

**ZUORA SETUP GUIDE**

**The Below requirements are needed to establish a connection zuora.**

**Prerequisites**

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To connect Zuora to Fivetran, you need a Zuora account.

**Setup Guide**

1. Create an API user role

* Note: This role is only for API access, not for general use.
* Log in to your Zuora acccount.
* In the top right corner of the Zuora dashboard, select Settings > Administration Settings.
* Select Manage User Roles.
* Select Add new role to create a new role.

1. Assign the role to a user

* From the administration page, click Manage Users.
* Click add single user.
* Create a user and assign it to the role you created in Step 1.
* You will receive an email with activation instructions. Follow them to activate your API user.

1. Create Client ID and Client Secret

* From the administration page, click Manage Users.
* Click on User Name.
* Enter a client name and description.
* Click create.
* A pop-up will open with your Client ID and Client Secret.
* Make a note of your Client ID and Client Secret because they will never be shown again. You will need them to configure Fivetran.

1. Finish Fivetran configuration

* In the connector setup form, enter the Destination schema name of your choice.
* Enter the Client ID and Client Secret you found Step 3.
* (For Zuora Sandbox connector) Select your Environment: Sandbox or Central Sandbox.
* If you have the multi-entity feature enabled, set the Is Multi-entity feature enabled toggle to ON.
* Click Save & Test. Fivetran will take it from here and sync your data from your Zuora account.

