Automatically Port Salesforce Workbooks to Snowflake

Please follow the steps below to port your Salesforce Tableau workbooks.
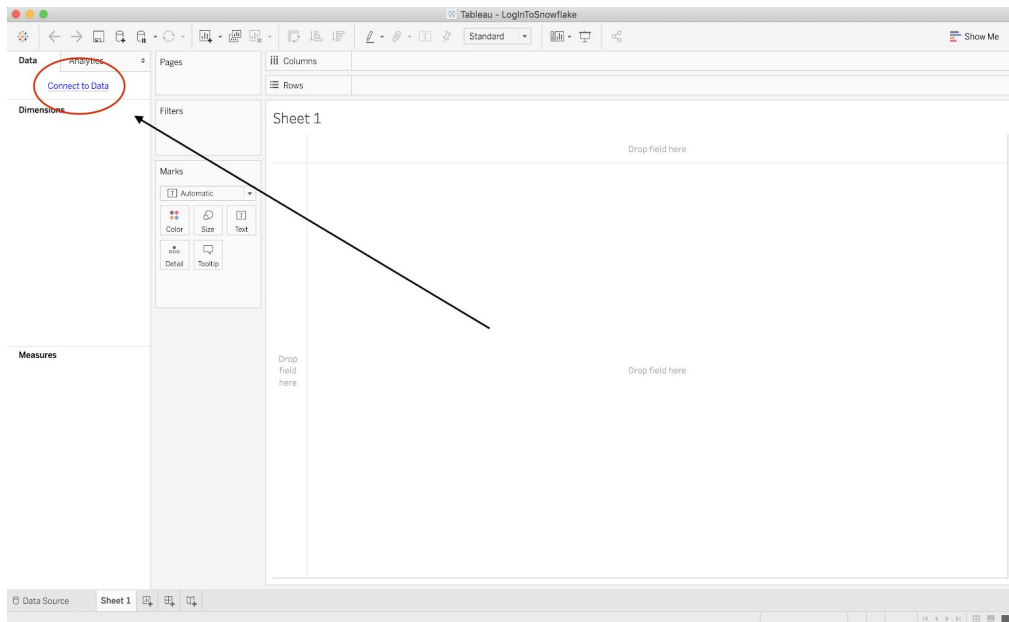
Pre-requisites:
- ❖ A Snowflake data warehouse set up with Salesforce data delivered by Fivetran
- ❖ Snowflake driver installed: https://www.tableau.com/support/drivers
