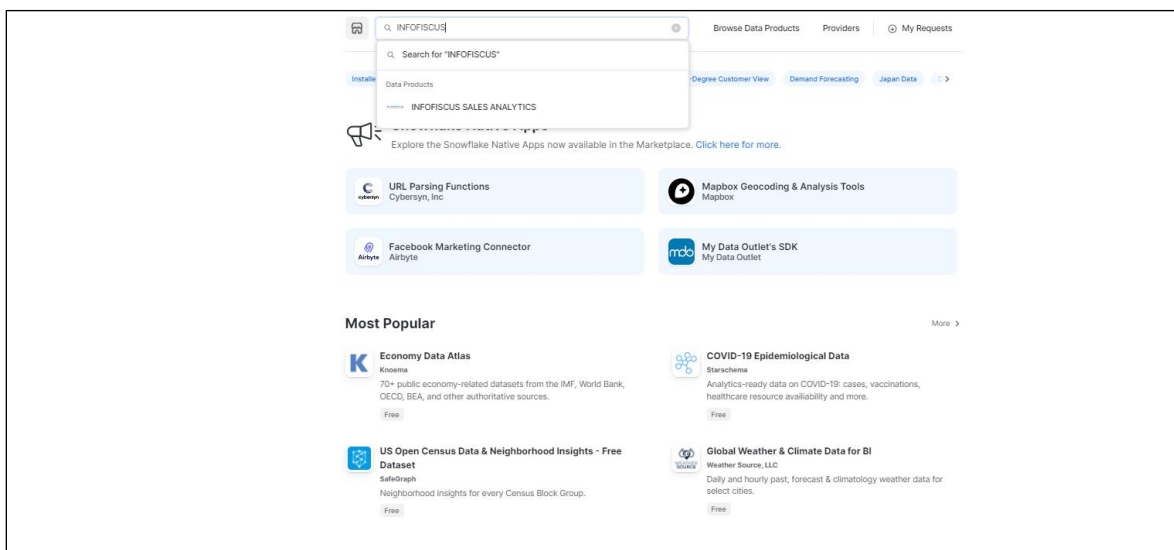


The **InfoFiscus Sales Analytics** solution is a pre-built, comprehensive analytics tool available as a native application in the Snowflake Marketplace. Designed to empower customers, the InfoFiscus Sales Analytics Snowflake App offers robust insights in Sales, Marketing, Finance, and Supply Chain analytics. It seamlessly integrates with industry-standard ERPs, CRMs, and forecasting applications.

Our Sales Analytics native application eliminates the need for customers to invest time and resources in designing and building an end-to-end data warehouse and visualization platform. Instead, InfoFiscus efficiently synchronizes data from Salesforce to Snowflake, computing critical metrics in near real-time. This provides in-depth, detailed, and cognitive analytics essential for Sales operations and executive decision-making.

Installation Process:

- Before Installation, make sure you have a paid Snowflake account and follow the instructions below
- <https://other-docs.snowflake.com/en/collaboration/consumer-listings-paying>
- After you finish all the prerequisites mentioned above. Go to Marketplace and search for “**INFOFISCUS SALES ANALYTICS**” then click on Get to install the application. Before that make sure to enable the anaconda package. Here is the link to help you with that <https://docs.snowflake.com/en/developer-guide/udf/python/udf-python-packages>



INFOFISCUS SALES ANALYTICS USER_GUIDE

The screenshot shows the Snowflake Marketplace listing for 'INFOFISCUS SALES ANALYTICS' by Infometry. The listing includes a search bar at the top, a 'Browse Data Products' button, and a 'My Requests' button. The main content area features the app's logo, name, and version (V1_0.9, released 2 weeks ago). A '30 Days Free' badge is prominently displayed, along with a 'Trial Available' status and a 'Manage Listing' button. The subscription price is listed as '\$500/month'. Below this, there are links for 'Economy', 'Help', 'Contact Infometry Sales', 'Documentation', and 'Contact Infometry Support'. A 'Geographic Coverage' section indicates 'Global' coverage. The description highlights that the solution is a pre-built, comprehensive analytics tool available as a native application in the Snowflake Marketplace, designed to empower customers by offering robust insights in Sales, Marketing, Finance, and Supply Chain analytics. It also mentions that the native application eliminates the need for customers to invest time and resources in designing and building an end-to-end data warehouse and visualization platform.

The screenshot shows the 'Installed Apps' table in the Snowflake interface. The table has columns for 'TITLE', 'OWNER', 'VERSION', and 'INSTALLED'. A single row is visible for 'INFOFISCUS SALES ANALYTICS' by 'Infometry', with version 'V1_0.3' and status 'Installing'. A 'Trial Available' badge is present next to the app title. The interface also includes a search bar and a 'Source All' button.

