

# Activate Your Pre-Built Salesforce Workbooks

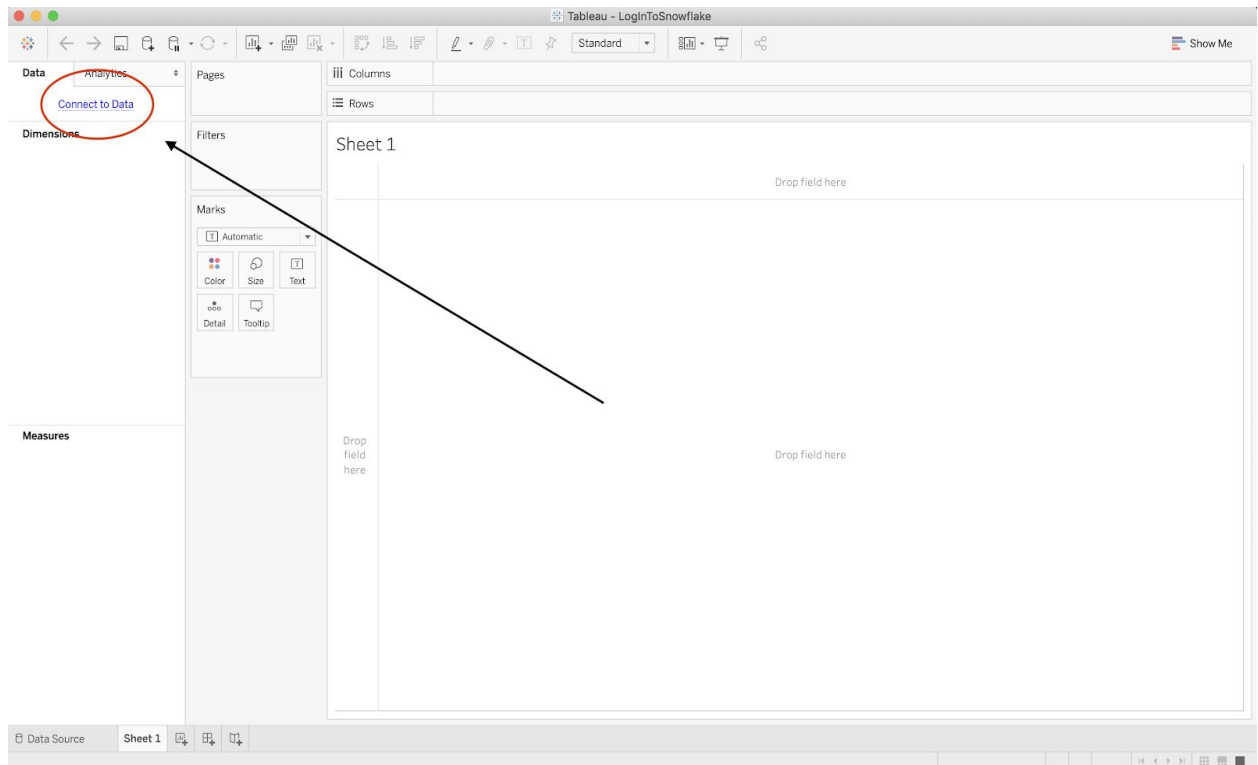
Please follow the steps below to set up your pre-built Salesforce workbooks.

