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1 What's New

New features in ODBC Driver for Salesforce 3.3

- Added support for macOS ARM (Apple Silicon M1 and M2)
- Improved compatibility with 4D in macOS

New features in ODBC Driver for Salesforce 3.2

- Added support for multilevel relations in SOQL queries
- Added support for SQL_ATTR_MAX_ROWS attribute
- Improved compatibility with Visual Basic in Visual Studio
- Improved compatibility with Linked Server in SQL Server
- Improved compatibility with Alteryx

New features in ODBC Driver for Salesforce 3.1

- Added support for macOS 13 Ventura
- Improved compatibility with Tableau Prep Builder
- Improved compatibility with Crystal Reports

New features in ODBC Driver for Salesforce 3.0

- macOS 64-bit is supported
- Linux 64-bit is supported

New features in ODBC Driver for Salesforce 2.2

- Added support for Windows 11
- Improved compatibility with Linked Server in MSSMS
- Improved compatibility with FICO Mosel
- Improved compatibility with FileMaker
- Improved support for an ODBC installer on Windows 2000

New features in ODBC Driver for Salesforce 2.1

- MSI installer for deploying through GPO is added

New features in ODBC Driver for Salesforce 2.0

- OAuth authorization is supported
- The ability to execute SOQL queries is added

New features in ODBC Driver for Salesforce 1.8

- The ReturnForeignKeys connection option to significantly improve performance is added
- Compatibility with Visual Studio is improved
- SQLProcedures now returns an empty recordset instead of an error
- SQLProcedureColumns now returns an empty recordset instead of an error

New features in ODBC Driver for Salesforce 1.7

- Performance of obtaining metadata is improved
- Support for connection pooling is improved
- Now ODBC driver activation does not require administrator privileges
- The IncludeDeleted connection option, which allows including deleted records into resultsets, is added

New features in ODBC Driver for Salesforce 1.7

- Possibility to force the ODBC 2.x behavior is added

New features in ODBC Driver for Salesforce 1.6

- Possibility to return String Types as Ansi or Unicode is added
- Compatibility with MS Access is improved
- Compatibility with Tableau is improved
- Compatibility with Omnis Studio is improved
- Compatibility with Power Pivot is improved

- Compatibility with DBeaver is improved

New features in ODBC Driver for Salesforce 1.5

- Environment selection is added
- Connection Timeout option is added
- Query Timeout option is added

New features in ODBC Driver for Salesforce 1.4

- Compatibility with SAS JMP is improved
- Compatibility with MS Power Query is improved
- OUTER JOIN macros in SQL queries are supported
- DateTime macros in SQL queries are supported
- Scalar function macros in SQL queries are supported

New features in ODBC Driver for Salesforce 1.3

- Compatibility with MS Visual Studio
- Compatibility with MS FoxPro is improved
- Compatibility with MapInfo is improved
- Compatibility with Libre Office is improved
- Compatibility with Qlik is improved
- Compatibility with Delphi & C++Builder is improved

New features in ODBC Driver for Salesforce 1.2

- Compatibility with MS Excel is improved
- Support for linked tables in MS Access is improved
- Backward compatibility of SQLExecDirect with ODBC 2.x is improved

New features in ODBC Driver for Salesforce 1.1

- Compatibility with Microsoft SQL Server Management Studio is improved
- Compatibility with MS Access is improved

- Compatibility with Microsoft Visual FoxPro is improved
- Columns with the Formula data type support are improved

New features in ODBC Driver for Salesforce 1.0

- License validation is fixed
- First release of ODBC Driver for Salesforce Marketing Cloud
- Windows 32-bit is supported
- Windows 64-bit is supported

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2 General Information

1. Overview
2. Features
3. Compatibility
4. Requirements
5. Licensing
6. Getting Support

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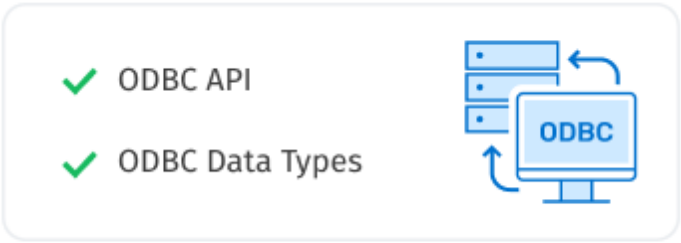
2.1 Overview

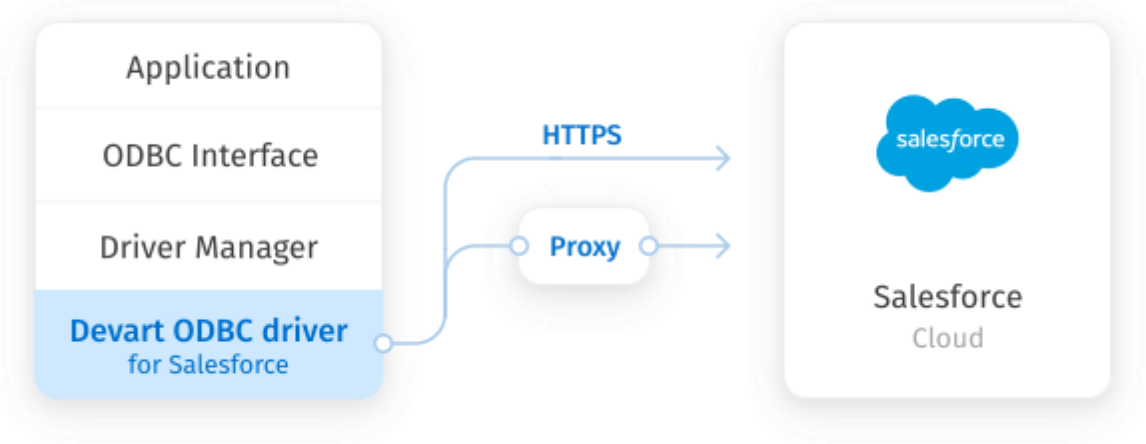
Overview

ODBC Driver for Salesforce is a high-performance connectivity security with enterprise-level features for accessing Salesforce from ODBC-compliant reporting, analytics, BI, and ETL tools on Windows, macOS, and Linux. Our ODBC driver fully supports standard ODBC API functions and data types and enables easy and secure access to live Salesforce data from anywhere.



Connection to Salesforce

Our data connector enables various ODBC-aware applications to connect to Salesforce directly via HTTPS. If you have no direct access to Salesforce via HTTPS, you have the option of establishing a connection through a proxy server.



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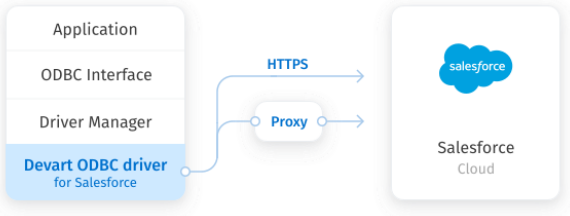
2.2 Features



Connection to Salesforce

Our connectivity solution enables various

	ODBC-aware applications to connect to Salesforce directly via HTTPS. If you have no direct access to Salesforce, you have the option of establishing a connection through a proxy server.

## Extended SQL Syntax 	
 	
Our ODBC driver provides an unrivalled opportunity to work with Salesforce objects just as with SQL tables. The extended SQL syntax allows you to use all the SQL benefits in SQL-92 compatible SELECT statements:
• Complex JOINs
• WHERE conditions
• Subqueries
• GROUP statements
• Aggregation functions
• ORDER statements
• and more.
	``
	select
	  c.FirstName,
	  c.MailingCountry,
	  c.MailingStreet,
	  c.MobilePhone,
	  a.AccountNumber
	from
	  (select
	  FirstName,
	  MailingCountry,
	  MailingStreet,
	  MobilePhone,
	  AccountId
	  from
	  Contact
	  where
	  MailingCountry = 'USA') c
	  left join Account a
	  on c.AccountId = a.Id
	where
	  a.Rating in ('Warm', 'Hot')
	``

DML Operations

Devart ODBC Driver for Salesforce provides support for DML (INSERT, UPDATE, DELETE) operations, which allows you to modify data in Salesforce in the same way as in SQL databases.

Bulk Updates

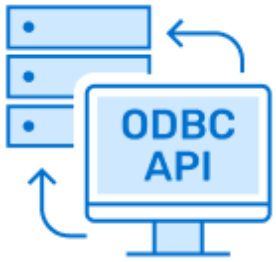
Moreover, with our driver you can perform bulk updates to Salesforce by combining SQL statements into batches, thus simplifying and speeding up large data modification with Salesforce.

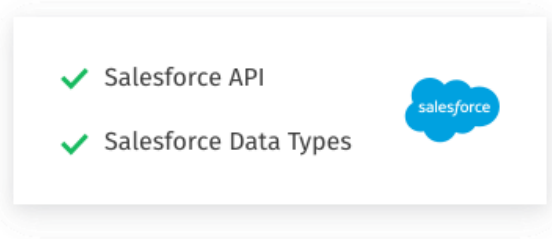
ODBC Conformance

The driver provides full support for common ODBC interface:

- ODBC API Functions support
- ODBC Data Types support

In addition, we provide support for Advanced Connection String parameters. Thus allowing any desktop and web applications to connect to Salesforce from various environments and platforms, that support ODBC.





Salesforce Compatibility

Our ODBC driver fully supports all data types defined in the Salesforce API. Moreover, the driver is compatible with the

	Salesforce API itself.
## Advanced Data Conversion We have implemented advanced Data Conversion mechanisms that provide bi-directional mapping between any Salesforce and ODBC data types.	## Integration The driver is compatible with 3rd-party data analysis tools, such as Microsoft Excel, and integrates with various IDEs and systems like Visual Studio, etc. For a complete list of compatible tools and platforms, see Compatibility.
## Platforms Variety Devart ODBC Driver for Salesforce can be used with 32-bit and 64-bit applications on both x32 and x64 platforms, so there is no need to additionally configure the driver, applications or environment.	## Fully Unicode Driver With our fully Unicode driver, you can retrieve and work with any data from multi-lingual Salesforce databases correctly, not depending on whether its charset is Latin, Cyrillic, Hebrew, Chinese, etc., in any environment localization.
## High Performance Every operation with Salesforce becomes significantly faster using such capabilities of our driver as Local data caching, connection pooling, query optimization and much more.	## Support Visit our Support page to get instant help from knowledgeable and experienced professionals, a quick resolution of your problems, and nightly builds with hotfixes.

Reserved.

2.3 Compatibility

Salesforce Compatibility

Salesforce API	✓
Salesforce Data Types	✓

Supported Platforms

- Windows 32-bit and 64-bit (including Windows Terminal Server)
- Compatible with all Windows versions (Windows 7 and higher) that support .NET 5.0
- macOS 64-bit
- Linux 64-bit

Compatibility with Third-Party Tools

Application Development Tools

Adobe ColdFusion	✓
Embarcadero Delphi & C++Builder UniDAC, FireDAC, dbGo (ADO), BDE and dbExpress	✓
FileMaker	✓
Lazarus	✓
Microsoft Visual FoxPro	✓
Microsoft Visual Studio Server Explorer and ADO.NET ODBC Provider	✓
Omnis Studio	✓
PHP	✓
PowerBASIC	✓

Python	✓

Database Management

Aqua Data Studio	✓
DBArtisan	✓
dbForge Studio	✓
dBeaver	✓
EMS SQL Management Studio	✓
Informatica Cloud	✓
RazorSQL	✓
SQL Server Data Tools	✓
SQL Server Management Studio	✓
SQL Server Reporting Services	✓

BI & Analytics Software

Alteryx	✓
DBxtra	✓
Dundas BI	✓
FICO Xpress Mosel	✓
IBM SPSS Statistics	✓
MicroStrategy	✓
Oracle BI	✓
Power BI	✓

Qlik Sense	✓
QlikView	✓
RStudio	✓
SAP Crystal Reports	✓
SAS JMP	✓
Tableau	✓
TARGIT	✓
TIBCO Spotfire	✓

Office Software Suites

LibreOffice	✓
Microsoft Access	✓
Microsoft Excel	✓
OpenOffice	✓
StarOffice	✓

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2.4 Requirements

The following requirements must be met for ODBC Driver for Salesforce:

- Only one version of ODBC Driver for Salesforce is installed on your system.
- .NET Framework 4.5 or later is installed on your system.

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2.5 Licensing

ODBC Driver License Agreement

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2.6 Getting Support

This document lists several ways you can find help with using ODBC Driver for Salesforce describes the Priority Support program.

Support Options

There are a number of resources for finding help on installing and using ODBC Driver for Salesforce:

- You can find out more about ODBC Driver for Salesforce installation or licensing by consulting Installation and License articles of this manual respectively.
- You can get community assistance and technical support on the Community Forum.
- You can get advanced technical assistance by ODBC Driver for Salesforce developers through the ODBC Driver for Salesforce Priority Support program.

Subscriptions

The ODBC Driver for Salesforce Subscription program is an annual maintenance and support service for ODBC Driver for Salesforce users.

Users with a valid ODBC Driver for Salesforce Subscription get the following benefits:

- Product support through the ODBC Driver for Salesforce Priority Support program
- Access to new versions of ODBC Driver for Salesforce when they are released
- Access to all ODBC Driver for Salesforce updates and bug fixes
- Notifications about new product versions

Priority Support

ODBC Driver for Salesforce Priority Support is an advanced product support service for getting expedited individual assistance with ODBC Driver for Salesforce-related questions from the ODBC Driver for Salesforce developers themselves. Priority Support is carried out over email and has a two business day response policy. Priority Support is available for users with an active ODBC Driver for Salesforce Subscription.

To get help through the ODBC Driver for Salesforce Priority Support program, please send an email to odbc@devart.com describing the problem you are having. Make sure to include the following information in your message:

Your ODBC Driver for Salesforce Registration number.

- Full ODBC Driver for Salesforce edition name and version number. You can find the version number in DLL version information.
- Versions of the Salesforce server and client you are using.
- A detailed problem description.
- If possible, ODBC Administrator Log, scripts for creating and filling in database objects, and the application using ODBC Driver for Salesforce.

If you have any questions regarding licensing or subscriptions, please see the FAQ or contact sales@devart.com

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3 Using ODBC Driver

1. Installation

2. Product Activation
3. Connecting to Salesforce
4. Connection String Options
5. Enabling ODBC Tracing

Using SOQL Queries

6. Supported Data Types
7. Supported ODBC API Functions

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3.1 Installation

ODBC Driver for Salesforce currently supports the following platforms: Windows, macOS, and Linux, both 32-bit and 64-bit.

- Windows - Regular Installation
- Windows - Silent Installation
- macOS
- Linux DEB
- Linux RPM

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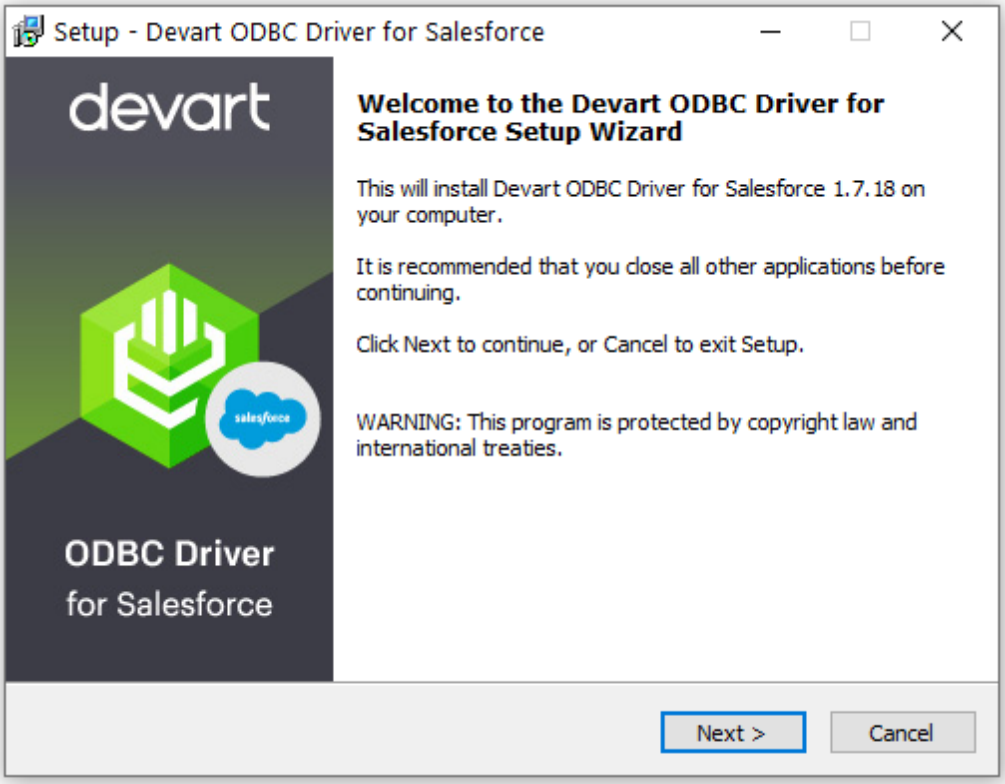
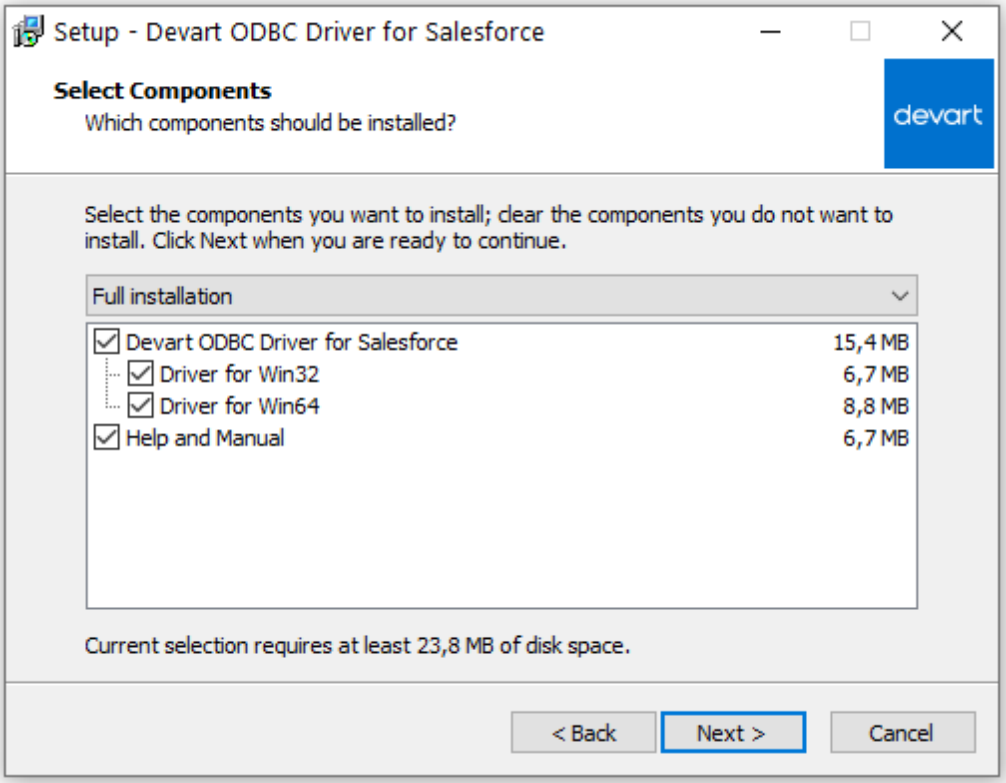
3.1.1 Windows

