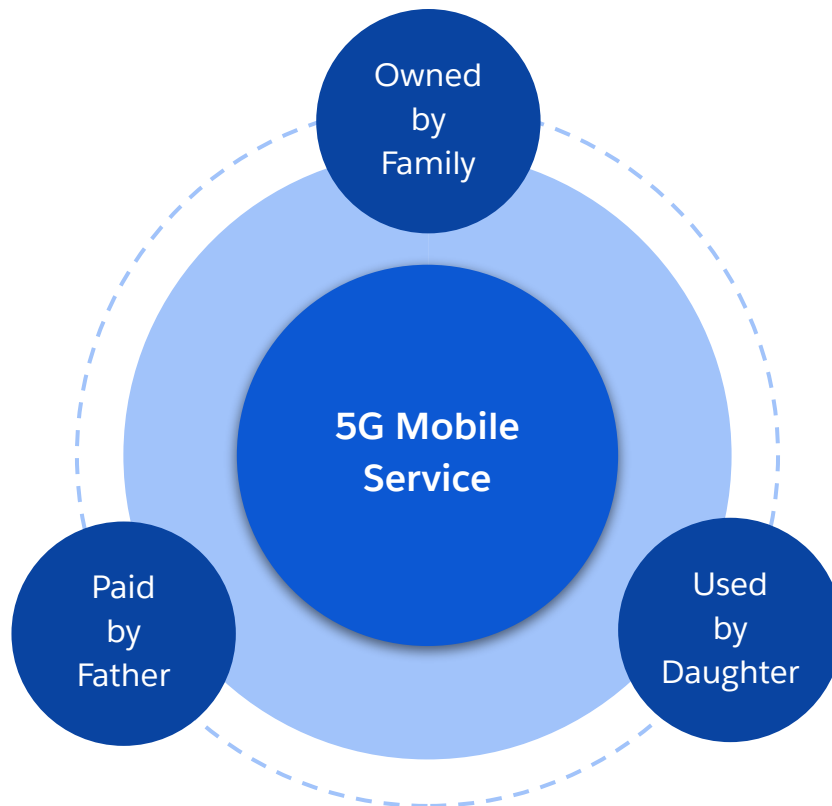


Electricity Service
Heating Service
Gas Service

Common Thread: Intangible Services or Subscriptions

Customers and Their Services

Key Business Entities

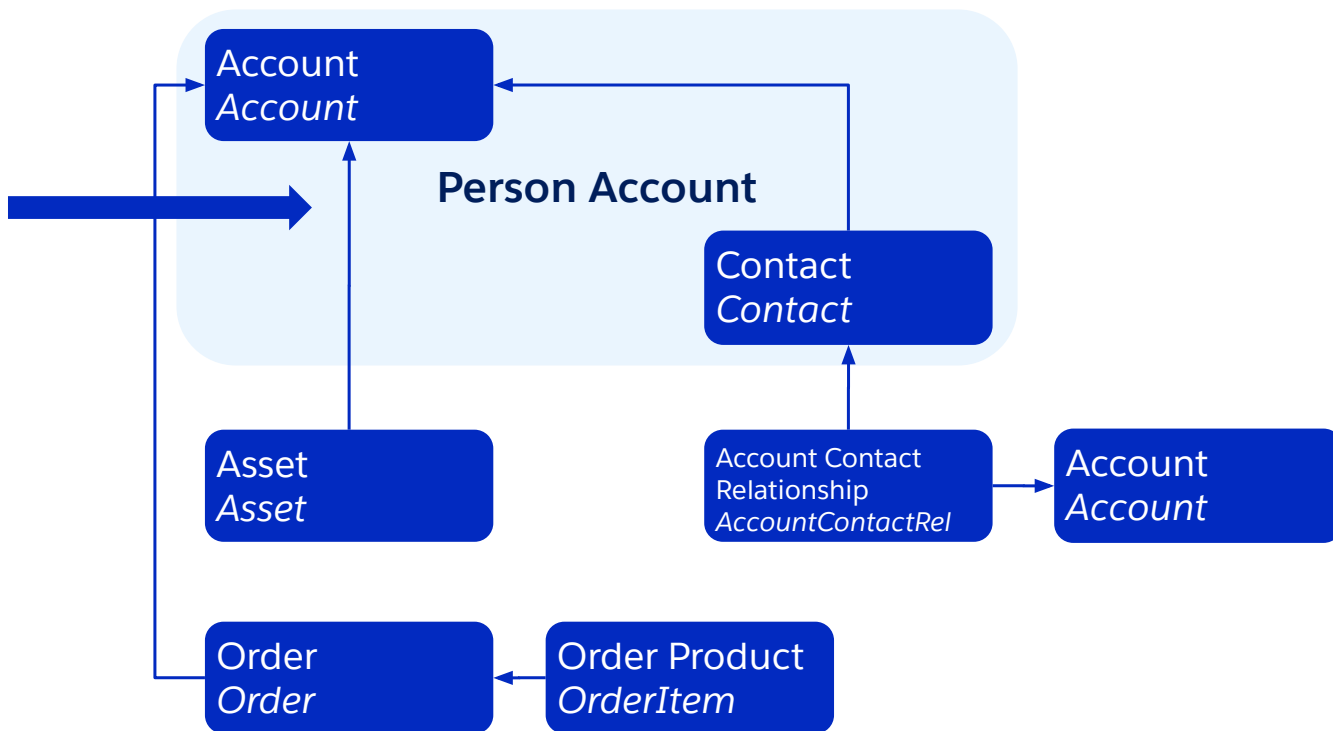