Pre-requisites:

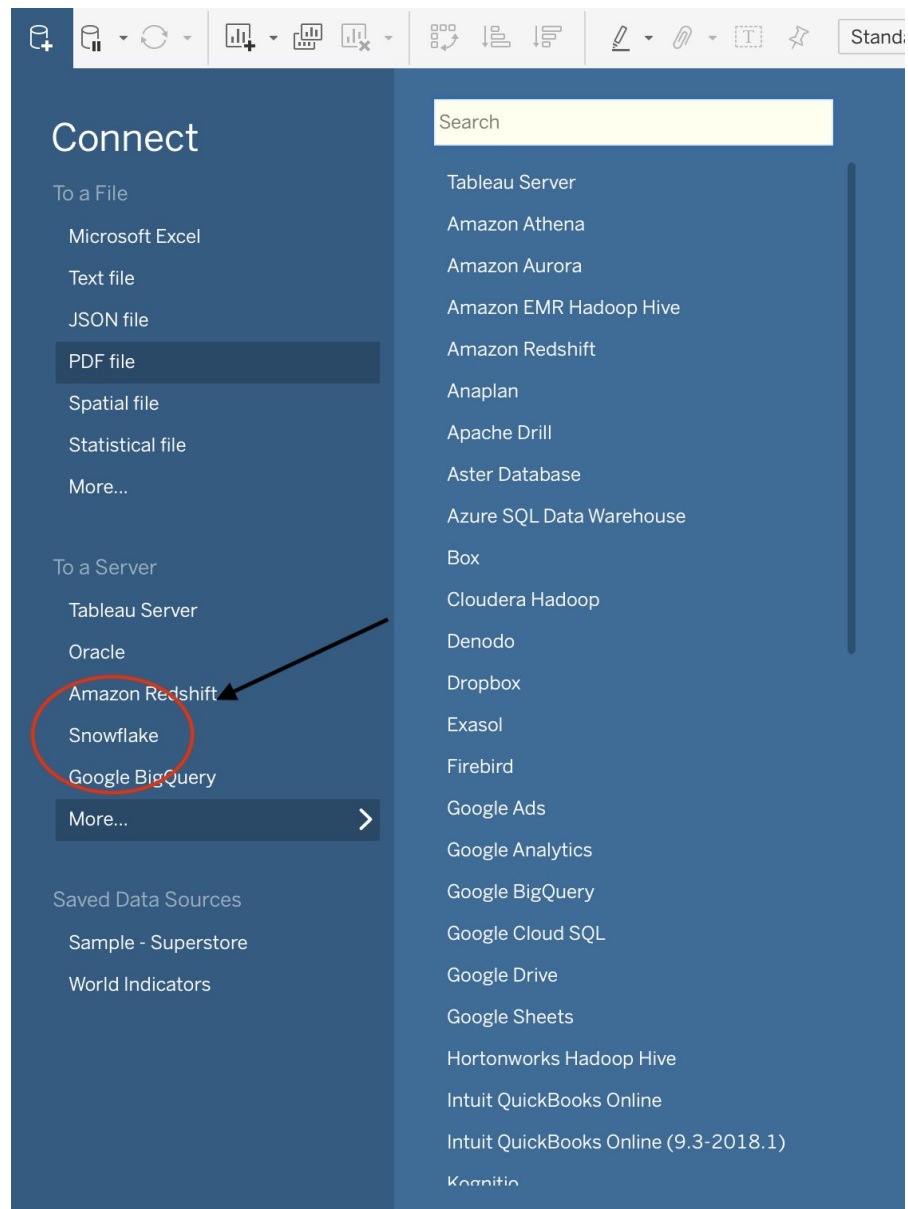
- ❖ A Snowflake data warehouse set up with Salesforce data delivered by Fivetran
  - ❖ Snowflake driver installed: <https://www.tableau.com/support/drivers>
  - ❖ Python 2 installed (already installed if using Mac OSX)
    - If you do not have Python 2 installed, visit:  
<https://www.python.org/downloads/release/python-2715/>
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Set-up:

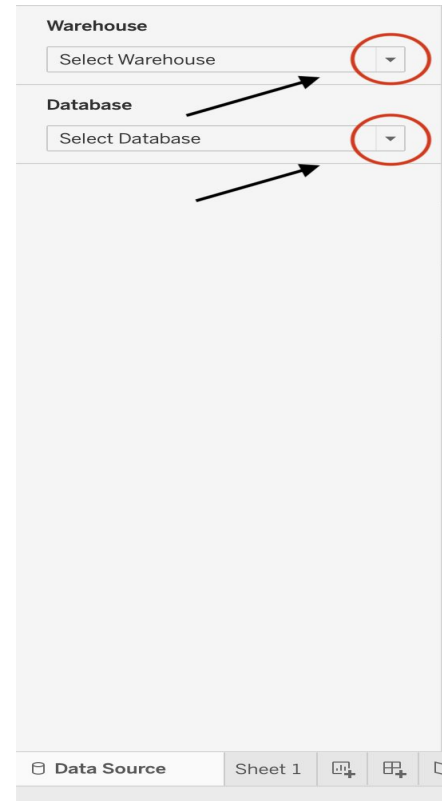
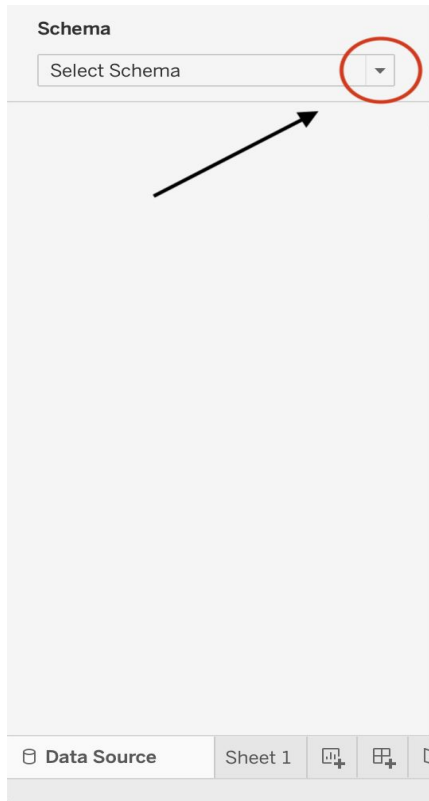
1. Unpack the ".zip" file by double clicking it and open the "Tableau\_Activation" folder.
2. Open the Tableau Workbook called "LogIntoSnowFlake.twb".
3. Click "Connect to Data"



4. Connect to the correct Snowflake server that contains your Salesforce data.



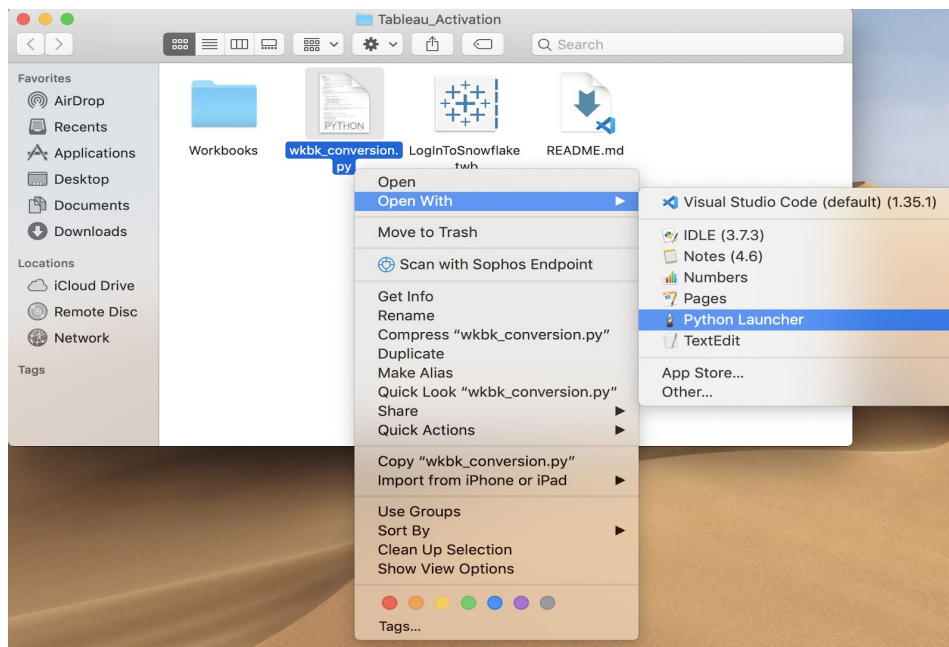
5. Connect to the corresponding Warehouse, Database, and then Schema that holds your Salesforce information. After you have completed this step, save and close the workbook.