Installation

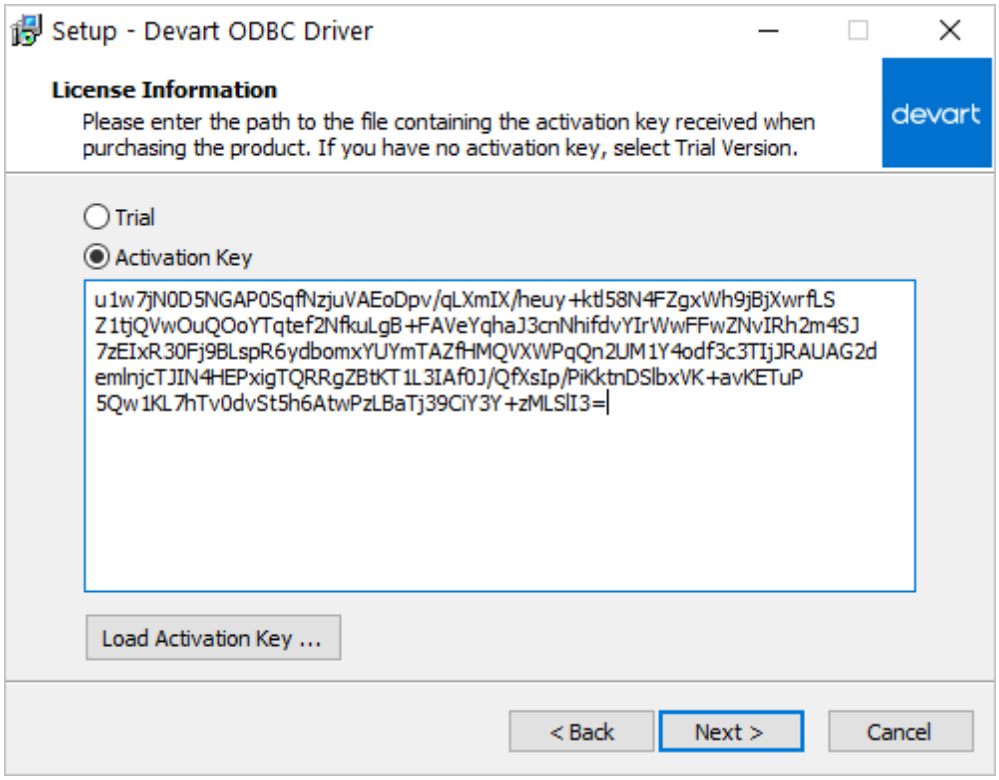
1. Download and run the installer.
2. Follow the instructions in the wizard.



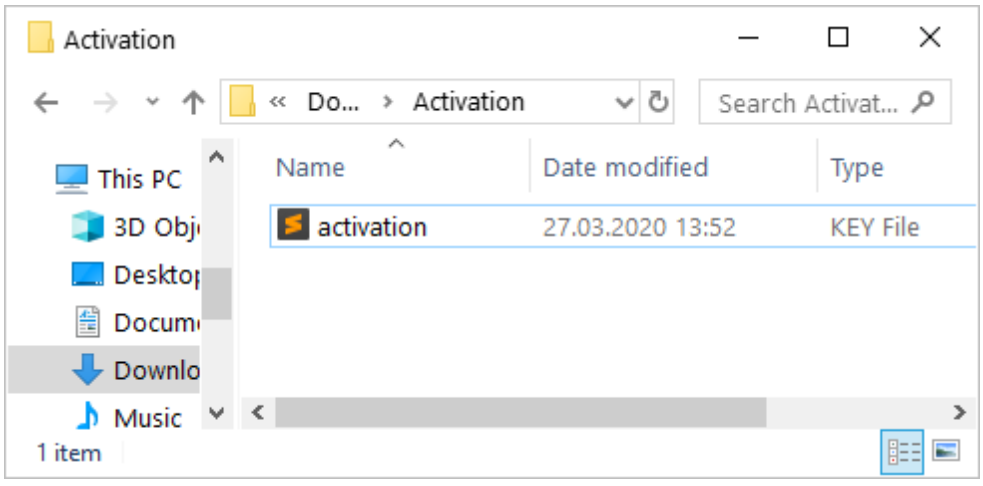
3. In case if you already have the specified installation folder on the PC or another Driver version is installed, you will get a warning. Click **Yes** to overwrite the old files with the current installation, but it is recommended to completely uninstall the previous driver version first, and then install the new one.
4. On the Select Components page you can select whether to install the **64-bit** version of the driver or not. Clear the check box if you need no 64-bit installation. There is also a check box on this page, that allows you to select whether to install Help and Manual.



5. In the License Information dialog box, you should select the license type and activate the product. If you have no activation key, you can select Trial and use the driver for evaluation purposes.
6. If you have an activation key, select the Activation Key option. Copy the activation key from the registration email or your Customer Portal account and paste it into the Activation Key edit box.



7. If you have the activation key file, click the Load Activation Key button and browse to it.



8. Click Next.

9. Click Install, then Finish.

10. After the installation is completed, you need to configure the driver.

See also:

- Installation on macOS
- Install Linux DEB package
- Install Linux RPM package

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3.1.2 Silent

Silent Installation with OEM license on Windows

1. Run the Command Prompt as an administrator.

2. Use the following command-lines to perform the driver silent/very silent installation:

```
DevartODBCSalesforce.exe /SILENT /ActivationKey=y1c7nmgdu234laszxcvONGurjfhx
```

```
DevartODBCSalesforce.exe /VERYSILENT /ActivationKey=ekhdh765mhO9ukr237gfHRtr
```

Note: The installation is performed by entering a license key.

```
DevartODBCSalesforce.exe /SILENT /ActivationFile=d:\lic.key
```

```
DevartODBCSalesforce.exe /VERYSILENT /ActivationFile=d:\lic.key
```

Note: The installation is performed by specifying the path to a license key file with any name.

When /SILENT is used, the installation progress is displayed, but no user interaction is required during installation.

When /VERYSILENT is used, the installation wizard dialog is hidden and the installation process is performed without user interference.

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3.1.3 macOS

Prerequisites

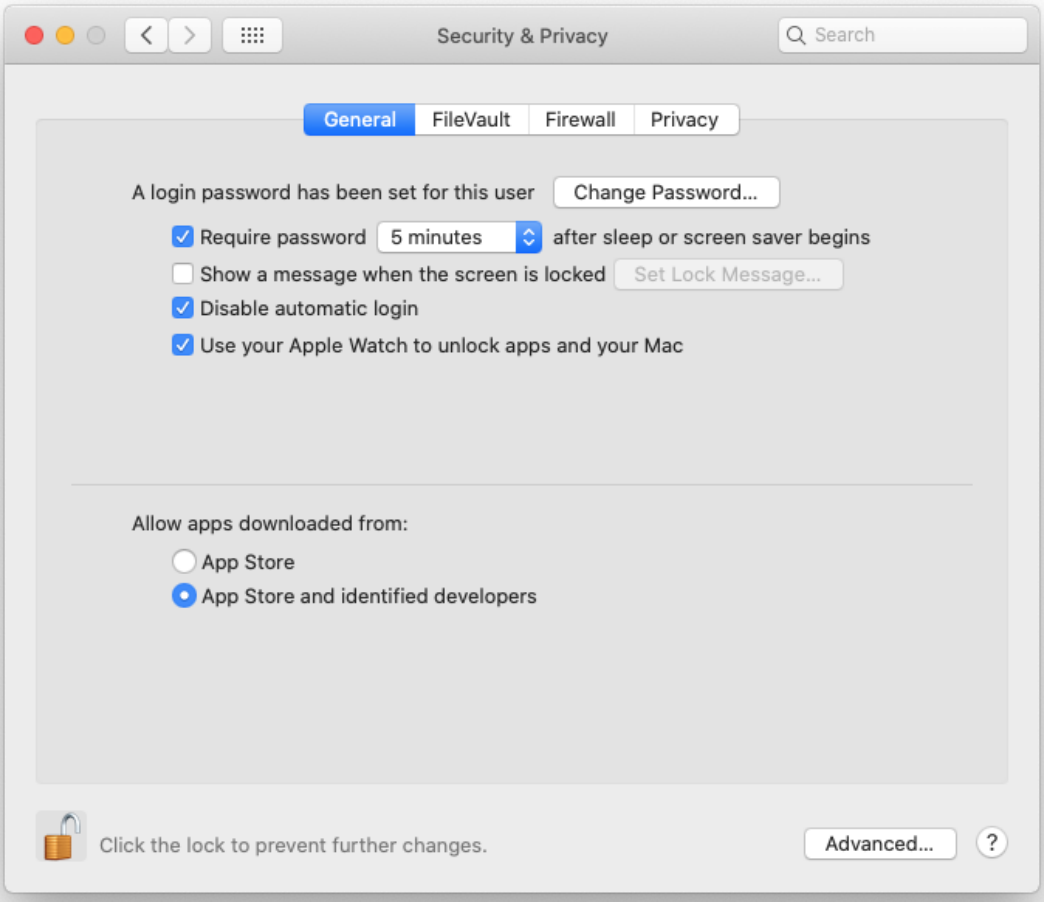
ODBC Driver for Salesforce works under control of an ODBC driver manager. ODBC driver manager is not distributed along with our driver and must be installed separately.

ODBC Driver for Salesforce is compatible with iODBC driver manager.

In case when using other ODBC driver managers, ODBC Driver for Salesforce will be installed, but it will require manual modification of configuration files of these managers.

Installing ODBC Driver for Salesforce

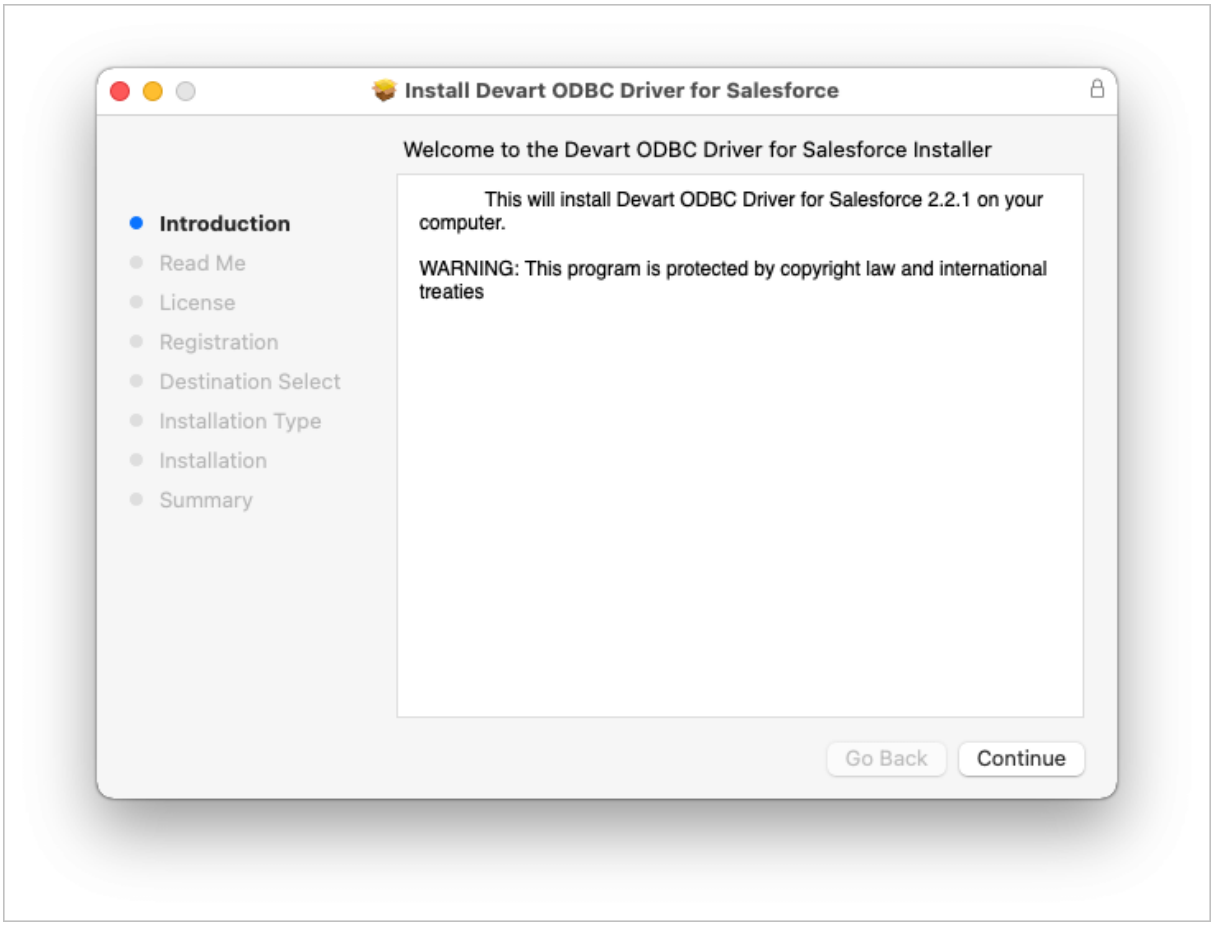
1. Go to Security & Privacy settings in the System Preferences.
2. Enable the *App Store and identified developers* option in the **Allows apps downloaded from** section.



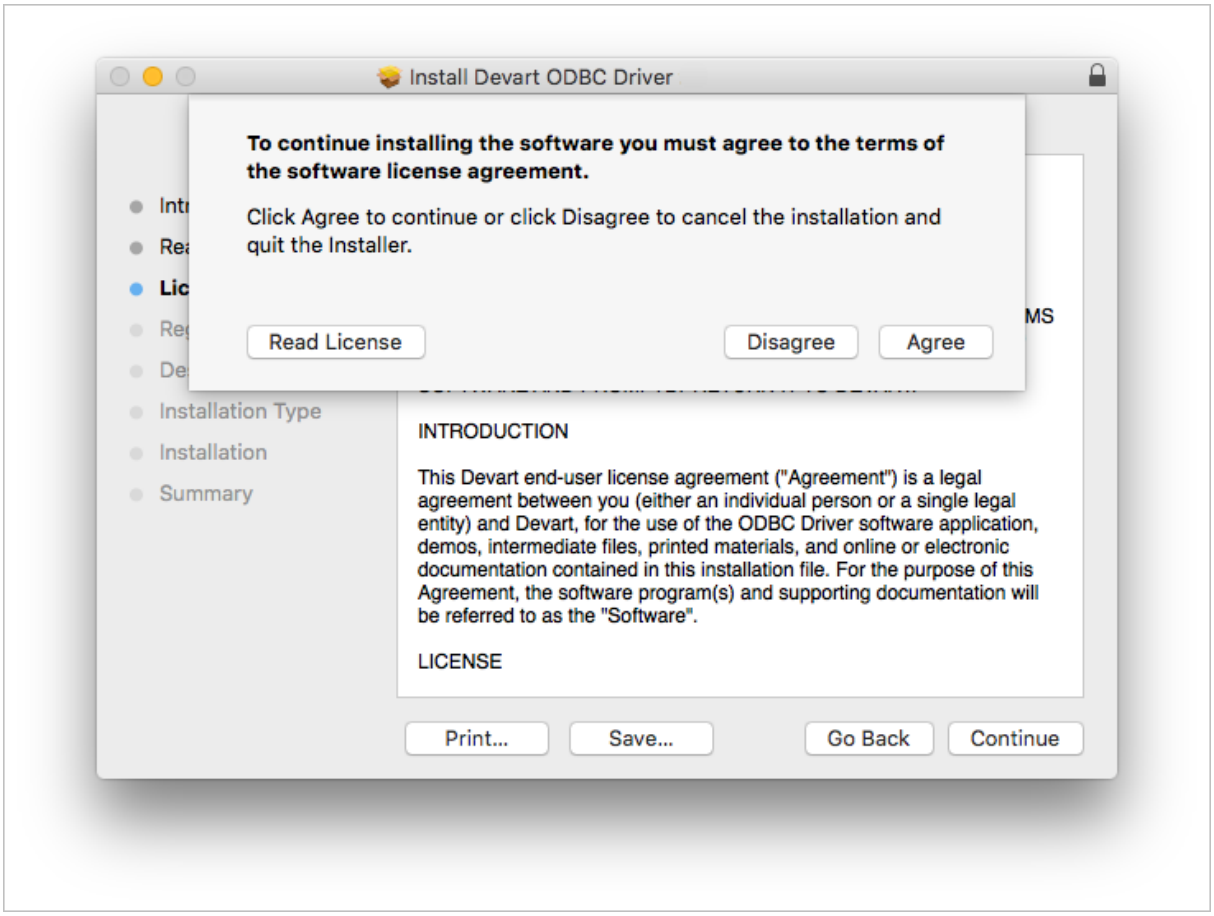
*Note: If the options in **Allow apps downloaded from** section are grayed out, click on the lock icon and enter your administrator password to proceed with the installation.*