- ❖ Python 2 installed (already installed if using Mac OSX)
  - ➢ If you do not have Python 2 installed, visit:
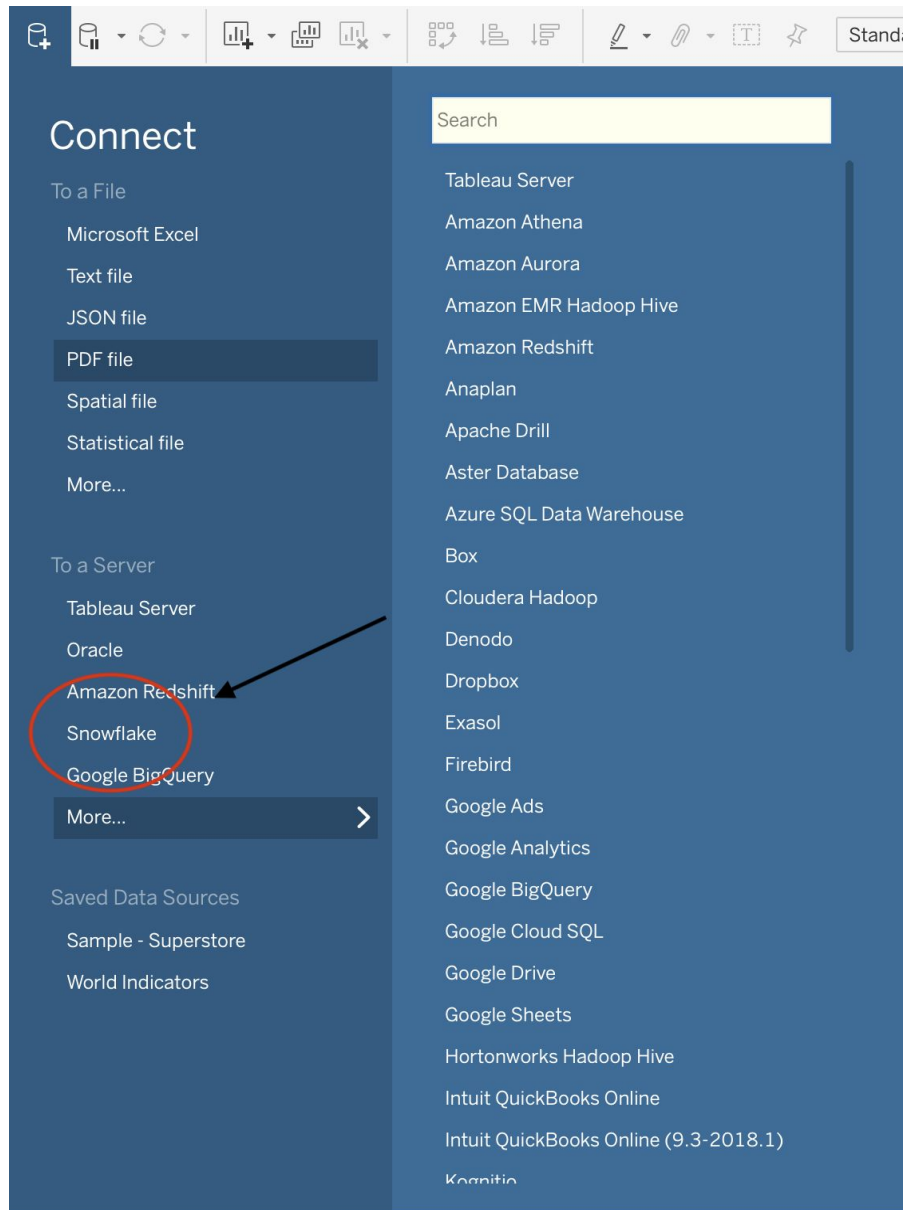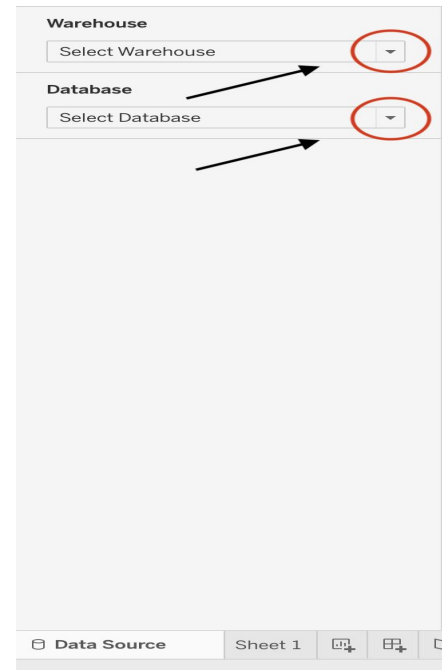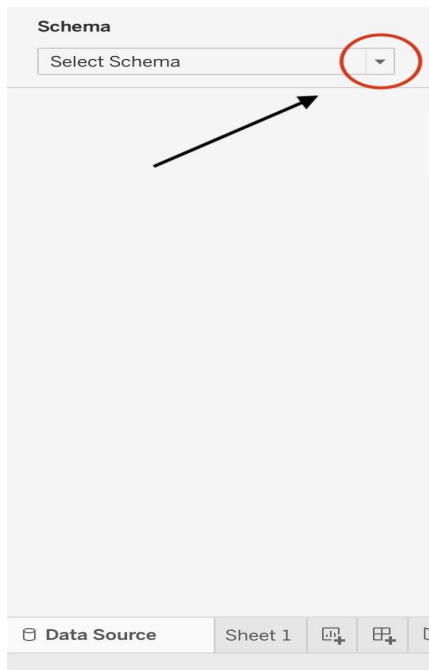   https://www.python.org/downloads/release/python-2715/