## 6. Run the Python script in the "Tableau\_Activation" folder

### a. On a Mac:

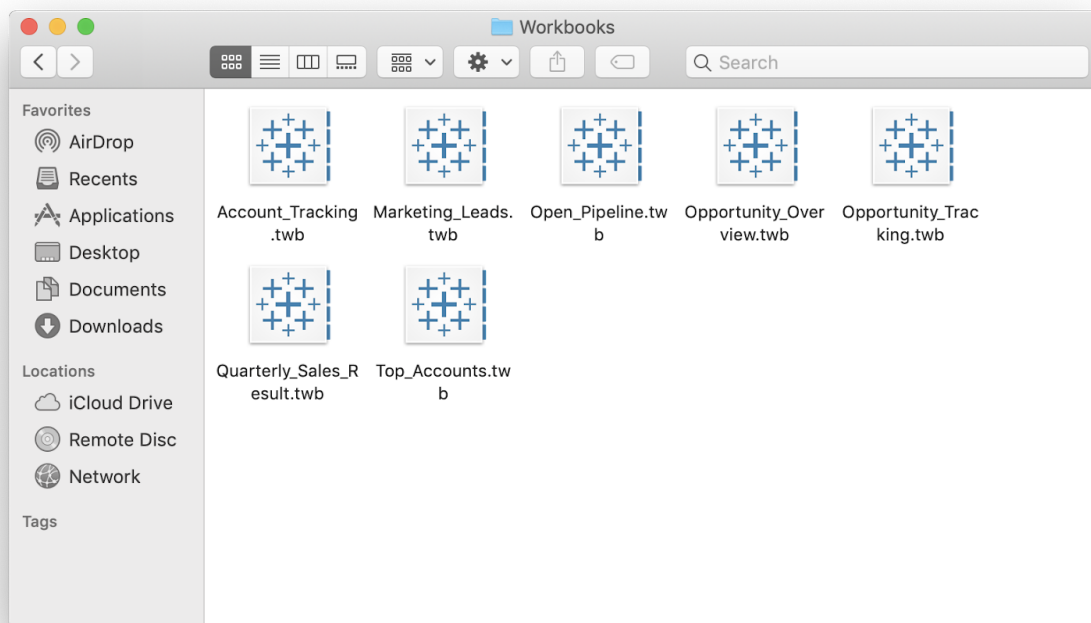
- ❖ Right click "wkbk\_conversion.py" in the "Tableau\_Activation" folder
- ❖ Hover over "Open With",
- ❖ And select "Python Launcher"



b. On Windows or Linux:

- ❖ Open up the Terminal, or Command Prompt on your computer:
  - Windows:  
<https://www.lifewire.com/command-prompt-2625840>
  - Linux: "Ctrl"+"Alt"+"T" or  
<https://askubuntu.com/questions/196212/how-do-you-open-a-command-line>
- ❖ Navigate to the Tableau\_Activation directory using the "cd" command
- ❖ Run the command "python wkbk\_conversion.py"

7. Open up the "Workbooks" folder. The seven Tableau Salesforce starters will be connected live to your Snowflake Warehouse and will prompt you for your Snowflake credentials once opened.



8. Upon opening a workbook, you may encounter a “Custom SQL Warning” that looks like the following. This is nothing to worry about, simply click “Yes”.