3. Download the PKG file from the Devart website.

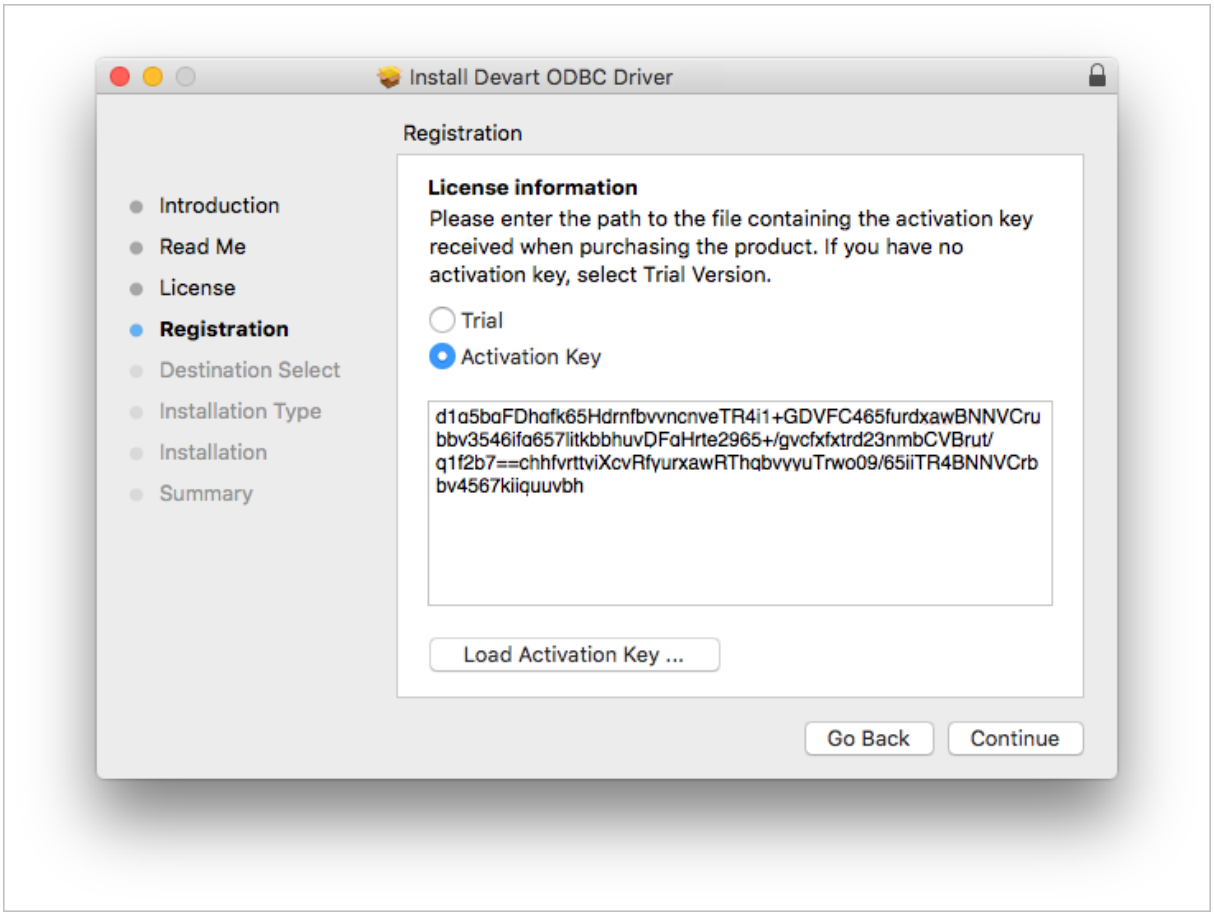
4. Run the downloaded file, press the Allow button to proceed with the installation.



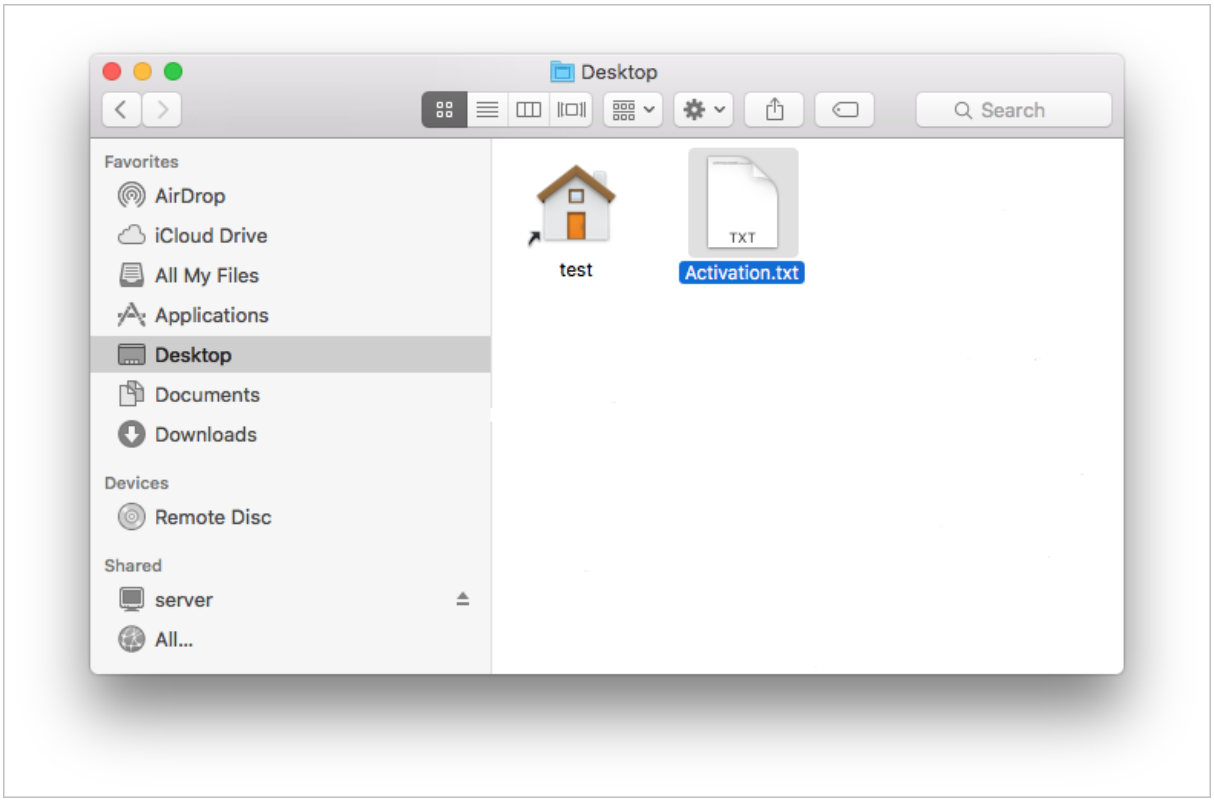
5. After reading the license agreement, click Agree.



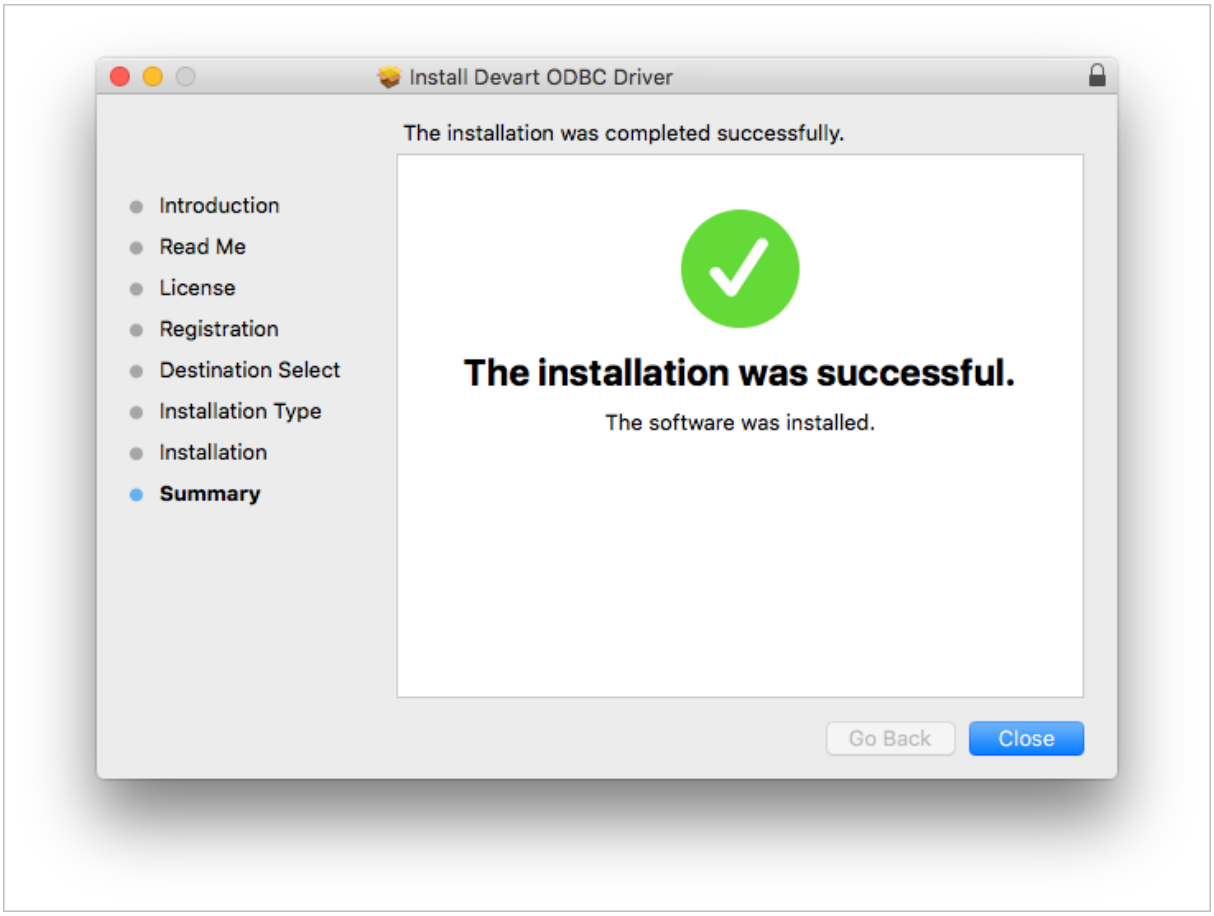
6. In the License Information dialog box, you should select the license type and activate the product. If you have no activation key, you can select Trial and use the driver for evaluation purposes.
7. If you have an activation key, select the Activation Key option. Copy the activation key from the registration email or your Customer Portal account and paste it into the Activation Key edit box.



8. If you have the activation key file, click the Load Activation Key button and browse to it.



9. To complete the installation click Continue, then Install buttons.



To activate the driver, perform the steps described in the Product Activation article.

See also:

- Installation on Windows
- Install Linux DEB package
- Install Linux RPM package

3.1.4 Linux DEB

Prerequisites

ODBC Driver for Salesforce works under control of an ODBC driver manager. ODBC driver manager is not distributed along with our driver and must be installed separately.

ODBC Driver for Salesforce is compatible with UnixODBC driver manager. You can install the unixODBC driver manager using the command below:

```
sudo apt-get install odbcinst1debian2 libodbc1 odbcinst unixodbc
```

In case when using other ODBC driver managers, ODBC Driver for Salesforce will be installed, but it will require manual modification of configuration files of these managers.

For Ubuntu 22.04 LTS

Devart ODBC Driver for Salesforce requires **openssl-1.1** library pre-installed. If you do not have it installed, you need to install it **before** installing the ODBC Driver for ODBC Driver for Salesforce. You can install the libraries using the commands below.

Retreive the .deb library installation file:

```
wget http://nz2.archive.ubuntu.com/ubuntu/pool/main/o/openssl/libssl1.1_1.1.1f-1ubuntu2.16_amd64.deb
```

Install the previously fetched file:

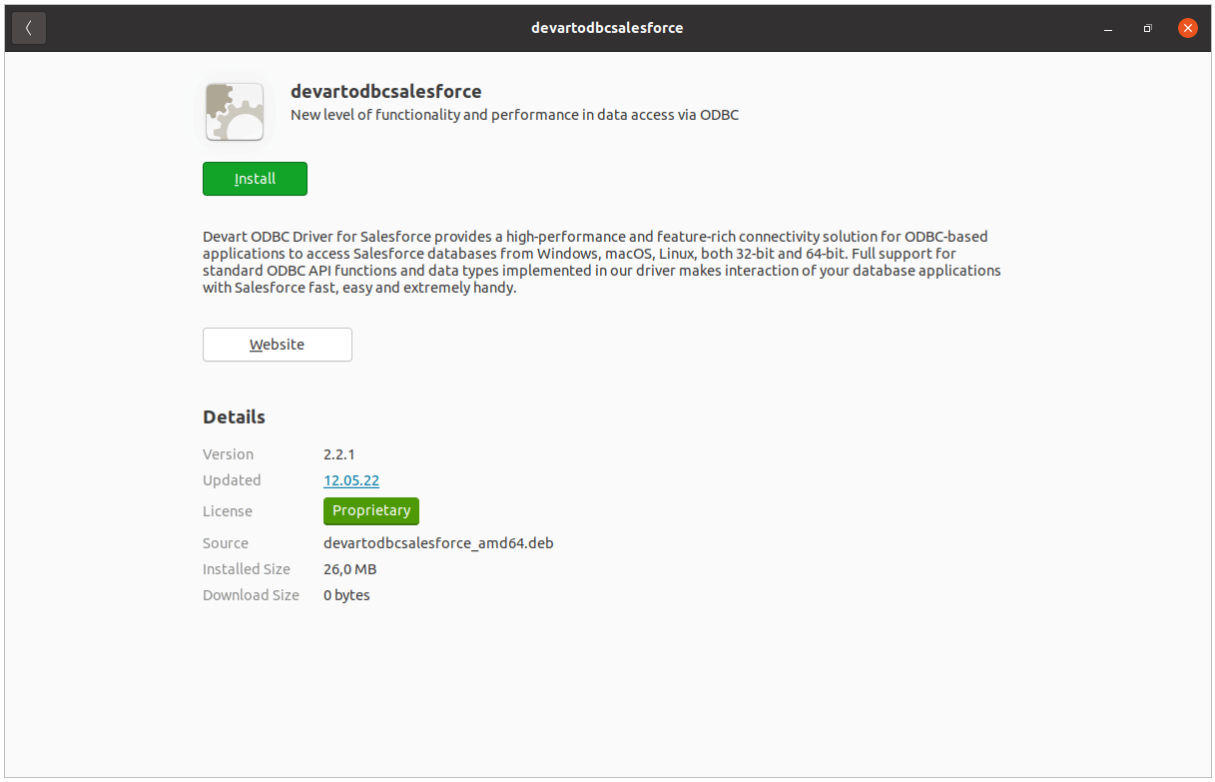
```
sudo dpkg -i libssl1.1_1.1.1f-1ubuntu2.16_amd64.deb
```

Installation

Let's consider how to install the Devart ODBC driver on Linux from a DEB package, for example, on Ubuntu. There are two ways to install the driver either manually or via the command line.

GUI installation

1. Download the DEB package of the required bitness from the Devart website.
2. Navigate to the folder with the downloaded package ("Downloads" by default) and double-click it.
3. In the opened dialog, click the **Install** button.



4. If the installation is successfully completed, the Install button changes into the Remove one.

Command-line installation

1. Download the DEB package from the Devart website.

By default the required package will be downloaded into the ~/Downloads folder (or the selected one);

2. Run the 'Terminal' program;

3. Navigate to the folder with the downloaded package cd ~/Downloads (if you downloaded the package into another folder, you need to specify the path to this folder as the cd command parameter):

```
cd ~/Downloads/
```

```
ubuntu@ubuntu-VirtualBox:~$ cd ~/Downloads/
ubuntu@ubuntu-VirtualBox:~/Downloads$
```

4. To install the devartodbcsalesforce_amd64.deb on a 64-bit system, use the following command:

```
sudo dpkg -i devartodbcsalesforce_amd64.deb
```

```
ubuntu@ubuntu-VirtualBox:~/Downloads$ cd ~/Downloads/
ubuntu@ubuntu-VirtualBox:~/Downloads$ sudo dpkg -i devartodbcsalesforce_amd64.d
eb
```

5. Driver is installed successfully.

```
ubuntu@ubuntu-VirtualBox:~$ cd ~/Downloads/
ubuntu@ubuntu-VirtualBox:~/Downloads$ sudo dpkg -i devartodbcsalesforce_amd64.d
eb
[sudo] password for ubuntu:
(Reading database ... 179250 files and directories currently installed.)
Preparing to unpack devartodbcsalesforce_amd64.deb ...
Unpacking devartodbcsalesforce (2.2.1) over (2.2.1) ...
Setting up devartodbcsalesforce (2.2.1) ...
ubuntu@ubuntu-VirtualBox:~/Downloads$
```

To activate the driver, perform the steps described in the Product Activation article.

See also:

- Install Linux RPM package
- Installation on Windows
- Installation on macOS

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3.1.5 Linux RPM

Prerequisites

ODBC Driver for Salesforce works under control of an ODBC driver manager. ODBC driver manager is not distributed along with our driver and must be installed separately.

ODBC Driver for Salesforce is compatible with UnixODBC driver manager.

In case when using other ODBC driver managers, ODBC Driver for Salesforce will be installed, but it will require manual modification of configuration files of these managers.

Installation

Let's consider how to install the Devart ODBC driver on Linux from an RPM package, for example, on CentOS. To install the driver, you should download the .rpm package and install it via the command line. See the detailed description of these steps below:

1. Download the RPM package from the Devart website.

By default the required package will be downloaded into the ~/Downloads folder (or the selected one);

2. Run the 'Konsole' program;

3. Navigate to the folder with the downloaded package cd ~/Downloads (if you downloaded the package into another folder, you need to specify the path to this folder as the cd command parameter):

```
cd ~/Downloads/
```

```
[test@localhost ~]$ cd ~/Downloads/
[test@localhost Downloads]$
```

4. To install the devart-odbc-salesforce.x86_64.rpm on a 64-bit system, use the following command::

```
sudo rpm -ivh devart-odbc-salesforce.x86_64.rpm
```

```
[test@localhost Downloads]$ sudo rpm -ivh devart-odbc-salesforce.x86_64.rpm
```

5. Driver is installed successfully.

To activate the driver, perform the steps described in the Product Activation article.