Sales & Service Cloud

Customer Model



What if the goods or services have a different owner, payer, and user?



Legend

Entity
API Name

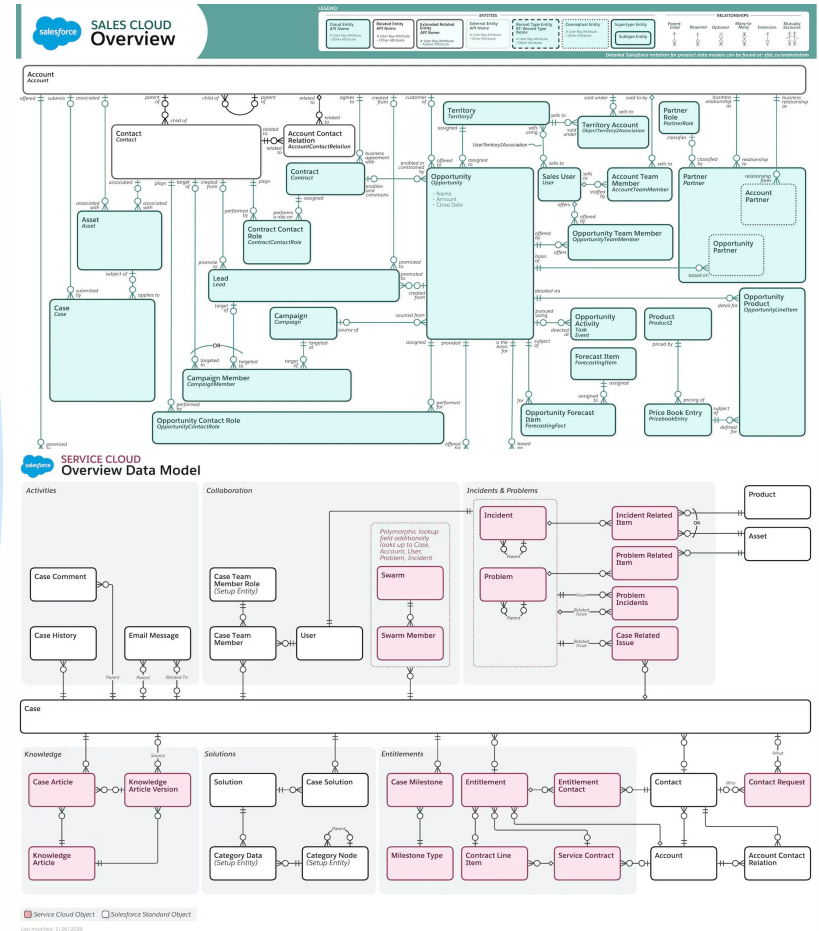
Sales & Service Cloud

That's not all!