Setup:

1. Double-click the **.zip** file to unpack it, and open the **Tableau_Activation** folder.

2. Open the Tableau Workbook **LogInToSnowFlake.twb**.
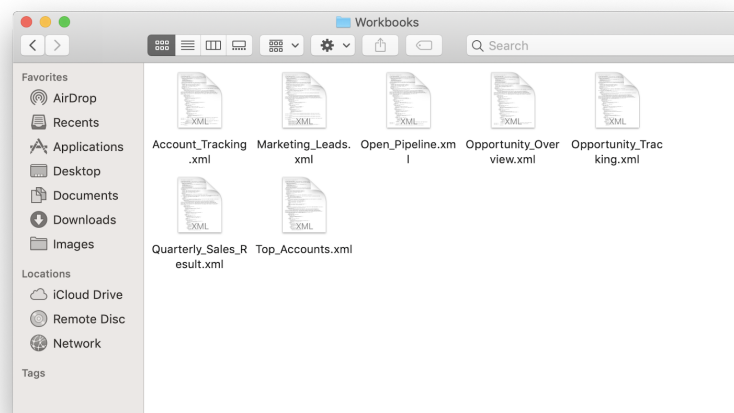
3. Click **Connect to Data.**

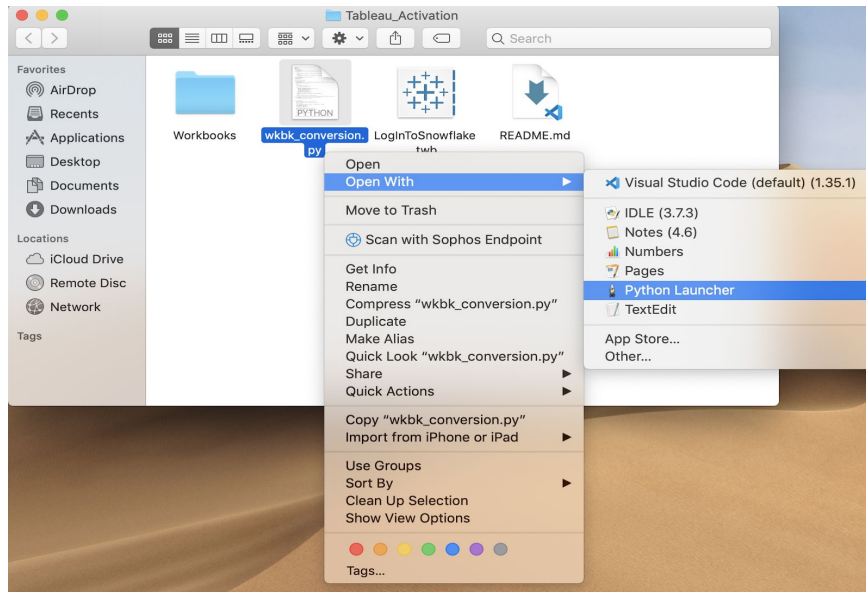4. Connect to the Snowflake server that contains your Salesforce data.