See also:

- Install Linux DEB package
- Installation on Windows
- Installation on macOS

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3.2 Product Activation

- Obtaining Activation Key
- Activation on Windows
- Where to see the license information

 Request Support ODBC Forum Provide Feedback

3.2.1 Obtaining Activation Key

To obtain a product activation key, follow these instructions:

1. After purchasing the license, you receive a registration email to the email address, specified when ordering the product.
2. This email contains a Driver Activation Key and Login Credentials for the Customer Portal. Keep this information secret.
3. You can copy the Activation Key either from the registration email or at the Customer Portal

account.

4. To login to the Customer Portal, use your Username and Password from the registration email.
5. To obtain your Activation Key, click the View link on the right. You will get the following dialog box:

6. Copy the Activation Key with the Copy to Clipboard button.

See also:

- Activation on Windows

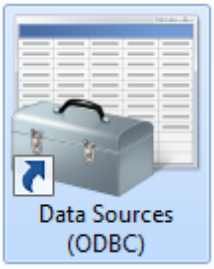
Request Support ODBC Forum Provide Feedback

3.2.2 Activation on Windows

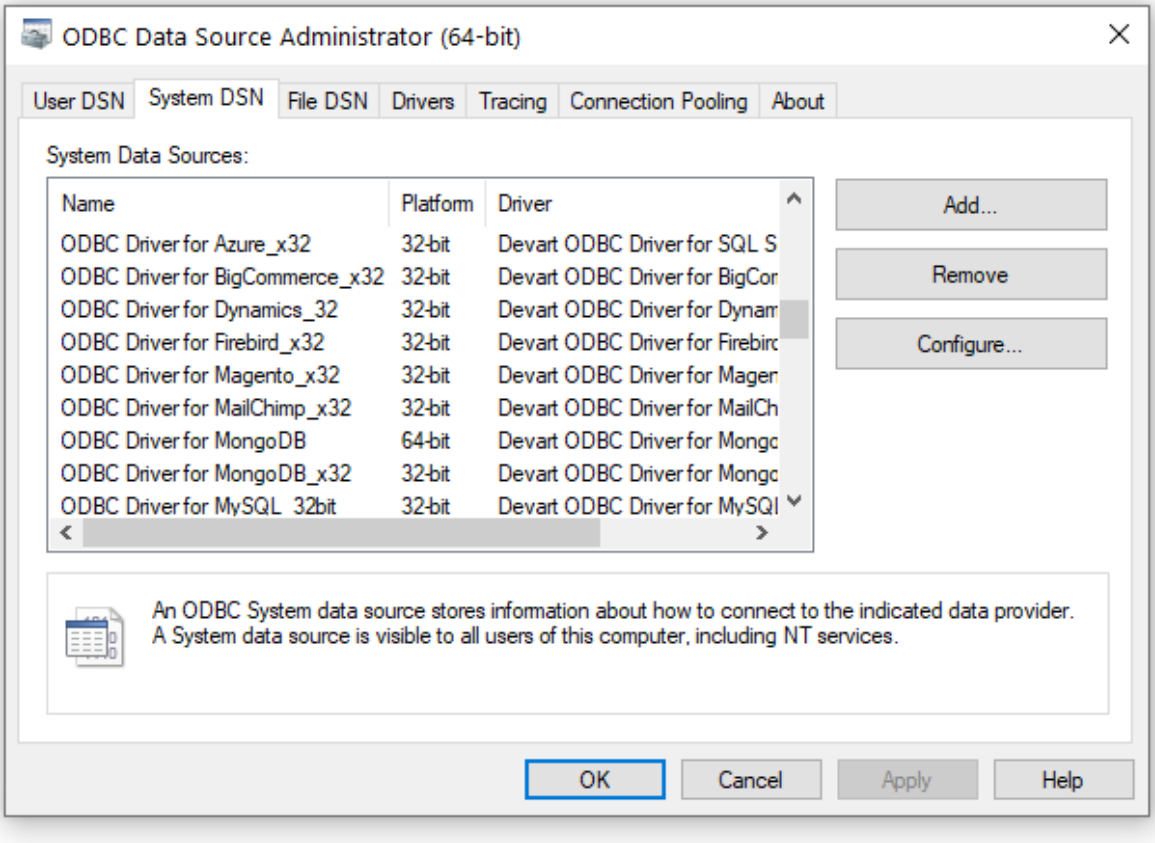
Driver Activation After Installation

To activate your installed driver using ODBC Administrator, perform the following steps:

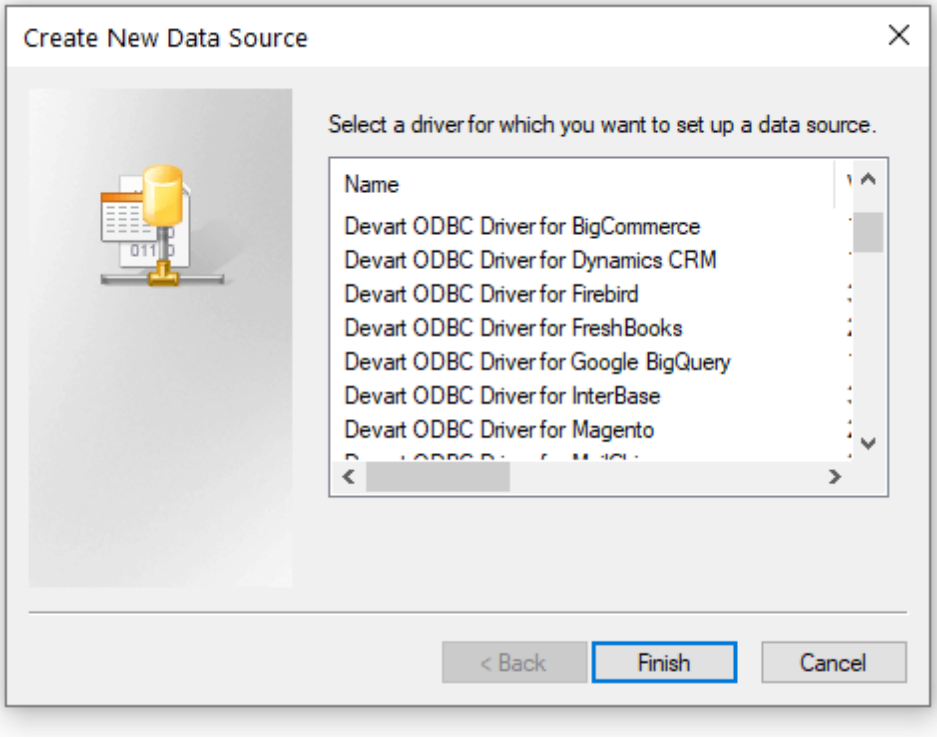
1. Run ODBC Administrator.



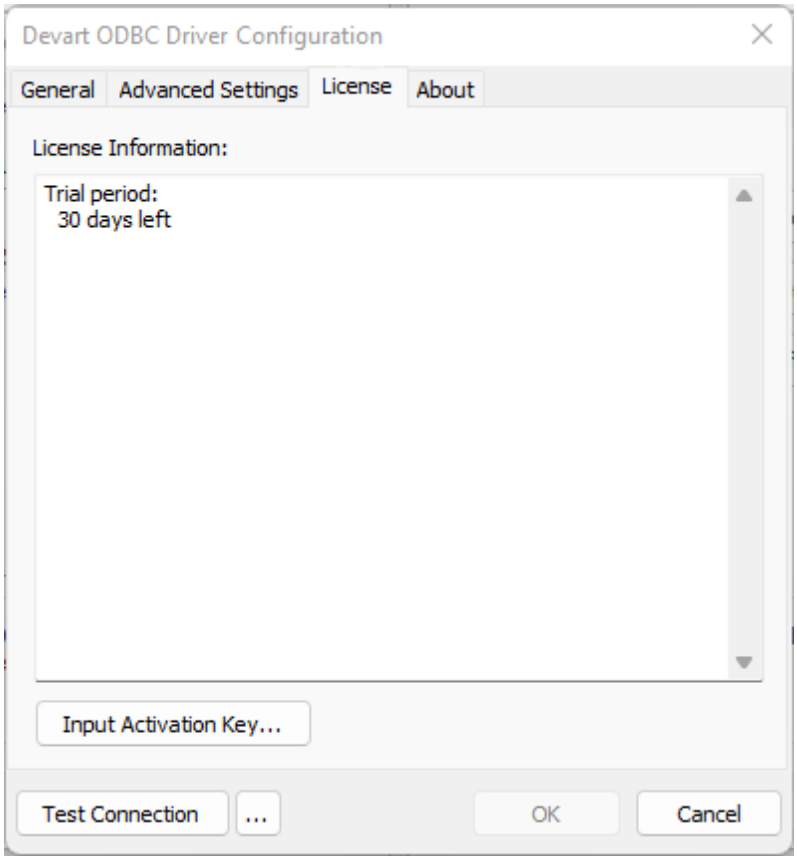
2. In the System DSN tab click the Add button.



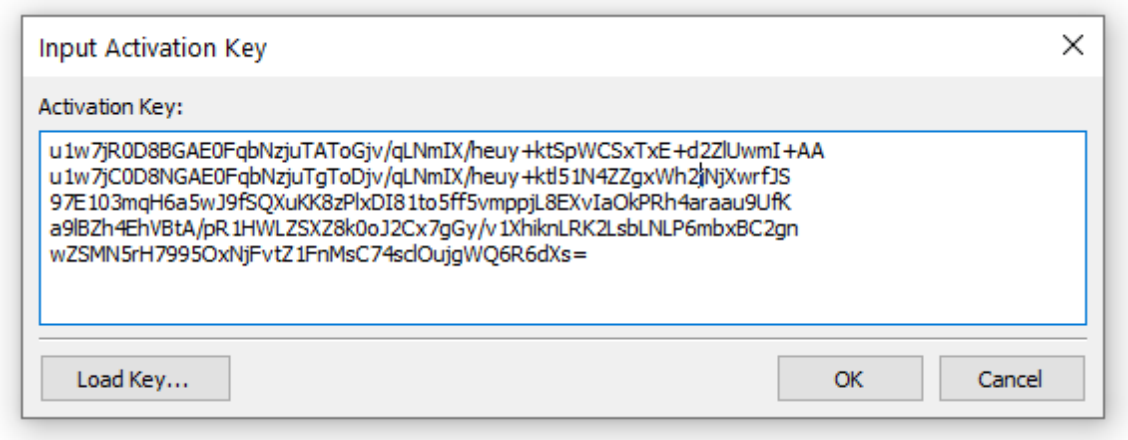
3. In the appeared dialog box, select the installed driver, click Finish.



4. In the Driver Configuration dialog box, on the License tab, click the Input Activation Key button.



5. Copy the activation key from the registration email carefully and paste it into the Input Activation Key edit box.



6. If you have the activation key file, click the Load Key button and browse to it.

7. Click OK.

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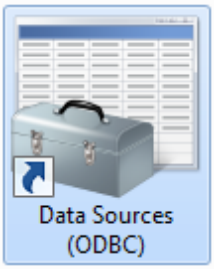
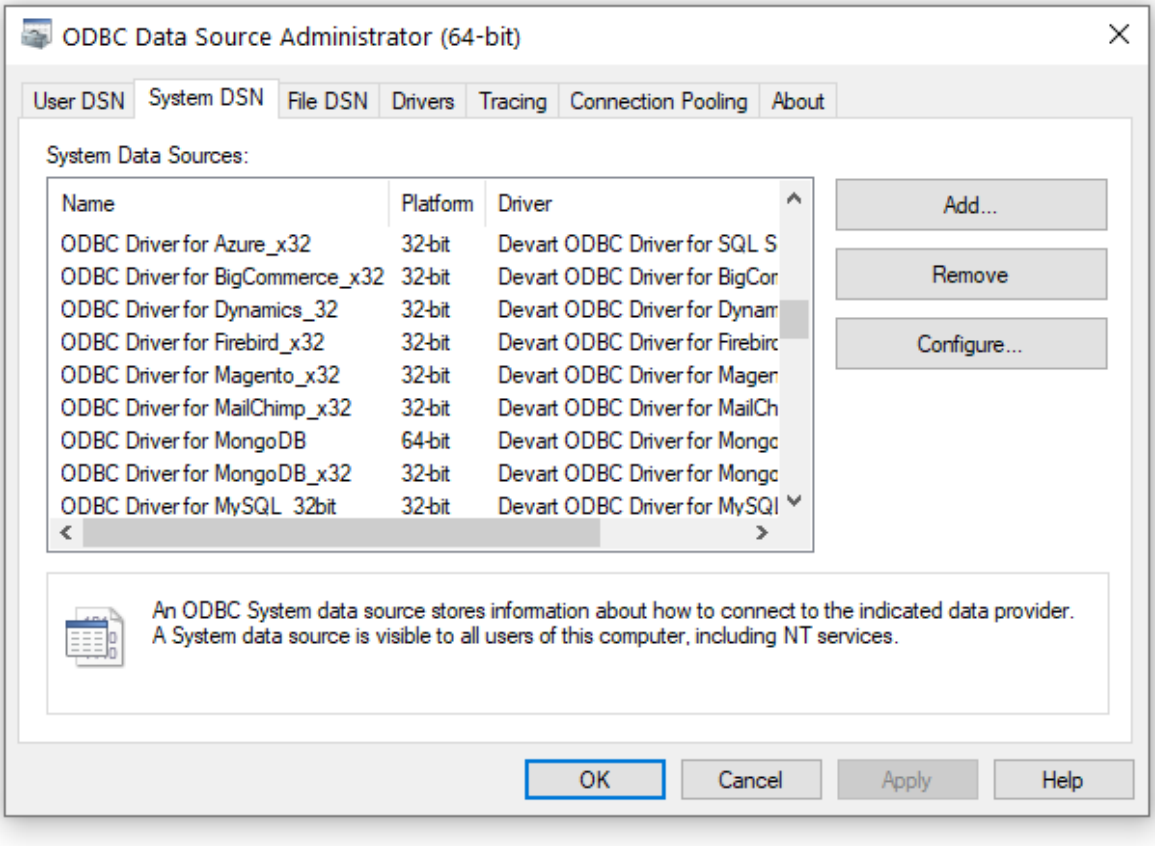
3.2.3 Where to See the License Information?

To see the license information of your installed driver, do the following:

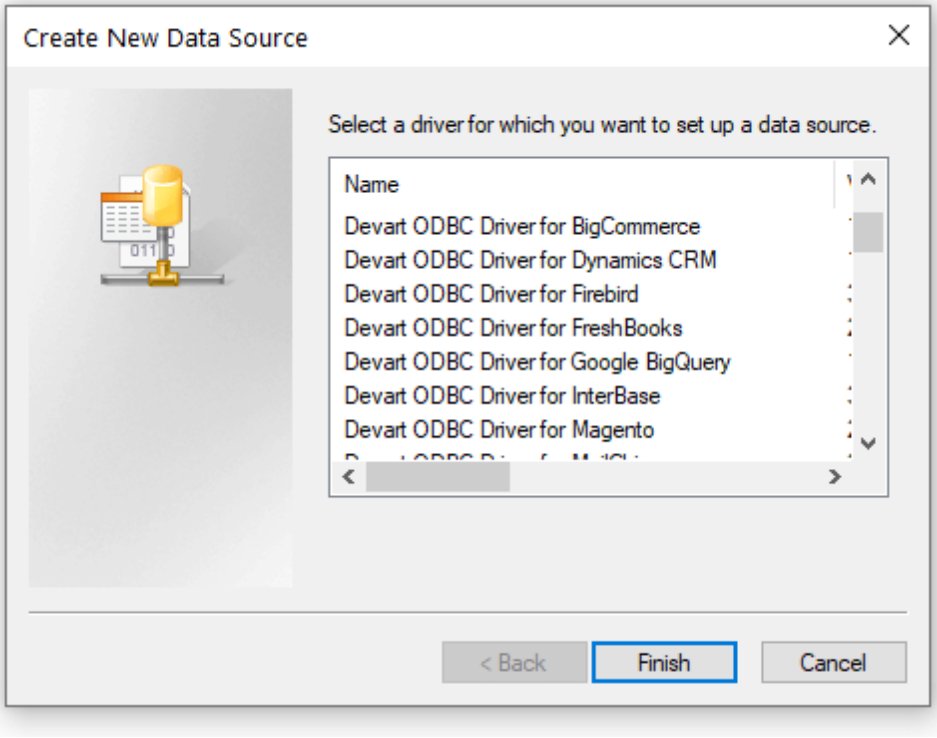
1. In the Control Panel run ODBC Administrator



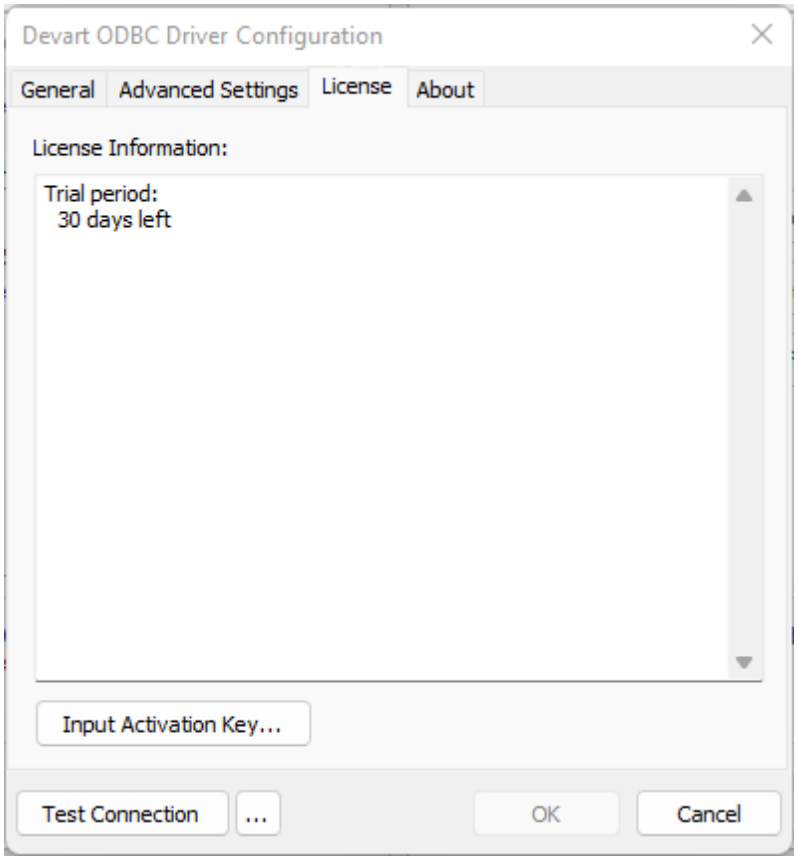
2. Open the System DSN tab and click the Add button



3. Select the driver and click Finish



4. In the appeared dialogue, select the License tab



See also

- Product Activation

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3.2.4 Activation on macOS

Driver Activation After Installation

If you don’t activate your driver during installation, you can activate it later by following the steps:

1. Create a file with the "activation.key" name.
2. Copy the activation key from the registration email or your Customer Portal account and paste it into the created file.