Check out Salesforce Architects Site for Data Models

Full Data Models

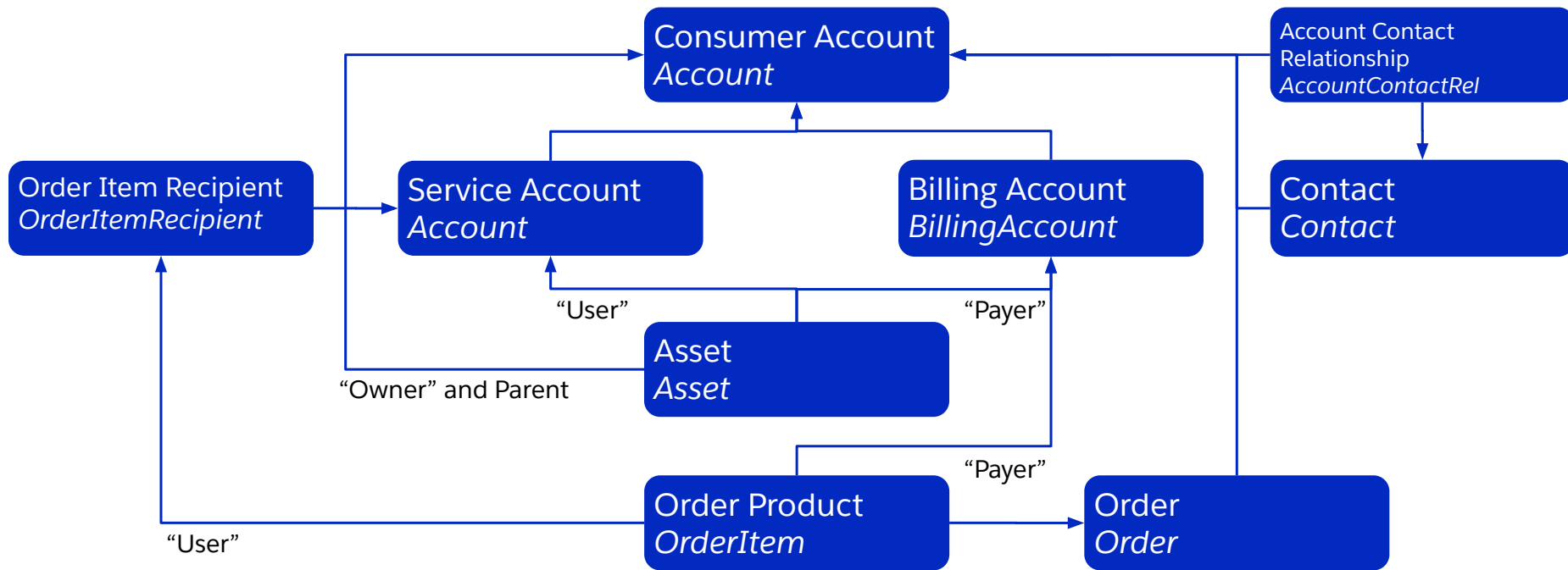
- Sales Cloud¹
- Service Cloud²
- Product & Price Book³