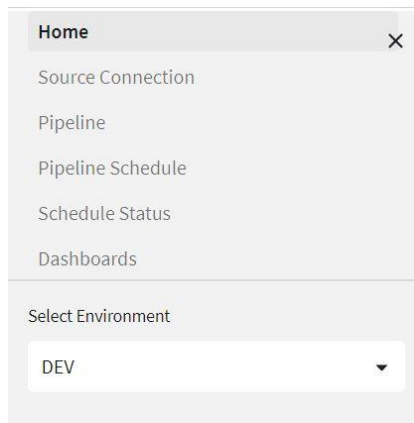
- Once the app is installed you can click on the application and navigate to the Home page

Home Page:

- When you will come to Home page for the very first time you need to click on the “Grant Privileges” (one time action) button to provide the application with account-level privileges.

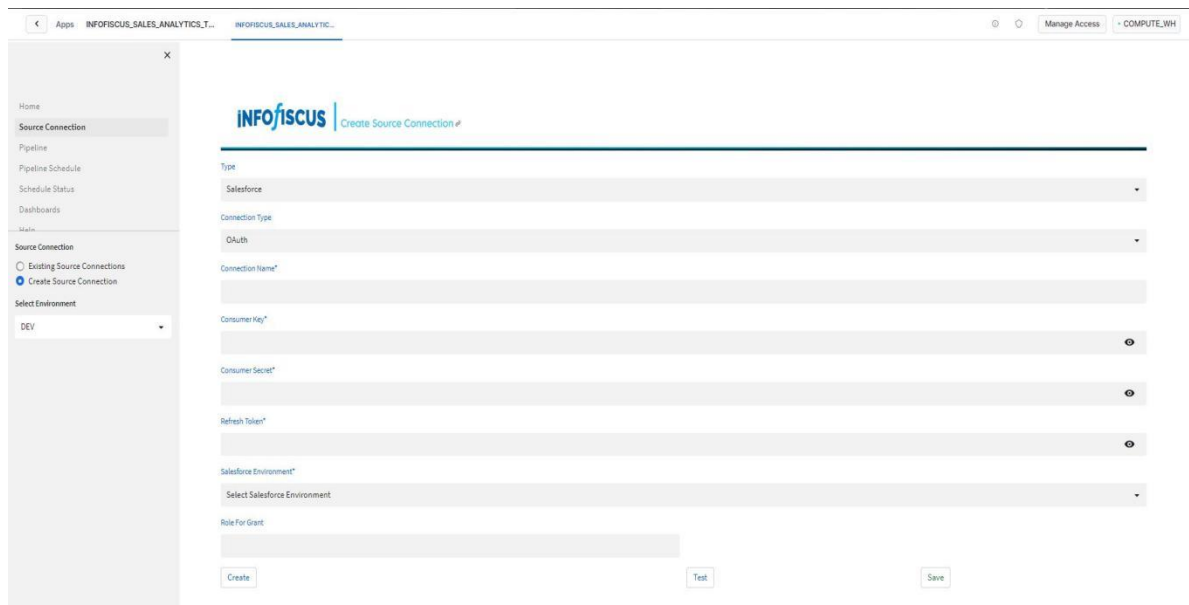
The screenshot shows the Snowflake Home page with a sidebar on the left containing navigation options: Home, Source Connection, Pipeline, Pipeline Schedule, and Select Environment (set to DEV). The main content area features a large banner for 'INFOFISCUS' with a bar chart. A dialog box is open on the right, titled 'The app would like the following account level privileges'. It lists two privileges: 'CREATE DATABASE' (Creation of databases to store sales analytics data) and 'EXECUTE TASK' (Execute InfoFiscus ETL tasks to load the data from source into the snowflake). The dialog box has 'Learn more', 'Cancel', and 'Grant Privileges' buttons.

- **Environment:** Choose a suitable environment (Such as QA, DEV, and PROD) because the selected environment will be carried forward to the subsequent stages in the application.