3. Place the "activation.key" file into the folder where the driver was installed (for Devart ODBC Driver for Salesforce it is /Library/ODBC/Devart/Salesforce by default).

See also:

- Activation on Windows
- Activation on Linux

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3.2.5 Activation on Linux

Driver Activation After Installation

If you did not activate the driver during installation, you can activate it later:

1. Create a file with the "activation.key" name.

2. Copy the activation key from the registration email or your Customer Portal account and paste it into the created file.

3. Place the "activation.key" file into the folder where the driver was installed:

- for the DEB package of Devart ODBC Driver for Salesforce, it is */usr/share/devart/odbcsalesforce* by default;

- for the RPM package of Devart ODBC Driver for Salesforce, it is */usr/local/devart/odbcsalesforce* by default.

See also:

- Activation on Windows
- Activation on macOS

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3.3 Connecting to Salesforce

See how to connect the Devart ODBC Driver for ODBC Driver for Salesforce:

- Windows DSN Configuration
- macOS DSN Configuration
- Linux DSN Configuration

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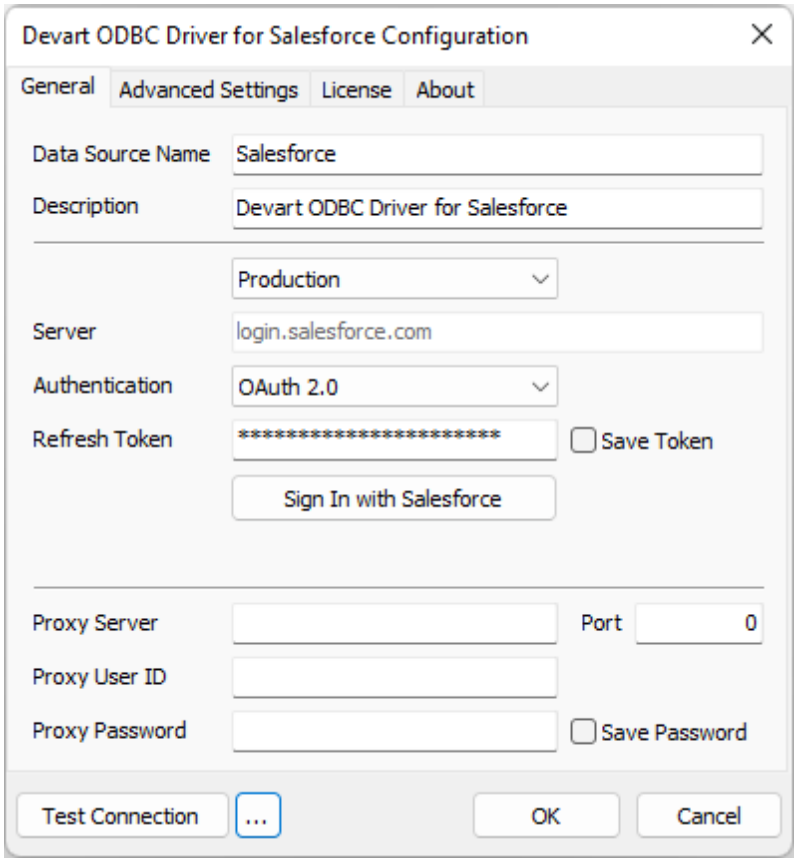
3.3.1 Windows

Windows DSN Configuration

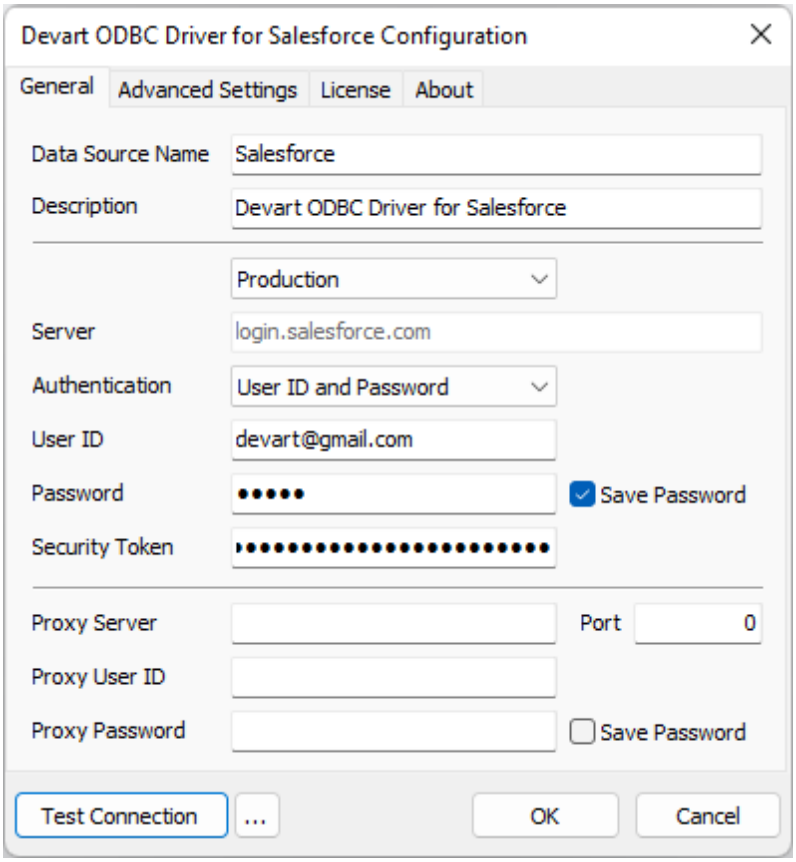
After installing the driver, create a DSN for Salesforce in the ODBC Data Source Administrator.

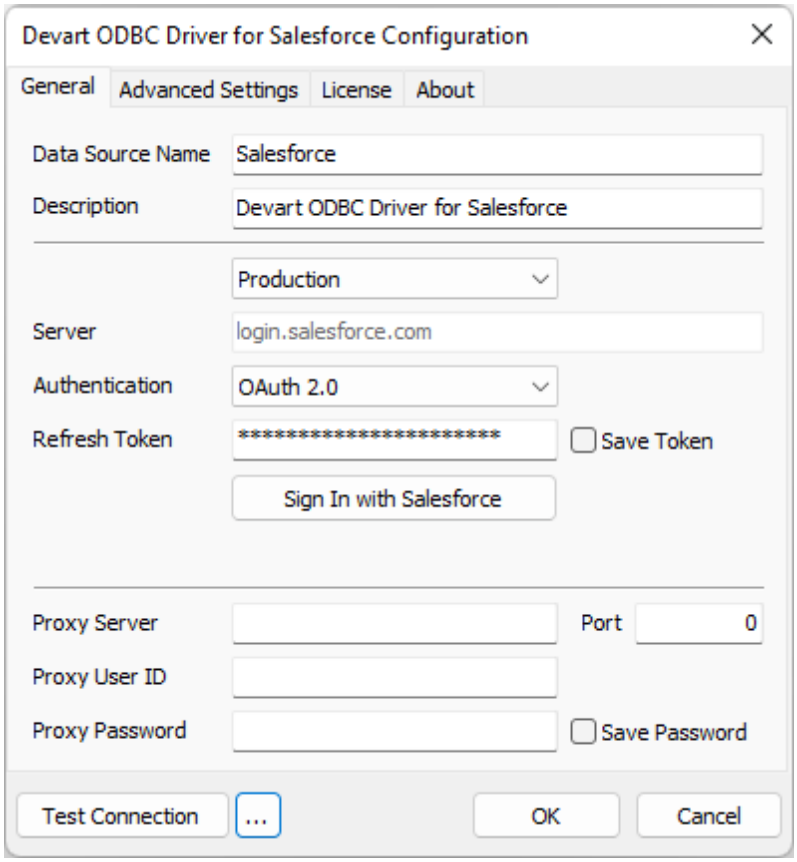
1. Open the ODBC Data Source Administrator.
   - Type `ODBC Data Sources` in the Windows search box and choose the application that matches the bitness of the third-party application (32-bit or 64-bit). You can also open **ODBC Data Sources** from **Control Panel** > **Administrative Tools**. Note that before Windows 8, the icon was named **Data Sources (ODBC)**.
   - Alternatively, you can run `C:\Windows\SysWOW64\odbcad32.exe` to create a 32-bit DSN or `C:\Windows\System32\odbcad32.exe` to create a 64-bit DSN.
2. Select the **User DSN** or **System DSN** tab. Most applications work with both types, yet some applications require a specific type of DSN.
3. Click **Add**. The **Create New Data Source** dialog will appear.
4. Select **Devart ODBC Driver for ODBC Driver for Salesforce** and click **Finish**. The driver setup dialog will open.
5. Enter the connection information in the appropriate fields.

By default, the authentication is set to OAuth 2.0.



You can also change authentication and connect to the data source with a user ID and password.


Devart ODBC Driver for Salesforce Configuration
General
Advanced Settings
License
About
Data Source Name
Salesforce
Description
Devart ODBC Driver for Salesforce
Production
Server
login.salesforce.com
Authentication
User ID and Password
User ID
devart@gmail.com
Password
Save Password
Security Token
Proxy Server
Port
0
Proxy User ID
Proxy Password
Save Password
Test Connection
...
OK
Cancel



6. You may test the connectivity by clicking **Test Connection**.

7. Click **OK** to save the DSN.

See Also

Connection Options

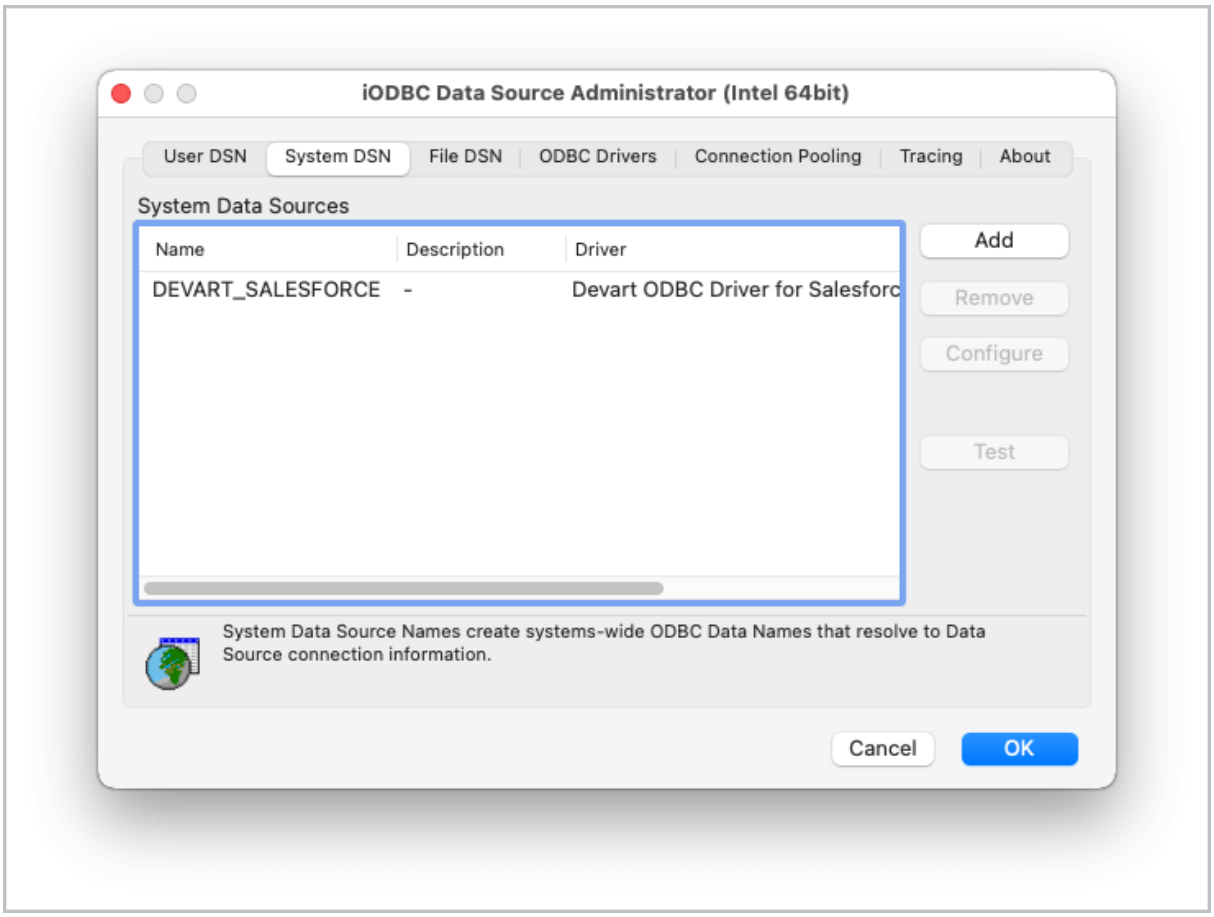
Request Support ODBC Forum Provide Feedback

3.3.2 Mac

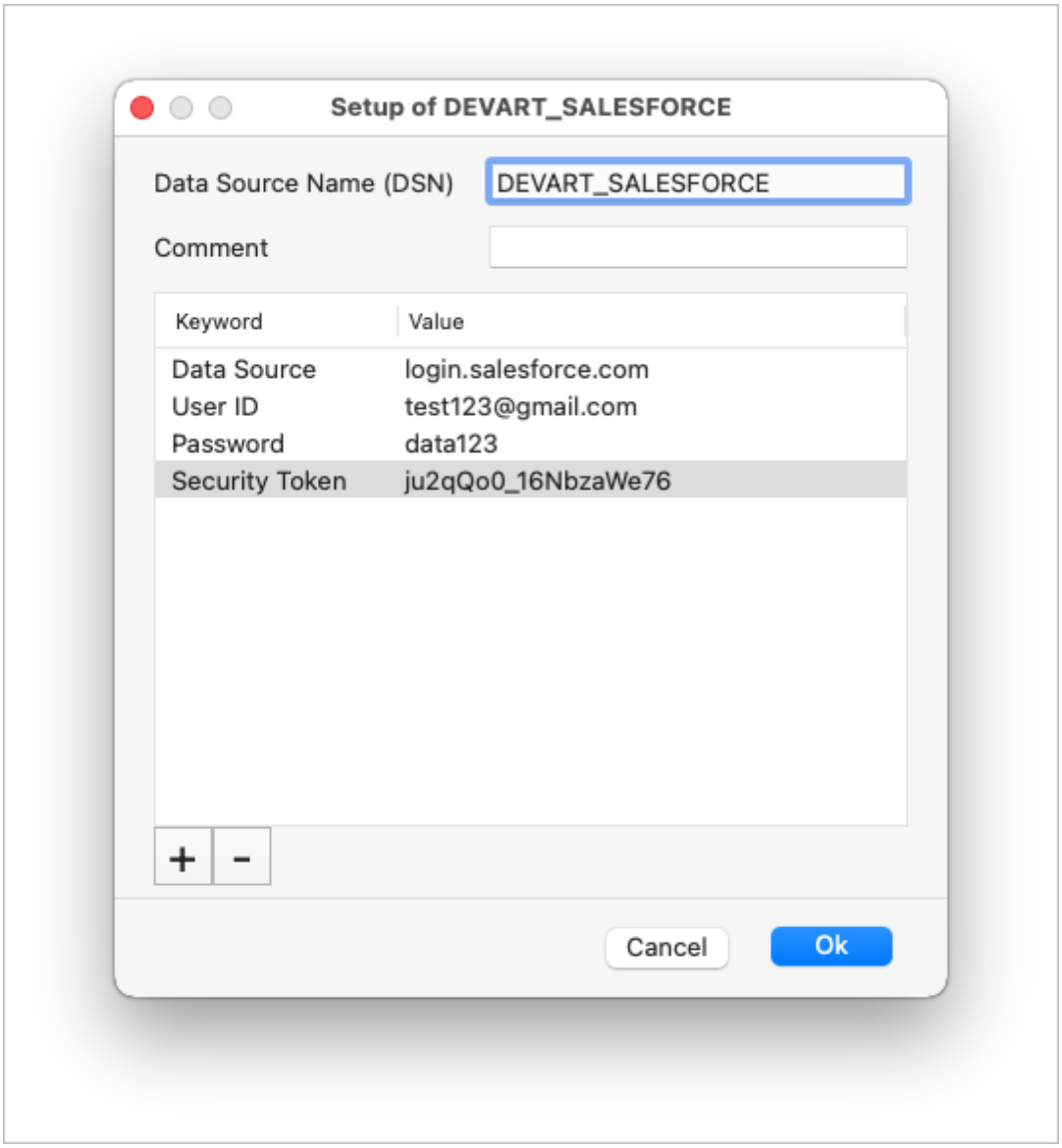
macOS DSN Configuration

After the driver is installed, DSN with the name DEVART_SALESFORCE is created. You can use it to test a connection with SALESFORCE server. For this, perform the following steps:

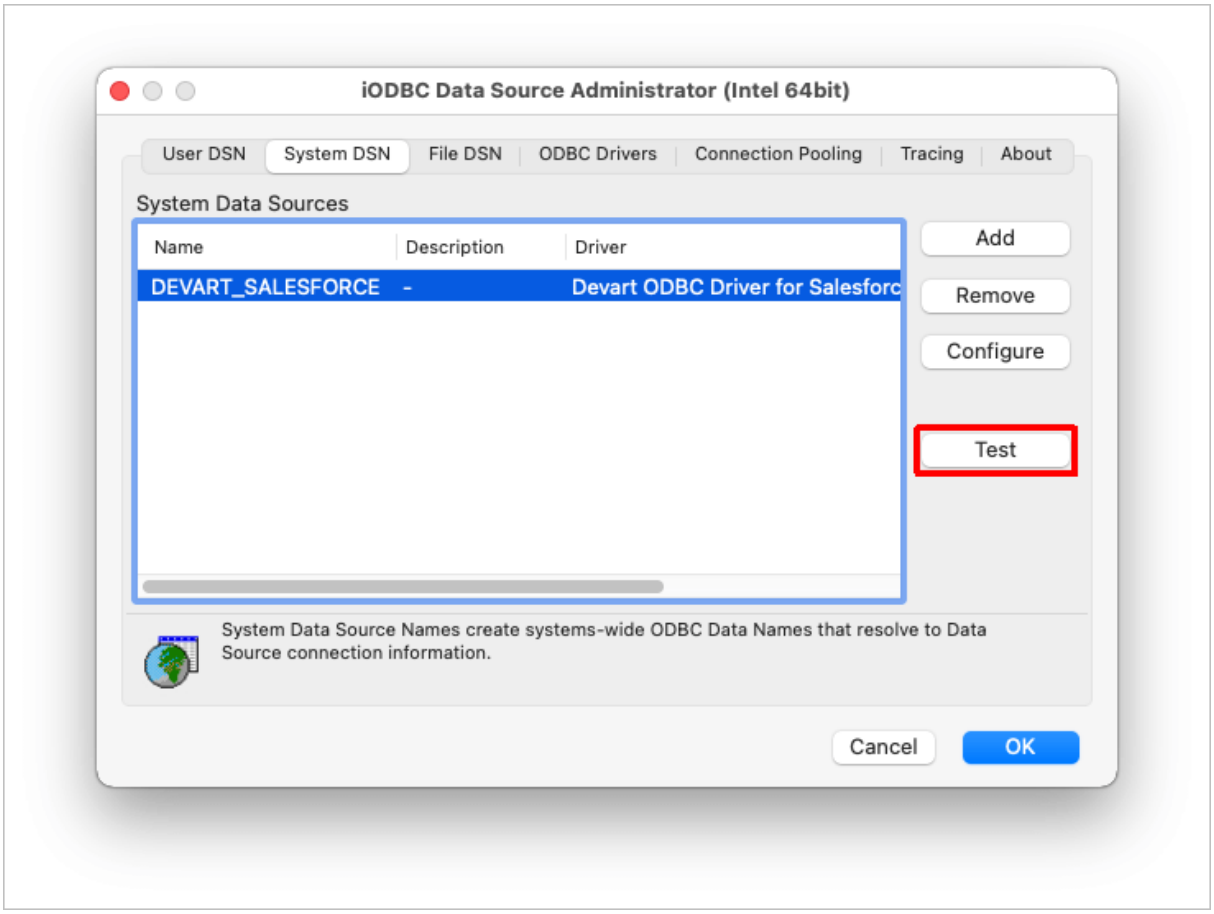
1. Run the iODBC utility of the required bitness. Find the DEVART_SALESFORCE section and click the Configure button:



2. In the appeared dialog, specify the required connection settings and click OK.



3. Now click the Test button to establish a test connection to your data source.



See Also

Connection Options

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3.3.3 Linux

Linux DSN Configuration

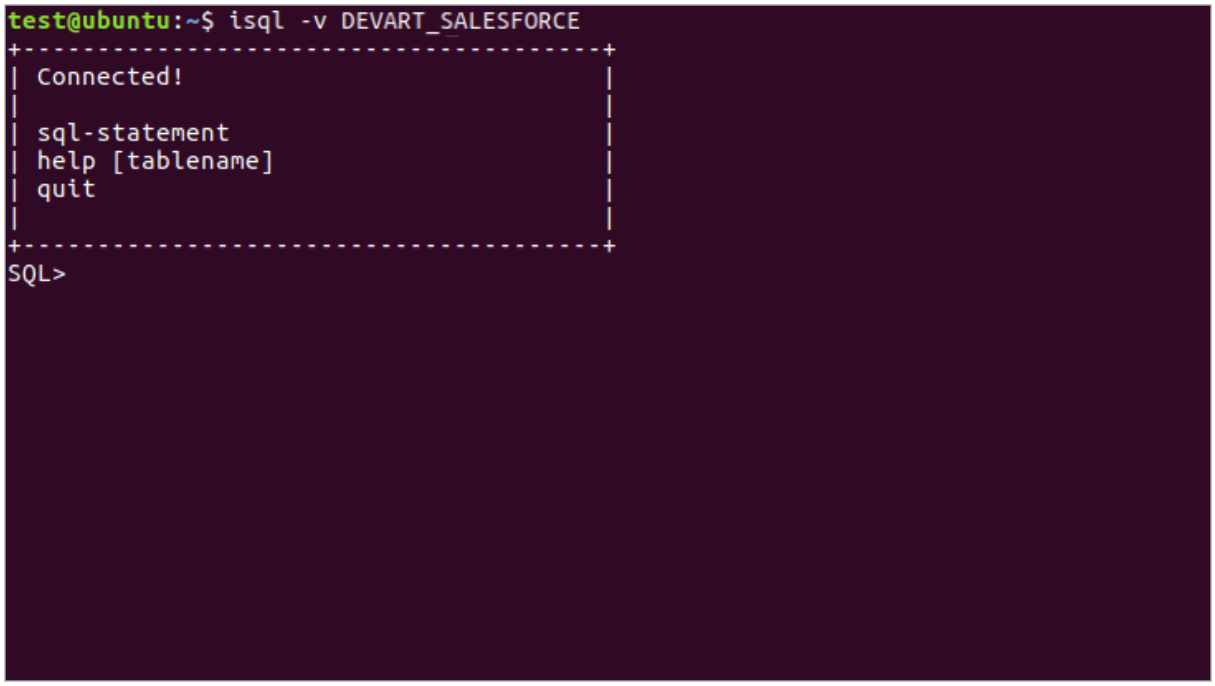
After the linux (DEB or RPM) driver is installed, a DSN with the name DEVART_SALESFORCE is created. You can use it to test the connection with the SALESFORCE server. For this, perform the following steps:

1. Open the odbc.ini file located in the /etc folder. Find the DEVART_SALESFORCE section and specify the required connection settings:

```
User ID=<your Salesforce User Name>
Password=<your Salesforce password>
Server=<your Salesforce server address>
Port=<your Salesforce Port>
Database=<your Salesforce database name>
```

2. Run the UnixODBC Test Command utility and test a connection using the following command:

```
isql -v DEVART_SALESFORCE
```



See Also

Connection Options

Request Support ODBC Forum Provide Feedback

3.4 Connection String Options

Salesforce ODBC Connection String Options

The following table lists the connection string options for Salesforce.

Option	Description

Authentication	The authentication type to use when connecting to Salesforce. Defaults to OAuth.
	`OAuth`
	The OAuth 2.0 authentication.
	`User ID and Password`
	The basic user/password authentication.

Server	The URL of the Salesforce server. Supported domains include `salesforce.com`, `force.com`, and `database.com`. Defaults to `login.salesforce.com`.
User ID	The Salesforce username. Available when the `User ID and Password` authentication type is selected.
Password	The Salesforce password. Available when the `User ID and Password` authentication type is selected.
Security Token	The security token used to authenticate access to your Salesforce account. Available when the `User ID and Password` authentication type is selected. To generate a token, login to Salesforce, click the User Menu in the top right corner, and select `My Personal Information` > `Reset My Security Token`.
Refresh Token	The Salesforce OAuth 2.0 token. Available when the `OAuth 2.0` authentication type is selected.

Proxy Settings

Option	Description
`Proxy Server`	The proxy hostname or IP address.
`Proxy Port`	The proxy port.
`Proxy User`	The proxy username.

Proxy Password	The proxy password.

Advanced Settings

Option	Description
Allow NULL strings	To retrieve metadata, not all parameters according to MSDN can accept a null value. If NULL, the driver should return an error. But some 3rd-party tools pass NULL to the parameters. These options should be enabled for compatibility with such tools.
Empty strings as NULL	
Connection Timeout	The time (in seconds) to wait for a connection to open before terminating an attempt. The default value is 60.
Include Deleted	Use the option to specify whether to include deleted records to the query results. The default value is False.
ODBC Behavior	Used to set the behavior corresponding to the ODBC specification version that a third-party tool expects. The behavior of ODBC driver can be changed by setting a value for the SQL_ATTR_ODBC_VERSION attribute by calling the SQLSetEnvAttr function. But some third-party tools expect the driver to exhibit ODBC 2.x behavior, but forget to call SQLSetEnvAttr with the specified version or pass an incorrect value there. In this case, the required behavior can be explicitly specified in the Connection String by setting the ODBC Behavior parameter. The possible values are: • Default - default ODBC behavior determined by a third-party tool. • Ver 2.x - ODBC 2.x behavior is explicitly set. • Ver 3.x - ODBC 3.x behavior is explicitly set.
RegionalNumberSettings	Enables the use of local regional settings when converting numbers to strings.

RegionalDateTimeSettings	Enables the use of local regional settings when converting dates and times to strings.
ReturnForeignKeys	Use the option to specify whether the driver must return foreign keys. Retrieving metadata about foreign key constraints is a time-consuming operation; many third-party tools request foreign key metadata even whey they do not actually need this information. Note that enabling the option may degrade performance of data access operations. The default value is False.
String Types	Sets the string value types returned by the driver as Default, Ansi or Unicode. • Default - the driver defines the string types. • Ansi - all string types will be returned as SQL_CHAR, SQL_VARCHAR and SQL_LONGVARCHAR. • Unicode - all string types will be returned as SQL_WCHAR, SQL_WVARCHAR and SQL_WLONGVARCHAR.
	The option value should be changed if any third-party tool supports only Ansi string types or Unicode ones.
QueryTimeout	The time to wait for a query execution result before terminating and generating an error.
UTC Dates	Specifies whether all the datetime values retrieved from the data source are returned as UTC values or converted to local time and whether the date values specified on the application side (e.g., in SQL statements) are considered UTC or local. The default value is false.

Salesforce ODBC Connection String sample

```
DRIVER={Devart ODBC Driver for Salesforce};User
ID=Your_Username;Password=******;Security
```

```
Token=a6Lgob979LW4anxfbhtDgtukr
```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3.5 Using SOQL Queries

Using SOQL Queries with ODBC Driver

You can use the Salesforce Object Query Language (SOQL) with our ODBC driver to query Salesforce data. SOQL is an optimized version of SQL specifically designed for accessing the underlying Salesforce database. It doesn't support some of the SQL advanced features like wildcards and joins, but allows using filters along with the SELECT clause to return an optional set of data.

The main difference between SQL and SOQL is that the latter is intended exclusively for querying the Salesforce database rather than modifying data with INSERT or UPDATE statements. Also, traditional SQL is used for retrieving data from one or more tables, either related or not, whereas SOQL is used for retrieving data only from Salesforce related objects. The SELECT clause of a SOQL query doesn't allow the wildcard — you must mention all the fields to select. Additionally, you must prefix the query with `SOQL:` to make the ODBC driver aware that you want to use the SOQL syntax, as in the following query.

```
SOQL:SELECT Contact.FirstName, Contact.Account.Name FROM Contact
```

Querying Salesforce Relationships

As mentioned earlier, SOQL doesn't support the JOIN keyword — instead it uses the parent-to-child and child-to-parent relationships in Salesforce. Below are SQL and SOQL queries which are equivalent.

[SQL]

```
SELECT Contact.Name, Contact.Email, Account.Name
FROM Contact
LEFT JOIN Account ON (Contact.AccountId = Account.Id)
```

[SOQL]

```
SOQL:SELECT Name, Email, Account.Name FROM Contact
```

See Also

SOQL Reference

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3.6 Sandboxed Apps on macOS

Sandboxed Apps on macOS

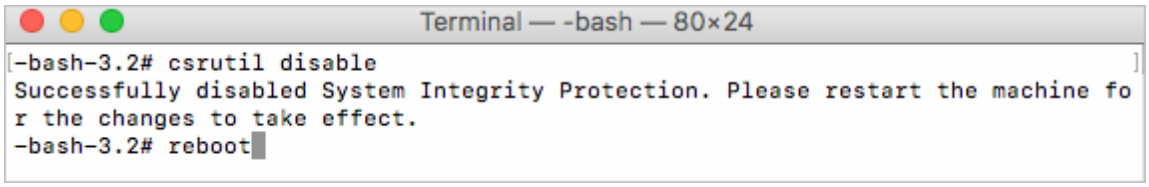
Sandboxed applications don't have permission to access iODBC Driver Manager on macOS. This is caused by the System Integrity Protection (SIP) technology on macOS which protects your files and folders from potentially malicious software by locking the application. When accessing a data source from an application like Excel through the ODBC driver for Salesforce, you may get an error message saying that the driver is unable to create a file.

Note that all third-party applications distributed through the Mac App Store are sandboxed.

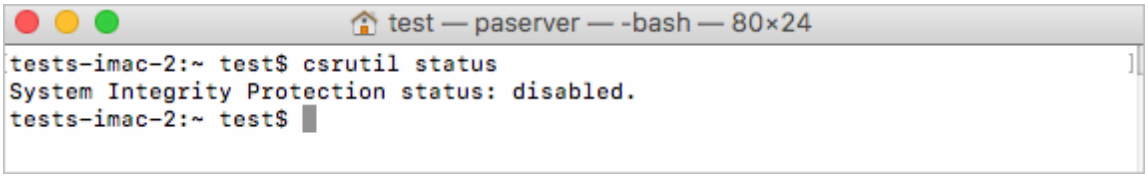
Disabling System Integration Protection (SIP) on macOS

To resolve the issue, you should turn off SIP on your computer:

1. Restart your computer in **Recovery mode** (hold down **Command + R** until you see the Apple logo).
2. Select **Utilities** > **Terminal**.
3. In the Terminal window, enter `csrutil disable`.



4. Restart your computer.
5. Enter `csrutil status` to check the status of SIP.



Enable SIP after you finish working with an ODBC data source. To turn on SIP, enter `csrutil enable` and restart your computer.

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3.7 Enabling ODBC Tracing

Creating an ODBC Trace Log on Windows

When you start or stop tracing in the 64-bit ODBC Administrator, the tracing is also enabled or disabled in the 32-bit ODBC Administrator, and vice versa.

If the ODBC client application you need to trace runs under Local System account or any other user login than your own, select `Machine-Wide tracing for all user identities`. For example, this option may be necessary for SSMS.

To generate a trace file using ODBC Source Administrator on Windows, follow the steps below.

1. Type `ODBC Data Sources` in the Windows 10 search box (in earlier versions of Windows, open `Control Panel` > `Administrative Tools`) and choose the application of the needed bitness.
2. Select the `Tracing` tab.
3. If necessary, change the default `Log File Path`. Make sure that the path is writable by the application, then click `Apply`.
4. Click `Start Tracing Now`.
5. Restart all application processes.
6. Click `Test Connection` in the DSN settings to make sure the driver is able to connect.
7. Reproduce the issue.

8. Click `Stop Tracing Now` on the `Tracing` tab.
9. Send us the obtained log file (for example, devart.log).

Creating an ODBC Trace Log on macOS

To enable the trace option on macOS, use the Tracing tab within ODBC Administrator.

1. Open the ODBC Administrator.
2. Select the `Tracing` tab.
3. If necessary, change the default `Log file path`.
4. Select `All the time` in the `When to trace` option.

Creating an ODBC Trace Log on Linux

To trace the ODBC calls on Linux, set the `Trace` and `TraceFile` keyword/value pairs in the `[ODBC]` section of the `/etc/odbcinst.ini` file, for example:

```
[ODBC]
Trace=Yes
TraceFile=/home/test/devart.log
```

Make sure to disable logging after obtaining a log file since it affects the read/write speed.

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3.8 Supported Data Types

Data Type Mapping

The Devart ODBC Driver for Salesforce supports all Salesforce data types.

The following table describes how the Salesforce data types are mapped to the ODBC data types.

Salesforce Data Types	ODBC Data Types
ANYTYPE	SQL_WVARCHAR
AUTONUMBER	SQL_WVARCHAR
BINARY	SQL_LONGVARBINARY

CHECKBOX	SQL_BIT
COMBOBOX	SQL_WVARCHAR
DATACATEGORYGROUPREFERENCE	SQL_VARCHAR
EMAIL	SQL_WVARCHAR
ENCRYPTEDTEXT	SQL_WVARCHAR
HTML	SQL_WLONGVARCHAR
ID	SQL_WVARCHAR
INT	SQL_INTEGER
LONGTEXTAREA	SQL_WLONGVARCHAR
MULTISELECTPICKLIST	SQL_WVARCHAR
NUMBER	SQL_DOUBLE
PHONE	SQL_WVARCHAR
PICKLIST	SQL_WVARCHAR
REFERENCE	SQL_WVARCHAR
TEXTAREA	SQL_WVARCHAR
TIME	SQL_TYPE_TIME
URL	SQL_WVARCHAR

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3.9 Supported ODBC API Functions

Supported ODBC Functions

The SQLGetInfo function returns information about the driver and data source. To find out whether a specific function is supported in the driver, call SQLGetFunctions.

For more information about the ODBC interface, see the ODBC Programmer's Reference.

ODBC Driver for Salesforce supports all deprecated functions for backward compatibility.

The following table lists the currently supported ODBC functions.

Function Name	Support	Standard	Purpose
SQLAllocHandle	✓	ISO 92	Obtains an environment, connection, statement, or descriptor handle.
SQLConnect	✓	ISO 92	Connects to a specific driver by data source name, user ID, and password.
SQLDriverConnect	✓	ODBC	Connects to a specific driver by connection string or requests that the Driver Manager and driver display connection dialog boxes for the user.
SQLAllocEnv	✓	Deprecated	Obtains an environment handle allocated from driver.
SQLAllocConnect	✓	Deprecated	Obtains a connection handle

ODBC API Calls for Obtaining Information about a Driver and Data Source

Function Name	Support	Standard	Purpose

SQLDataSources	✓	ISO 92	Returns the list of available data sources, handled by the Driver Manager
SQLDrivers	✓	ODBC	Returns the list of installed drivers and their attributes, handles by Driver Manager
SQLGetInfo	✓	ISO 92	Returns information about a specific driver and data source.
SQLGetFunctions	✓	ISO 92	Returns the functions supported by the driver.
SQLGetTypeInfo	✓	ISO 92	Returns information about supported data types.