Communications, Media, Energy Cloud



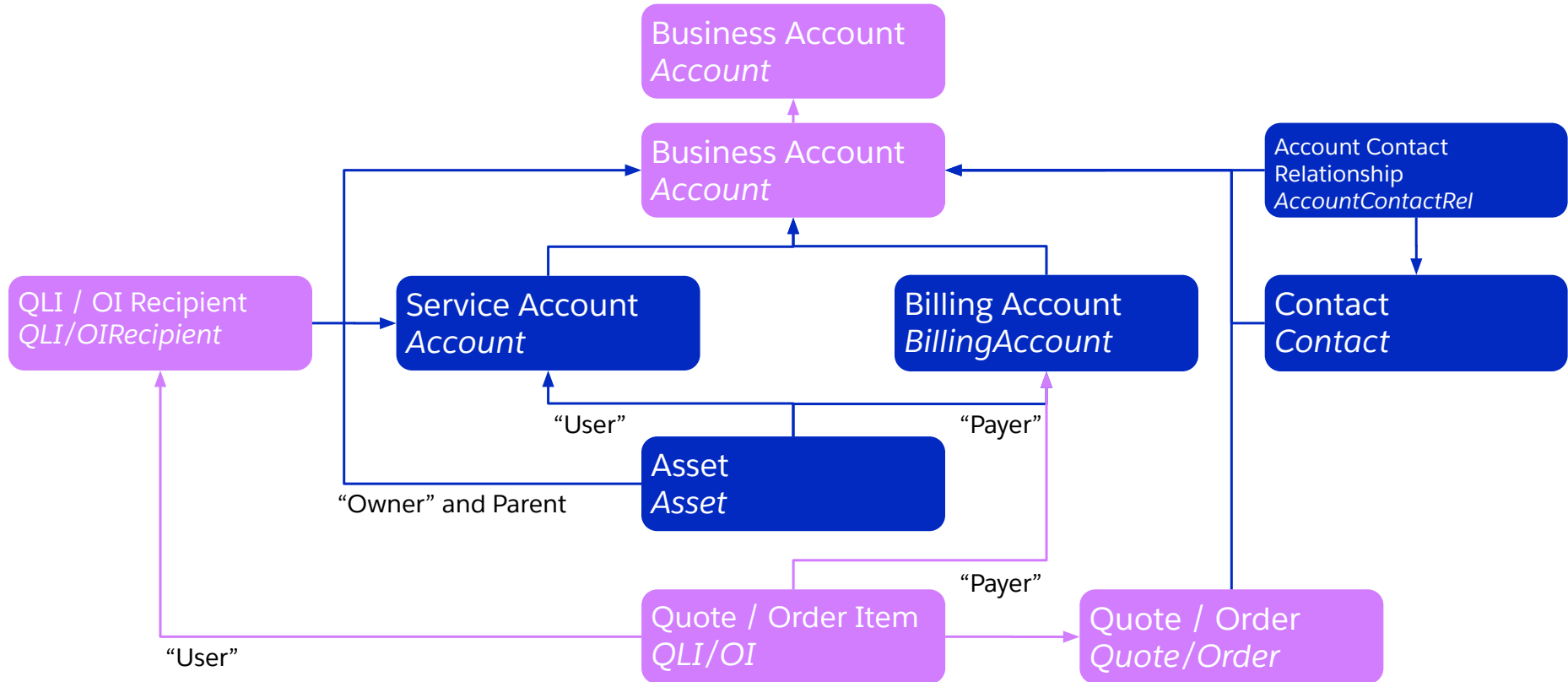
Revenue Cloud B2C Customer Model



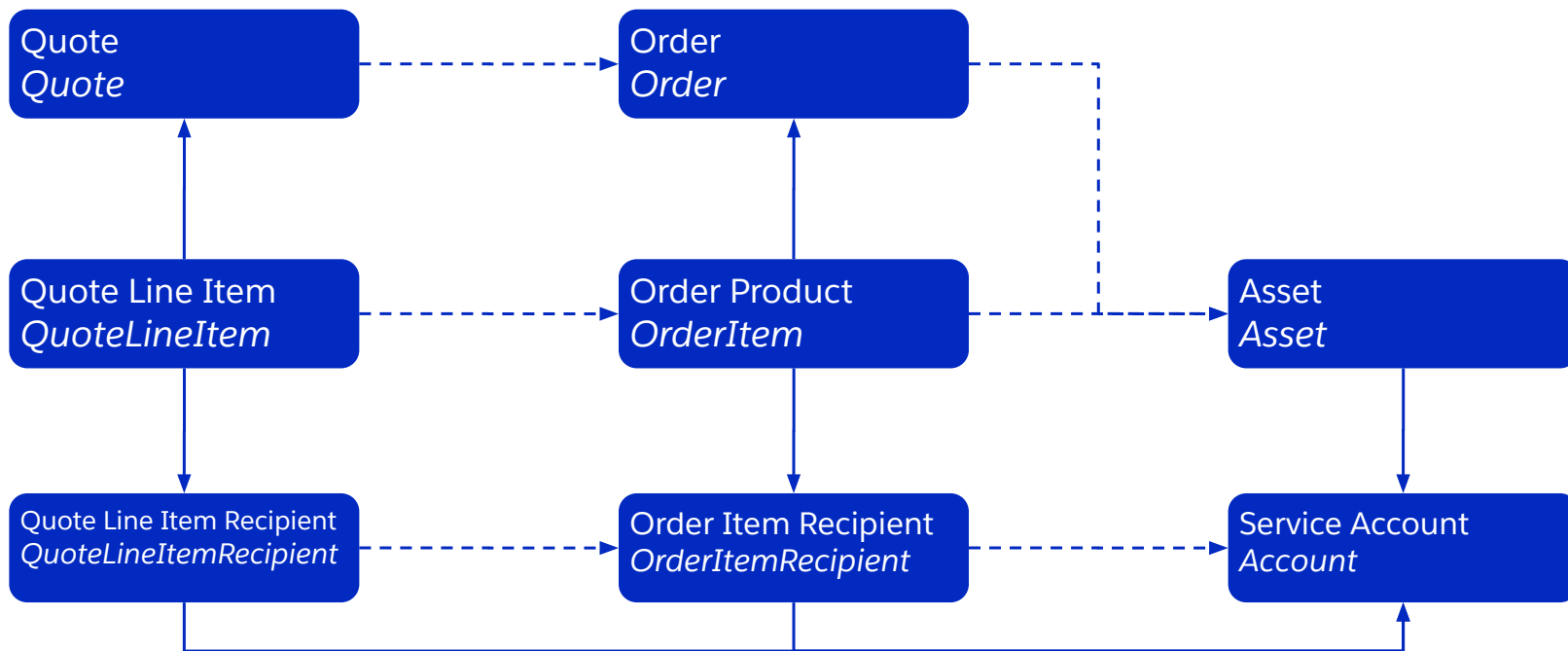
Communications, Media, Energy Cloud



Revenue Cloud B2B Customer Model



Communications, Media, Energy Cloud



Key Additions to Sales & Service Cloud



Building on the Core Foundation

Service Account: A variant of standard Accounts for representing a location. You create a Record Type on Account and define it as a Service Account in Setup.