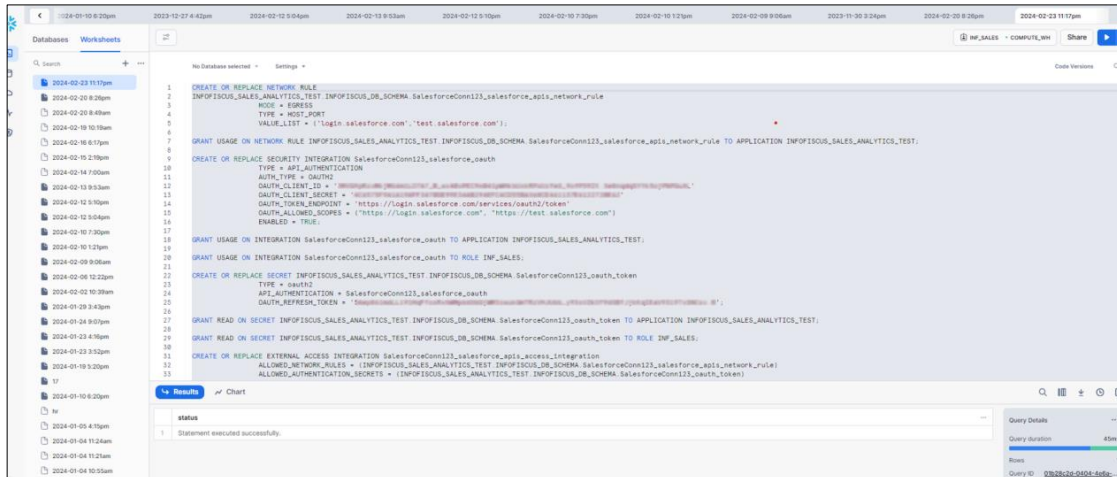


Source Connection:

- Navigate to Source Connection and select Create Source Connection from the left menu.
- In Create Source Connection fill all the connection attributes then click on Create button.
- Then select all the content and create a new SQL worksheet in your Snowflake account and execute all the commands at a time.



INFOFISCUS SALES ANALYTICS USER_GUIDE



- Then go back to the application and click on the Test button to test your connection.
- Once, the Test is successful you need to copy another command and execute it in your SQL worksheet.



- Then click on the Save button to save your connection.
- You can select “Existing Source Connection” from the left menu to see all your pre-existing connections. Here you have the option to edit or delete connections.



Pipeline:

- A data pipeline is a set of processes to automate data flow from a selected source connection to the destination.
- To create a pipeline, enter the appropriate pipeline name and select the source connection for which the pipeline will be created.
- The pipeline will help us to load historical and incremental data into Snowflake.



- In existing pipelines, we can see the already created pipelines, that we can edit or delete.



Pipeline Schedule:

In Pipeline Schedule you create Tasks which enable you to set up automated workflows and ensure that specific actions occur at scheduled times .

- **Pipeline Name:** Choose the Pipeline name for which the task should be scheduled.
- **Load Type:** Choose the appropriate load type (Bulk/Incremental).
- **Task Name:** Provide the appropriate task name.
- **Scheduling interval:** Select the appropriate interval (such as once, daily, monthly, etc.) for the task to be executed.
- **Time Zone:** Choose the suitable Time Zone from the given drop-down.

- **Schedule date and Schedule time:** Specify the date and time from when we want the task to be executed.

The screenshot shows the 'Create New Schedule' interface. On the left is a navigation sidebar with options like Home, Source Connection, Pipeline, Pipeline Schedule, Schedule Status, Dashboards, and Help. The main content area has the title 'INFOFISCUS | Create New Schedule'. It contains several form fields: 'Pipeline Name' (a dropdown), 'Load Type' (a dropdown), 'Task Name' (a text input), 'Scheduling Interval' (a dropdown), 'Custom Interval' (a text input), 'Time Zone' (a dropdown), and 'Schedule Date (YYYY-MM-DD)' and 'Time' (two dropdowns). At the bottom, there is a 'Schedule' button.

- In existing tasks, we can see the already created task names. Where you can have option to edit or delete, pause or resume task.

The screenshot shows the 'Existing Schedules' interface. On the left is a navigation sidebar with options like Home, Source Connection, Pipeline, Pipeline Schedule, Schedule Status, Dashboards, and Help. The main content area has the title 'INFOFISCUS | Existing Schedules'. It displays a table with one row containing the schedule name 'infofiscus_taskpipeline_bulk_load_DEV' and four action buttons: 'edit', 'delete', 'pause', and 'resume'.

Schedule Status:

In Schedule Status section, you'll find comprehensive details about all your task. You can click on the drop-down and select your task. This dedicated page provides an overview of your Snowflake tasks, including their current status, scheduled timings, and pending actions. It serves as a centralized hub for monitoring and managing the execution of tasks, offering insights to help streamline your workflow and ensure efficient task completion.

The screenshot shows the 'Schedule Status' interface. On the left is a navigation sidebar with options like Home, Source Connection, Pipeline, Pipeline Schedule, and Select Environment. The main content area has the title 'INFOFISCUS | Schedule Status'. It displays a table with columns: TASK_NAME, TABLE_NAME, STATUS, INSERT_COUNT, UPDATE_COUNT, START_TIMESTAMP, and END_TIMESTAMP. The table contains one row with the task name 'infofiscus_sfdc_to_snowflake_bulk_load_DEV' and status 'Running'.

TASK_NAME	TABLE_NAME	STATUS	INSERT_COUNT	UPDATE_COUNT	START_TIMESTAMP	END_TIMESTAMP
0 infofiscus_sfdc_to_snowflake_bulk_load_DEV		Running	0	0	2024-03-04 21:01:05	2024-03-04 21:01:05

Dashboards:

Dashboards provide a visual representation of data, making it easier to understand and interpret complex information. Visualizations, such as charts, graphs, and gauges, help users quickly grasp key insights.