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. Add any Tableau Workbook Connected to Salesforce to the **Workbooks** folder. By default, the Salesforce starters pre-made by Tableau will already be in this folder. (The original files are offered by Tableau at the following link: https://www.tableau.com/products/dashboard-starters-zip?signin=aa0b2ea36b0cd57ccf17197a0aa2fc98)
   a. Note: The Tableau Workbook needs a file extension of **.twb** or **.xml** for the script to work. If the workbook has a file extension of **.twbx** then follow these steps:
      ❖ Before adding the file to the **Workbooks** folder, rename the file to **.zip** and double click to unpack it
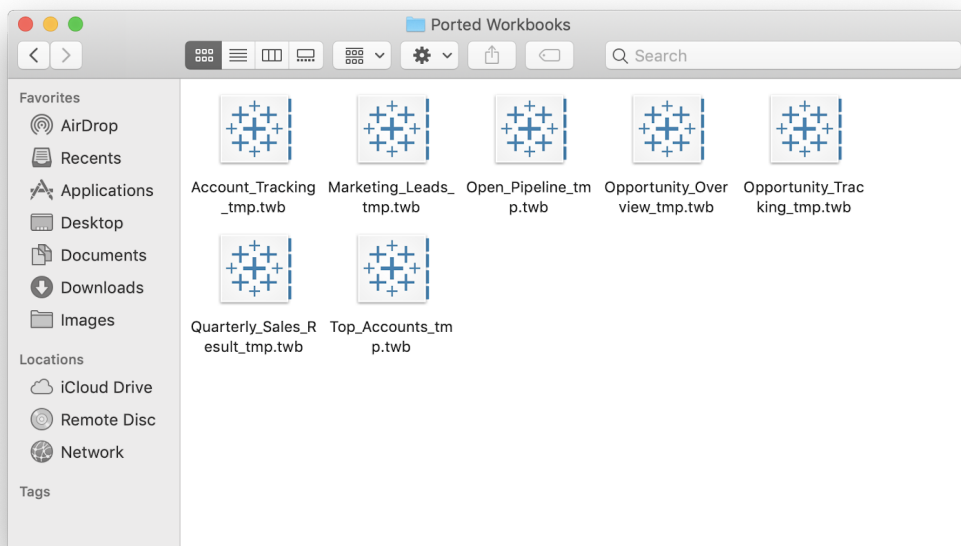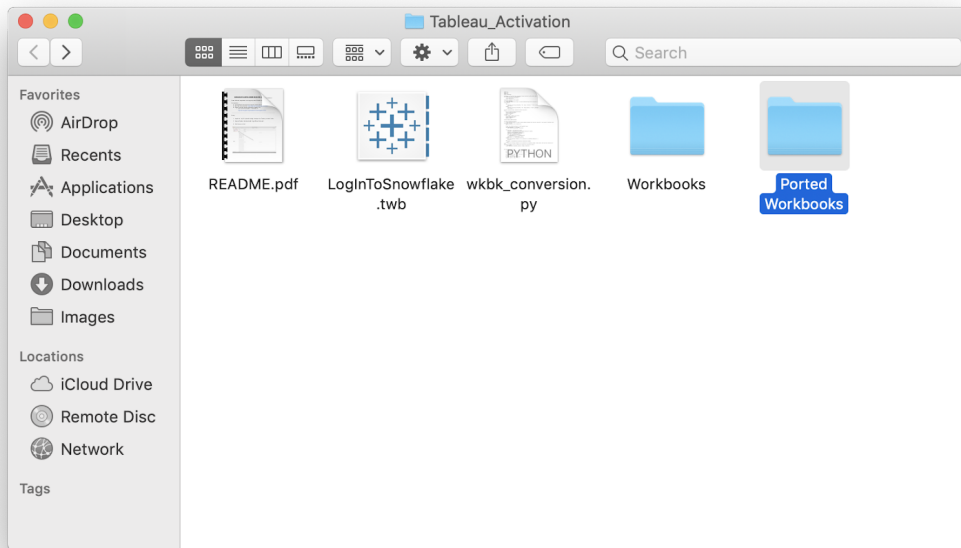   ❖ Open the folder and drag the **.twb** file into the **Workbooks** folder

7. 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 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 the new **Ported Workbooks** folder. The seven Tableau Salesforce starters and any other Tableau Workbooks that you added to the **Workbooks** folder 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**. This is nothing to worry about, simply click **Yes**.

Custom SQL Warning

⚠️ This document contains one or more custom SQL connections or pass through SQL functions. Do you want to connect?

SQL Statements:

```
SELECT *
FROM SALESFORCE.PRICEBOOK_2
WHERE NOT IS_DELETED
```

No   Yes