Billing Account: Similar to the standard Account, but a new standard object originally introduced in Salesforce Billing, soon in broader Revenue Cloud / Industry Cloud.

Quote Line Item, Order Item, Asset Lookups: Quote Line Items / Order Items / Assets have lookups to Service Accounts and Billing Accounts to identify the user and payer.

Recipients: Staging locations before they become Services Accounts once the order is fulfilled.

Person Accounts?

Did we forget something?



No Person Accounts!

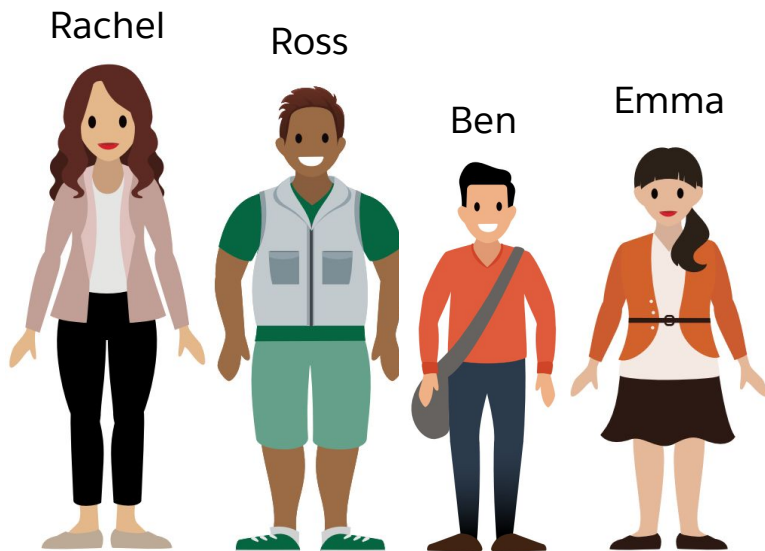
They cannot participate in account hierarchies - they cannot be a parent of another account or be parented to another account.

This breaks the out of box Recipient to Service Account conversion

Example Customer Structure



Let's map this to a real use case

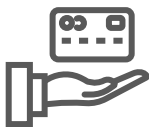
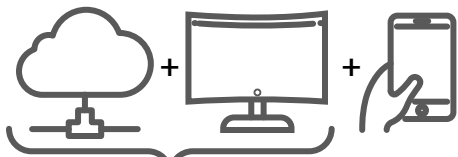


Example Customer Structure

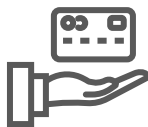
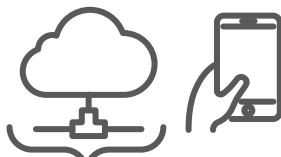


