**Documentation Salesforce to Snowflake via Fivetran**

**Introduction to salesforce developer’s edition**

1. We can create a *free lifetime salesforce Developer account* via this link <https://developer.salesforce.com/>
2. We need to signup for it and we will get a developer’s account.
3. This developer’s edition will give only 15000 api call per day for tranfering data to snowflake.
4. This link shows how many api calls we are getting in different version. <https://developer.salesforce.com/docs/atlas.en-us.salesforce_app_limits_cheatsheet.meta/salesforce_app_limits_cheatsheet/salesforce_app_limits_platform_api.htm>
5. To find no. Of api calls consumed go to settings icon on top right-> setup->on next page on left sidebar search for company information -> inside conpany info. We will find api request consumed in last 24 hours.

**How to load Data In Salesforce**

Salesforce is already having some data fields inside its obejcts (*the tabs shown in menu are the object/table of salesforce example: Leads, accounts* ).

However we can add new data to these objects via **data import wizard.**

1. See this video on how to use data import wizard. <https://www.youtube.com/watch?v=qIiWVz8EA74>
2. This data import wizard only accepts csv files. So we cannot use any other file format to upload data to salesforce.
3. This link from salesforce community discussion supports/ confirm point no. 2 <https://success.salesforce.com/answers?id=9063000000159enAAA>
4. This wizard is used for bulk load of data into the objects/tables.

**How to Load Data Into SnowFlake Via Fivetran**

1. Firstly create a schema inside a database in Snowflake.
2. Also Check if the schema has Fivetran\_role ower. If not change the ownership to FIVETRAN\_OWNER.
3. In my case in am using Schema “SURF” inside database USE\_CASE.
4. Once this is done we need to go to Fivetran for making connections.
5. Once logged into the fivetran. You need to make a new connection.
6. So for that you need to select a warehouse first. This warehouse is already there in Snowflake.
7. Once the warehouse is selected. You need a connector.
8. On the top right you will see a **Connector button**. Click on the button and search for salesforce.
9. Click on the Salesforce and it will take you to a page where you can make a connection between Salesforce and Snowflake.
10. You need to add the Destination Schema( In my case it is SURF). This is the same schema which we have made above or want to target to store tables.
11. Add the schema name and Click on Authorize button.
12. Now this **Authorize** button will detect your salesforce username and password. In my case it automatically detects my Salesforce account. However, it might asked for credentials as well.
13. Once Authorization is completed. Click on **Save & Test** Button. This will check if the connection successfully happend.
14. Once it is done click on view connector on the left side. A pop will occur on the next screen. Click OK button on that pop up.
15. Scroll Down to see the tables/objects of Salesforce. Untick those tables which you do not want to transfer.
16. Once this is done. Go to top, on the top right a sync button is there. Enable that button and a syncup will be initiated.
17. Fivetran suggested that sometime sync process takes time. Once sync is done it will automatically send data to snowflake.

Future Features in Fivetran:

1. LOGs will be available to us. To monitor our data and errors.

This is the detailed Documentation on SFDC to Snowflake integration. However, I will keep on adding points to this DOC as and when required.