ODBC API Calls for Setting and Retrieving Driver Attributes

Function Name	Support	Standard	Purpose
SQLSetConnectAttr	✓	ISO 92	Sets a connection attribute.
SQLGetConnectAttr	✓	ISO 92	Returns the value of a connection attribute.
SQLSetConnectOpti	✓	Deprecated	Sets a connection

on			option
SQLGetConnectOption	✓	Deprecated	Returns the value of a connection option
SQLSetEnvAttr	✓	ISO 92	Sets an environment attribute.
SQLGetEnvAttr	✓	ISO 92	Returns the value of an environment attribute.
SQLSetStmtAttr	✓	ISO 92	Sets a statement attribute.
SQLGetStmtAttr	✓	ISO 92	Returns the value of a statement attribute.
SQLSetStmtOption	✓	Deprecated	Sets a statement option
SQLGetStmtOption	✓	Deprecated	Returns the value of a statement option

ODBC API Calls for Preparing SQL Requests

Function Name	Support	Standard	Purpose
SQLAllocStmt	✓	Deprecated	Allocates a statement handle
SQLPrepare	✓	ISO 92	Prepares an SQL statement for later execution.
SQLBindParameter	✓	ODBC	Assigns storage for a parameter in an SQL statement.
SQLGetCursorName	✓	ISO 92	Returns the cursor name associated

			with a statement handle.
SQLSetCursorName	✓	ISO 92	Specifies a cursor name.
SQLSetScrollOptions	✓	ODBC	Sets options that control cursor behavior.

ODBC API Calls for Submitting Requests

Function Name	Support	Standard	Purpose
SQLExecute	✓	ISO 92	Executes a prepared statement.
SQLExecDirect	✓	ISO 92	Executes a statement
SQLNativeSql	✓	ODBC	Returns the text of an SQL statement as translated by the driver.
SQLDescribeParam	✓	ODBC	Returns the description for a specific parameter in a statement.
SQLNumParams	✓	ISO 92	Returns the number of parameters in a statement.
SQLParamData	✓	ISO 92	Used in conjunction with SQLPutData to supply parameter data at execution

			time. (Useful for long data values.)
SQLPutData	✓	ISO 92	Sends part or all of a data value for a parameter. (Useful for long data values.)

ODBC API Calls for Retrieving Results and Information about Results

Function Name	Support	Standard	Purpose
SQLRowCount	✓	ISO 92	Returns the number of rows affected by an insert, update, or delete request.
SQLNumResultCols	✓	ISO 92	Returns the number of columns in the result set.
SQLDescribeCol	✓	ISO 92	Describes a column in the result set.
SQLColAttribute	✓	ISO 92	Describes attributes of a column in the result set.
SQLColAttributes	✓	Deprecated	Describes attributes of a column in the result set.
SQLFetch	✓	ISO 92	Returns multiple result rows.
SQLFetchScroll	✓	ISO 92	Returns scrollable result rows.

SQLExtendedFetch	✓	Deprecated	Returns scrollable result rows.
SQLSetPos	✓	ODBC	Positions a cursor within a fetched block of data and enables an application to refresh data in the rowset or to update or delete data in the result set.
SQLBulkOperations	✓	ODBC	Performs bulk insertions and bulk bookmark operations, including update, delete, and fetch by bookmark.

ODBC API Calls for Retrieving Error or Diagnostic Information

Function Name	Support	Standard	Purpose
SQLError	✓	Deprecated	Returns additional error or status information
SQLGetDiagField	✓	ISO 92	Returns additional diagnostic information (a single field of the diagnostic data structure).

SQLGetDiagRec	✓	ISO 92	Returns additional diagnostic information (multiple fields of the diagnostic data structure).

ODBC API Calls for Obtaining Information About Database Objects (Catalog Functions)

Function Name	Support	Standard	Purpose
SQLColumnPrivileges	✓	ODBC	Returns a list of columns and associated privileges for one or more tables.
SQLColumns	✓	X/Open	Returns the list of column names in specified tables.
SQLForeignKeys	✓	ODBC	Returns a list of column names that make up foreign keys, if they exist for a specified table.
SQLPrimaryKeys	✓	ODBC	Returns the list of column names that make up the primary key for a table.
SQLProcedureColumns	✓	ODBC	Returns the list of input and output

			parameters, as well as the columns that constitute the result set for the specified procedures.
SQLProcedures	✓	ODBC	Returns the list of procedure names stored in a specific data source.
SQLSpecialColumns	✓	X/Open	Returns information about the optimal set of columns that uniquely identifies a row in a specified table, or the columns that are automatically updated when any value in the row is updated by a transaction.
SQLStatistics	✓	ISO 92	Returns statistics about a single table and the list of indexes associated with the table.
SQLTablePrivileges	✓	ODBC	Returns a list of tables and the privileges

			associated with each table.
SQLTables	✓	X/Open	Returns the list of table names stored in a specific data source.

ODBC API Calls for Performing Transactions

Function Name	Support	Standard	Purpose
SQLTransact	✓	Deprecated	Commits or rolls back a transaction
SQLEndTran	✓	ISO 92	Commits or rolls back a transaction.

ODBC API Calls for Terminating a Statement

Function Name	Support	Standard	Purpose
SQLFreeStmt	✓	ISO 92	Ends statement processing, discards pending results, and, optionally, frees all resources associated with the statement handle.
SQLCloseCursor	✓	ISO 92	Closes a cursor that has been opened on a statement handle.
SQLCancel	✓	ISO 92	Cancels an SQL statement.

ODBC API Calls for Terminating a Connection

Function Name	Support	Standard	Purpose
SQLDisconnect	✓	ISO 92	Closes the connection.
SQLFreeHandle	✓	ISO 92	Releases an environment, connection, statement, or descriptor handle.
SQLFreeConnect	✓	Deprecated	Releases connection handle.
SQLFreeEnv	✓	Deprecated	Releases an environment handle.

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4 Using in Third-Party Tools

This section discusses how to use ODBC Driver for Salesforce with ODBC-compliant tools.

- DBeaver
- DBxtra
- Oracle Database Link
- Microsoft Access
- Microsoft Excel
- OpenOffice and LibreOffice
- PHP
- Power BI
- Python

- QlikView
- SQL Server Management Studio
- SSIS
- Tableau

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4.1 Using in DBeaver

DBeaver Overview

DBeaver is a free, open source multiplatform database management tool and SQL client for developers and database administrators. DBeaver can be used to access any database or cloud application that has an ODBC or JDBC driver, such as Oracle, SQL Server, MySQl, Salesforce, or Mailchimp. Devart DBeaver provides you with the most important features you'd need when working with a database in a GUI tool, such as:

- SQL queries execution
- Metadata browsing and editing
- SQL scripts management
- Data export/import
- Data backup
- DDL generation
- ER diagrams rendering
- Test data generation
- BLOB/CLOB support
- Database objects browsing
- Scrollable resultsets

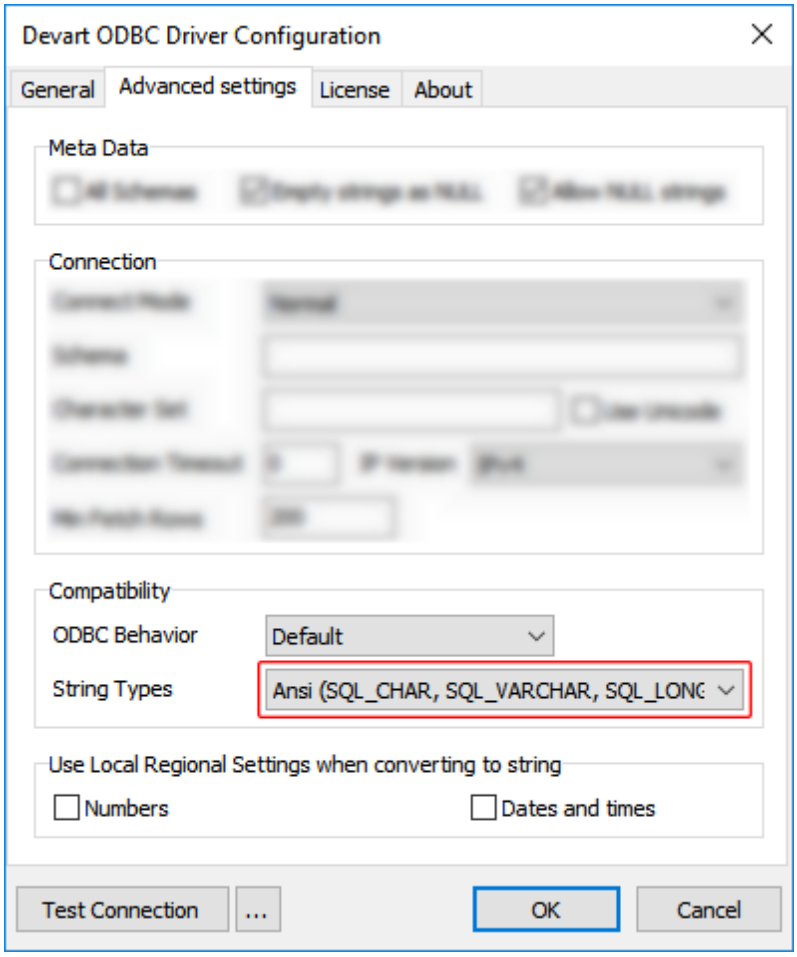
The tool comes in two editions — Community and Enterprise. Enterprise Edition supports NoSQL databases, such as MongoDB or Cassandra, persistent query manager database, SSH tunneling, vector graphics (SVG) and a few other enterprise-level features. Note though

that you can access a MongoDB database from DBeaver Community Edition using the respective Devart ODBC driver. For the purposes of this guide, we'll use the Community Edition of DBeaver to retrieve data from Salesforce via the Open Database Connectivity driver.

Creating an ODBC Data Source to Use Salesforce Data in DBeaver

1. Click the **Start** menu and select **Control Panel**.
2. Select **Administrative Tools**, then click **ODBC Data Sources**.
3. Click on the **System DSN** tab if you want to set up a DSN name for all users of the system or select **User DSN** to configure DSN only for your account.
4. Click the **Add** button and double-click Devart ODBC Driver for Salesforce in the list.
5. Give a name to your data source and set up the connection parameters.
6. Click the **Test Connection** button to verify that you have properly configured the DSN.

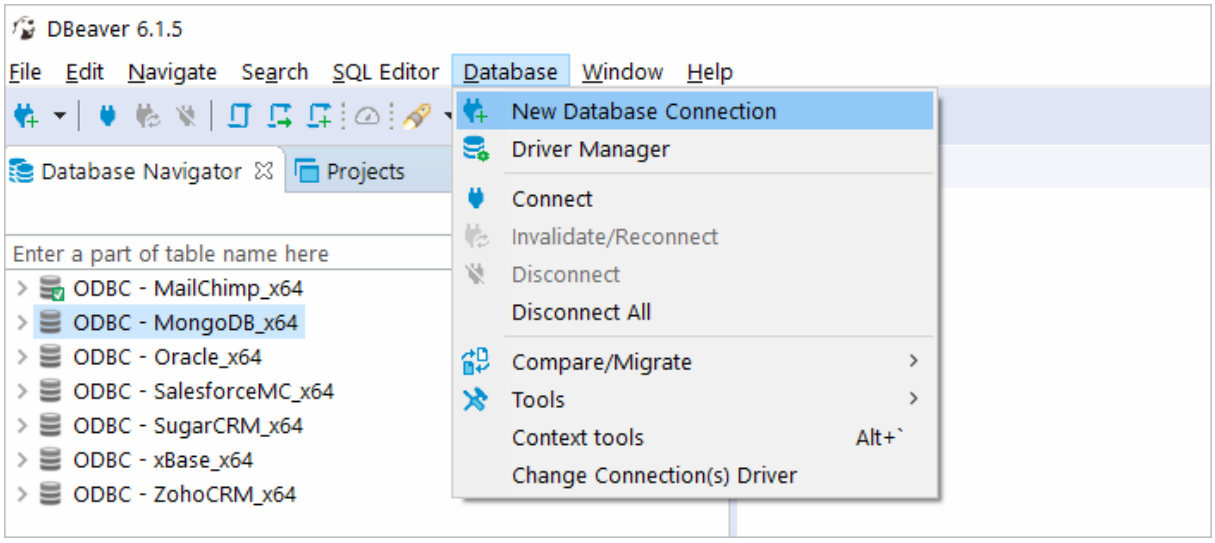
When using ODBC driver for Salesforce with DBeaver, SQL_WVARCHAR data types may be displayed incorrectly in DBeaver. To prevent this, you need to set the string data types to Ansi either in the **Advanced Settings** tab of the driver configuration dialog or directly in the connection string (String Types=Ansi) — all string types will be returned as SQL_CHAR, SQL_VARCHAR and SQL_LONGVARCHAR.



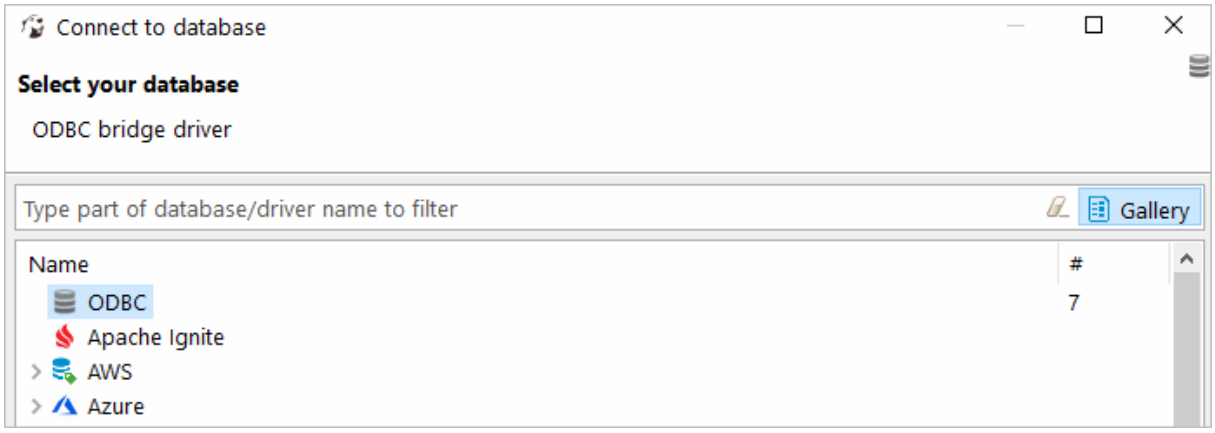
Connecting to Salesforce Data from DBeaver via ODBC Driver for Salesforce

Follow the steps below to establish a connection to Salesforce in DBeaver.

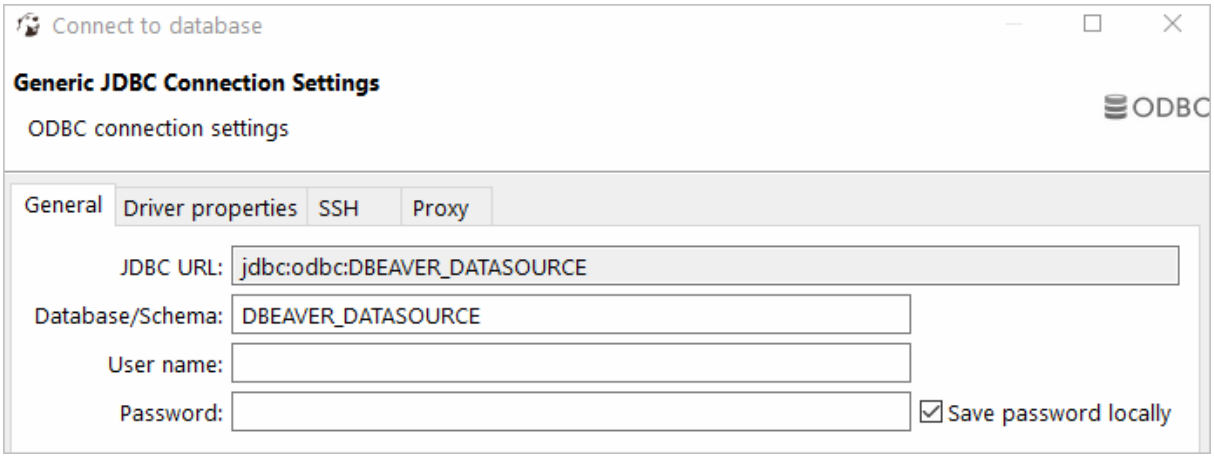
1. In the **Database** menu, select **New Database Connection.**



2. In the **Connect to database** wizard, select **ODBC** and click **Next**.



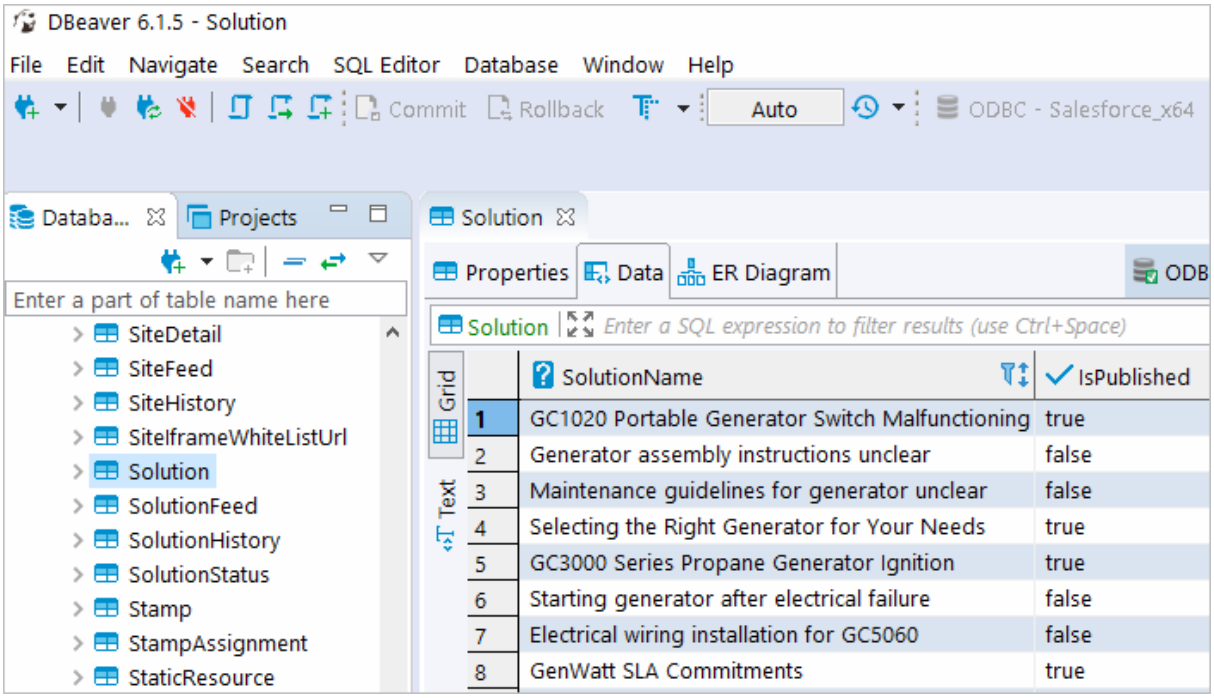
3. Enter the previously configured DSN in the **Database/Schema** field.