Let's map this to a real use case

Rachel



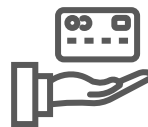
Ross



Ben

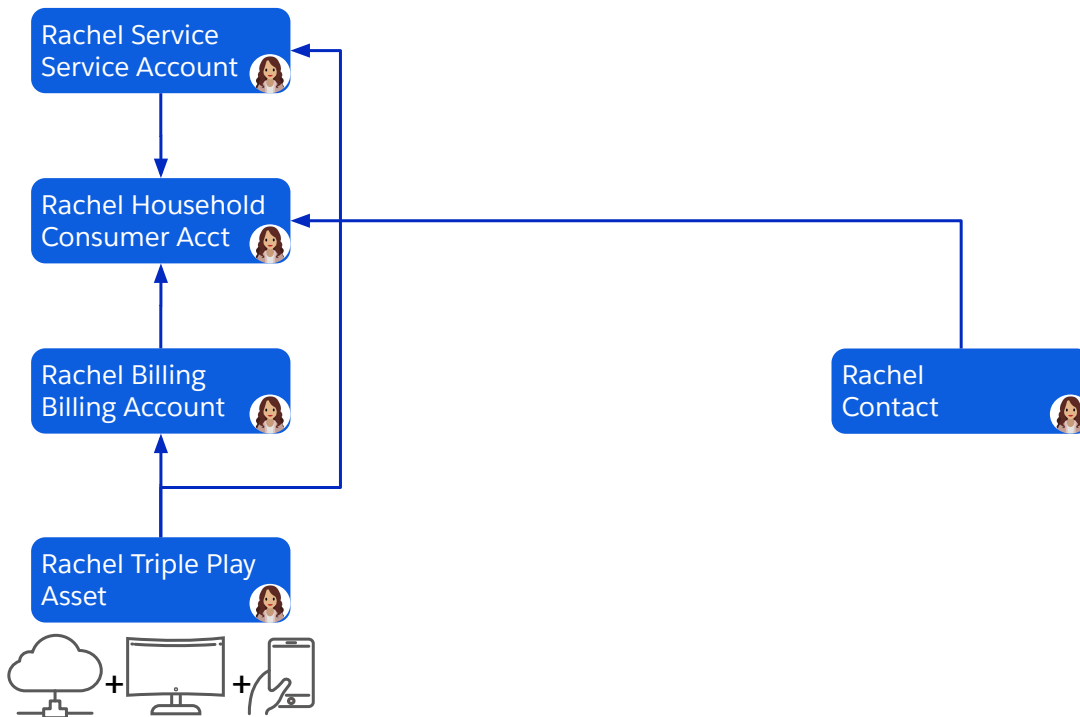


Emma



Example Customer Structure

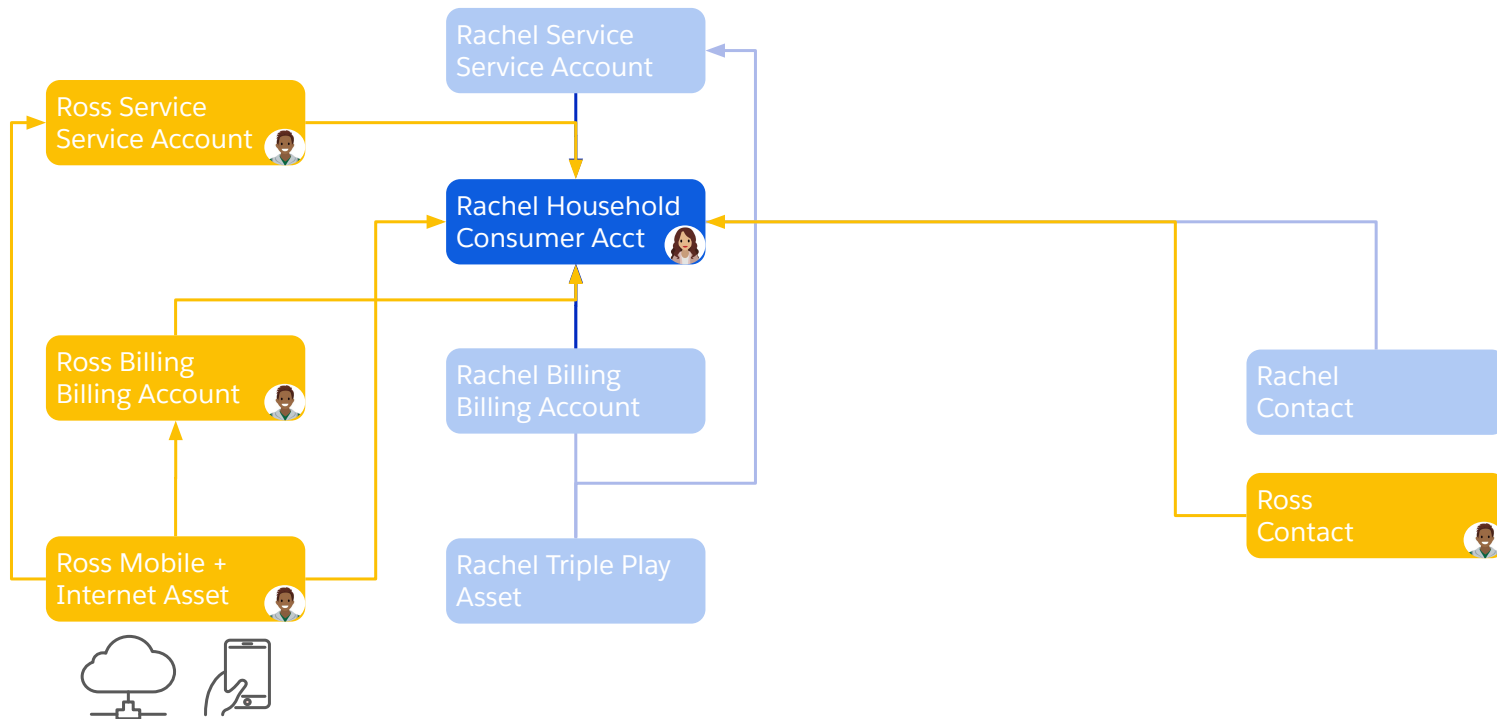
Let's map this to a real use case



Example Customer Structure



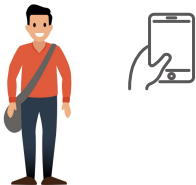
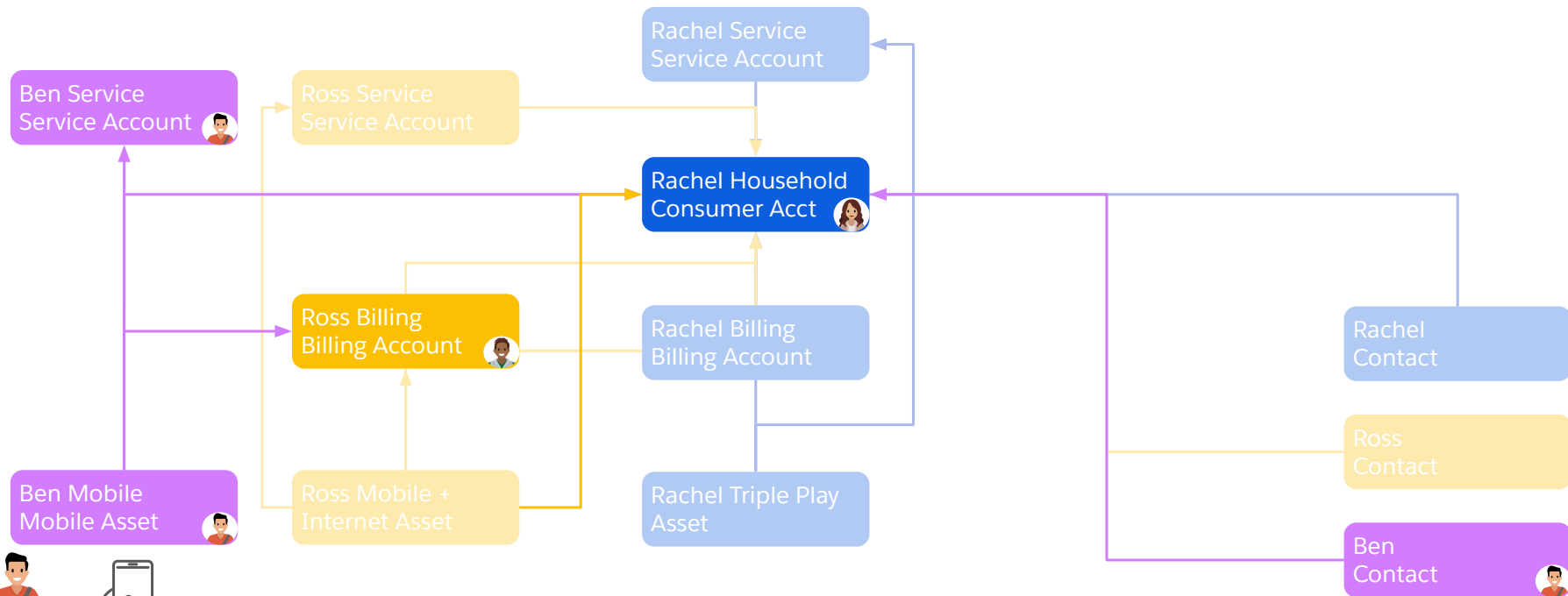
Let's map this to a real use case



Example Customer Structure

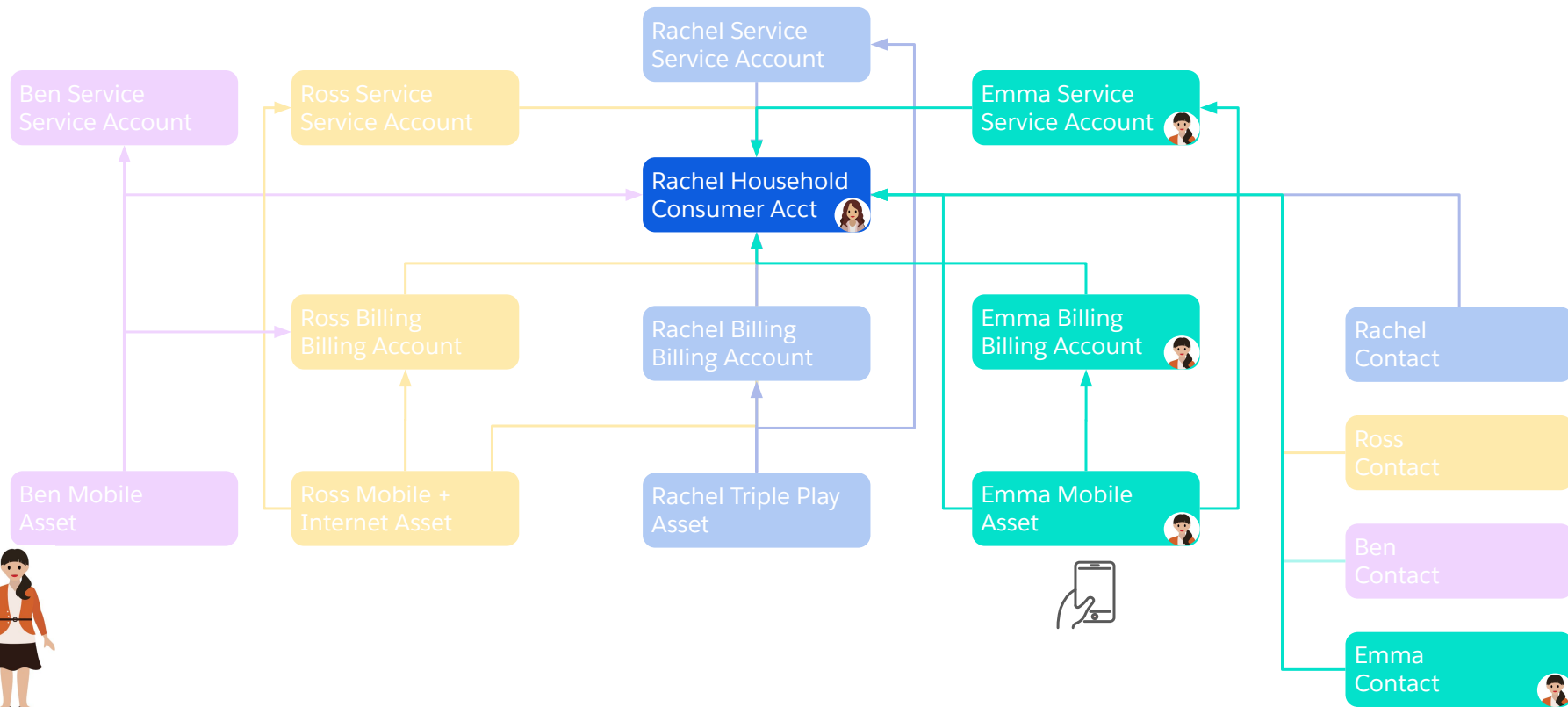


Let's map this to a real use case



Example Customer Structure

Let's map this to a real use case



Advanced Topics



For those of you coming from Industry Cloud managed packages

Affinity Group (Household Object): In managed package, the Household object was used for loose groupings of people, e.g. students living in the same house or members of a sports league. Financial Services, Health, and Public Sector have a standard Household object - not yet available in Communications, Media, or Energy & Utilities.

Party Model: Allows for Account-To-Account and Contact-To-Contact relationships. Use Account Relationships and Account Contact Relationships instead.

Subscription: A grouping mechanism for assets that can have a separate grouping than based on the Service Account. No direct equivalent on Core.

Premises / Service Point: Key for Energy & Utilities, can represent an address that service can be provided, and Service Points as the utility meters. Use Locations for premises and create a child custom object for Service Points.

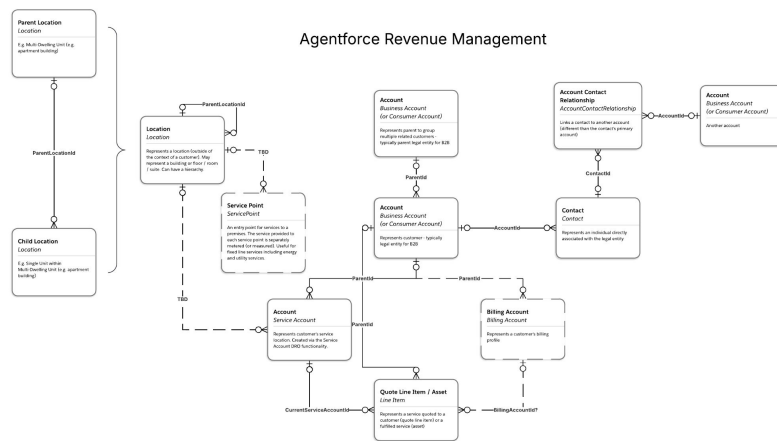
Entity Relationship Diagrams (ERDs)

Feel free to clone and leverage as an artifact on your project!



Customer Model

These diagrams show the customer data model for Communications Cloud.
Agentforce Revenue Management refers to Revenue Cloud for Communications Cloud where the new Core Revenue Cloud solution is used.
Managed Package refers to the Vlocity Communications Cloud Managed Package (vlocity_cmt)



Key Takeaways



What did we learn?

Industry Cloud data models build on the foundation of Sales Cloud & Service Cloud

Customers are more than just an Account and Contact

Account hierarchies are powerful - owners and users

New standard objects - Billing Account and Location

Always consider limitations - **remember Person Accounts!**

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