4. Click **Test Connection**. If everything goes well, you'll see the **Success** message.

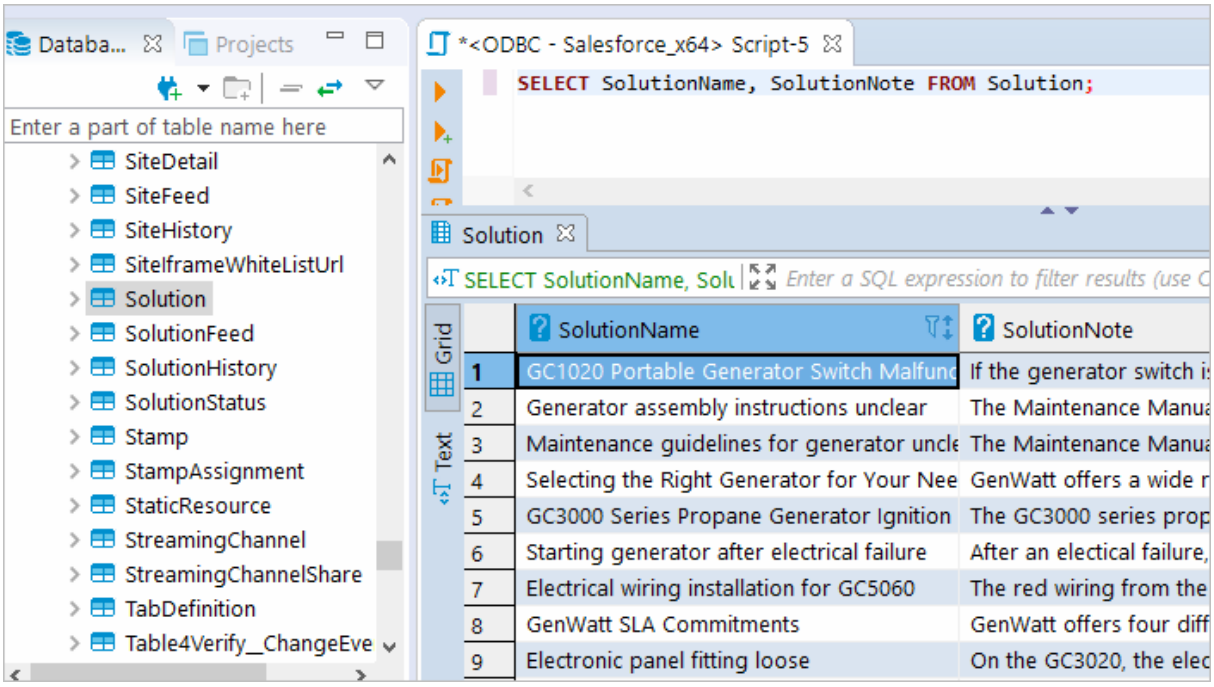
Viewing Salesforce Database Objects and Querying Data

You can expand out the database structure in DBeaver's **Database Navigator** to visualize all the tables in Salesforce database. To view and edit the data in a table, you need to right-click on the target table name and select **View data**.The content of the table will be displayed in the main workspace.



If you want to write a custom SQL query that will include only the necessary columns from the

table, you can select **New SQL Editor** in the **SQL Editor** main menu. Create your query and run it by clicking **Execute SQL Statement** to view the results in the same window.



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4.2 Using in Oracle DBLink

Configuring Oracle Database Gateway for ODBC

This article explains how to configure Oracle Database Gateway for ODBC. If your data is stored in a non-Oracle database system or cloud application, and you need to access it from an Oracle Database server, you can create a database link to an Oracle Database Gateway for ODBC. The gateway works with an ODBC driver to access non-Oracle systems or other, remote Oracle servers. Any ODBC-compatible data source can be accessed using the gateway and the appropriate ODBC driver. The driver must be installed on the same machine as the gateway. The non-Oracle system can run on the same machine as the Oracle server or on a different machine. The gateway can be installed on the machine running the non-Oracle system, the machine running the Oracle database or on a third machine as a standalone.

Configure the Initialization File

After installing the gateway and the ODBC driver for Salesforce, create an initialization file for your Oracle Database Gateway for ODBC. The sample file `initdg4odbc.ora` is stored in the `ORACLE_HOME\hs\admin` directory. To create an initialization file for the gateway, copy the sample initialization file and rename it. The name must be prefixed with init — for example, `initSalesforce.ora`. You need a separate initialization file for each ODBC data source. After creating the file, set the `HS_FDS_CONNECT_INFO` parameter to the system DSN that you created earlier, for example:

```
HS_FDS_CONNECT_INFO=Salesforce
```

Configure Oracle Net Listener

After configuring the gateway, you need to configure Oracle Net Listener to communicate with the Oracle database. Information about the gateway must be added to the `listener.ora` configuration file which is located in the `ORACLE_HOME\NETWORK\ADMIN\` directory. The following example is the address on which the Oracle Net Listener listens (`HOST` is the address of the machine on which the gateway is installed):

```
LISTENER =
    (DESCRIPTION_LIST =
        (DESCRIPTION =
          (ADDRESS = (PROTOCOL = TCP)(HOST = localhost)(PORT = 1521))
        )
    )
```

Add an entry to the `listener.ora` file to start the gateway in response to connection requests. The SID of the gateway (`SID_NAME`) must be the same in `listener.ora` and `tnsnames.ora`. `ORACLE_HOME` is the Oracle home directory where the gateway resides. To apply the new settings, stop and restart the Oracle Net Listener service.

```
SID_LIST_LISTENER=
   (SID_LIST=
      (SID_DESC=
         (SID_NAME=Salesforce)
         (ORACLE_HOME=D:\ORACLE_HOME)
         (PROGRAM=dg4odbc)
      )
   )
```

Configure Oracle for Gateway Access

Add a connect descriptor for the gateway to the `tnsnames.ora file`, which is located in `ORACLE_HOME\NETWORK\ADMIN` directory. The `SID` must match the value specified in the

`listener.ora` file.

```
Salesforce =
  (DESCRIPTION =
    (ADDRESS = (PROTOCOL = tcp)(HOST = localhost)(PORT = 1521))
    (CONNECT_DATA =
      (SID = Salesforce)
    )
    (HS = OK)
  )
```

Create Database Links

To access an ODBC data source, you must create a database link using a database tool like SQL Plus or dbForge Studio for Oracle: connect to your database server and execute the `CREATE DATABASE LINK` statement, as follows:

```
CREATE DATABASE LINK dblink CONNECT TO "username"  IDENTIFIED BY "password"
```

`dblink` is the complete database link name. `tns_name_entry` is the Oracle Net connect descriptor specified in the `tnsnames.ora` file.

When you create the database link in dbForge Studio for Oracle, you can see your newly created link in Database Links on the left panel. After creating the database link, you can run a query against the ODBC data source using the following syntax:

```
SELECT * FROM table_name@"dblink_name"
```

See also

Configuring Oracle Database Gateway for ODBC

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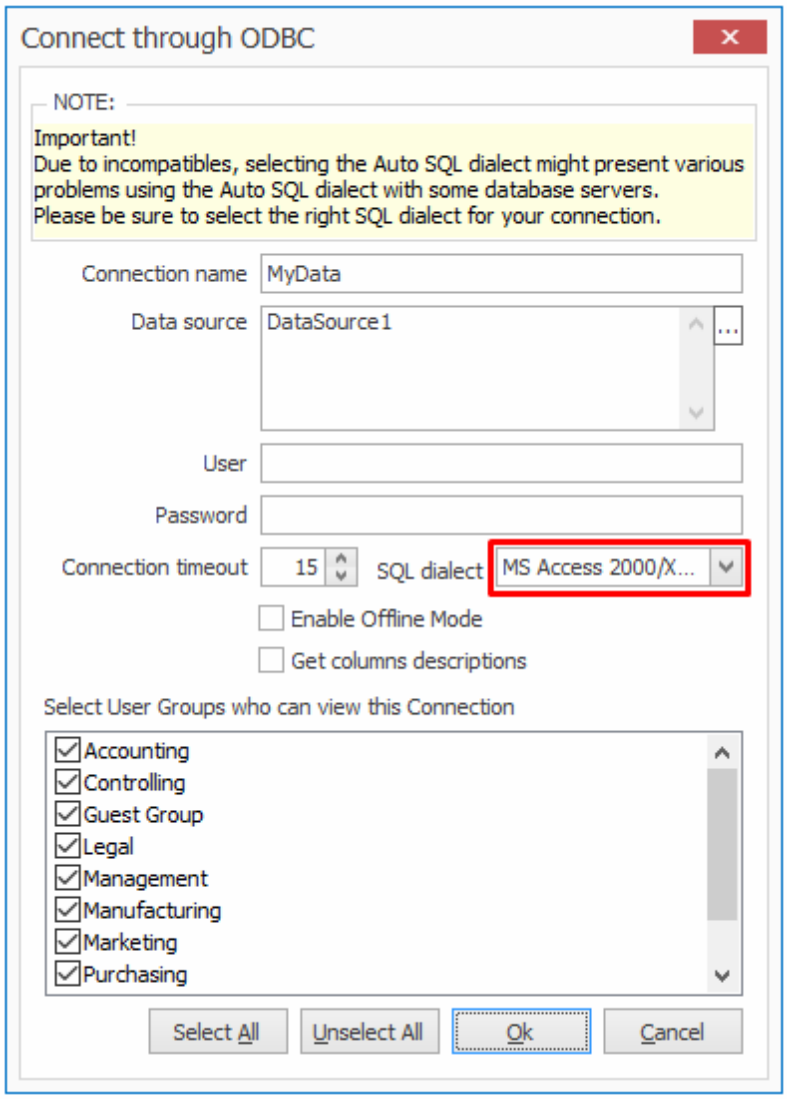
4.3 Using in DBxtra

Troubleshooting Salesforce ODBC Connection in DBxtra

This page explains how to troubleshoot your ODBC connection to Salesforce in DBxtra.

Due to incompatibilities between DBxtra and Salesforce, leaving the `SQL dialect` property to its default might present various issues. To resolve compatibility issues, set the property to `MS Access 2000/XP/2003` or `ANSI SQL/2003` for DBxtra version 11.0.1 or newer, and to `ANSI SQL/2003` for versions prior to 11.0.1.



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4.4 Using in Microsoft Access

Connecting Microsoft Access to Salesforce Using an ODBC Driver

This article explains how to connect Microsoft Access to Salesforce through the standard ODBC interface. Microsoft Access is a dababase management system that combines the relational database engine with a graphical user interface. Access can be used as a

substitution for spreadsheet applications like Excel to organize, store, and retrieve large amounts of related data that can be difficult to manage in spreadsheets.

In Microsoft Access, you can connect to your Salesforce data either by importing it or creating a table that links to the data. Devart ODBC drivers support all modern versions of Access. It is assumed that you have already installed and configured a DSN for ODBC driver for Salesforce. For the purpose of this article, we tested an ODBC connection to Salesforce through our ODBC drivers in Microsoft Access 2003, Microsoft Access 2007, Microsoft Access 2010, Microsoft Access 2013, Microsoft Access 2016, Microsoft Access 2019. The following steps describe how to use Microsoft Access 2019 to import or link to your data in Salesforce.

Importing Salesforce Data Into Microsoft Access Through an ODBC Connection

1. Open your Microsoft Access database.
2. Select the **External Data** tab in the ribbon.
3. Expand the **New Data Source** drop-down and select **From Other Sources**, then select **ODBC Dababase**.
4. In the **Get External Data - ODBC Database** dialog box, select **Import the source data into a new table in the curent database**, and click **OK**.
5. In the **Select Data Source** dialog box, select the **Machine Data Source** tab.
6. Select the DSN that you have configured for Salesforce and click **OK**.
7. In the **Import Objects** dialog box, select the tables that you want to import, and click **OK**.
8. If the database objects have been successfully imported, you should the see the corresponding message in the dialog box. If you want to save the import steps to quickly repeat the process without using the wizard at a later time, select the **Save import steps** checkbox. Click **Close**.
9. The imported tables should appear in the **Tables** navigation pane on the left.
10. Double-click on the needed table to display its contents.

Linking to Salesforce Data in Microsoft Access Through an ODBC Connection

1. Open your Microsoft Access database.

2. Select the **External Data** tab in the ribbon.
3. Expand the **New Data Source** drop-down and select **From Other Sources**, then select **ODBC Dababase**.
4. In the **Get External Data - ODBC Database** dialog box, select **Link to the data source by creating a linked table**.
5. In the **Select Data Source** dialog box, select the **Machine Data Source** tab.
6. Select the DSN that you have configured for Salesforce and click **OK**.
7. In the **Link Tables** dialog box, select the table or tables that you want to link to, and click **OK**.
8. The **Select Unique Record Identifier** dialog box will prompt you to choose a field or fields that uniquely identify each record in the table. To avoid inconsistencies, it is recommended to select the primary key in the Salesforce table as the unique record identifier. You are linking multiple tables, you will be prompted to select unique record identifiers for each of the selected tables.
9. The linked tables should appear in the **Tables** navigation pane on the left.
10. Double-click on the needed table to display its contents.

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4.5 Using in Microsoft Excel

Connecting to Salesforce from Microsoft Excel using ODBC Driver for Salesforce

You can use Microsoft Excel to access data from a Salesforce database using ODBC connector. With ODBC Driver, you can import the data directly into an Excel Spreadsheet and present it as a table. Make sure that you use matching Excel and ODBC Driver, e.g. if you have installed a 64-bit ODBC Drive, you will need to use the 64-bit version of Excel.

When working with Microsoft Excel, there are different ways of retrieving data from various data sources using our ODBC drivers.

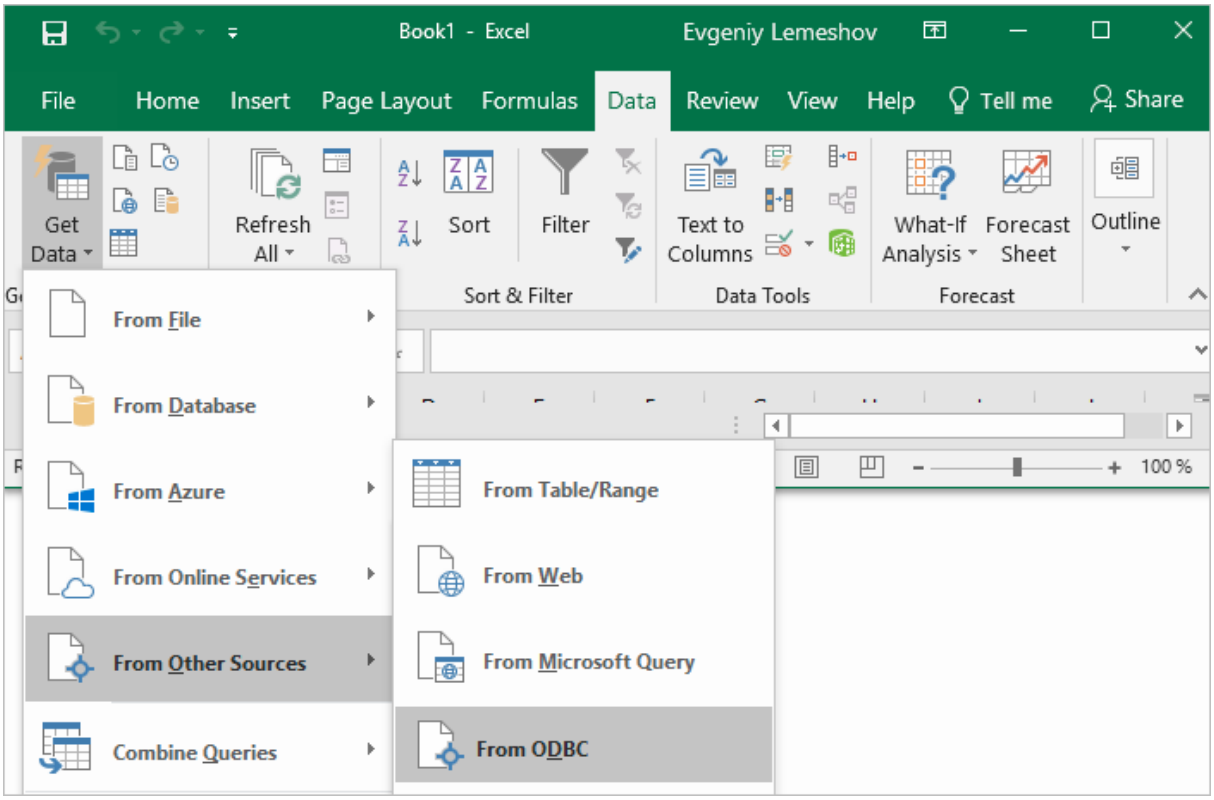
- Connecting Excel to Salesforce with Get & Transform (Power Query)

- Connecting Excel to Salesforce with Data Connection Wizard (Legacy Wizard)
- Connecting Excel to Salesforce with the Query Wizard
- Connecting Excel to Salesforce with Microsoft Query
- Connecting Excel to Salesforce with PowerPivot

Connecting Excel to Salesforce with Get & Transform (Power Query)

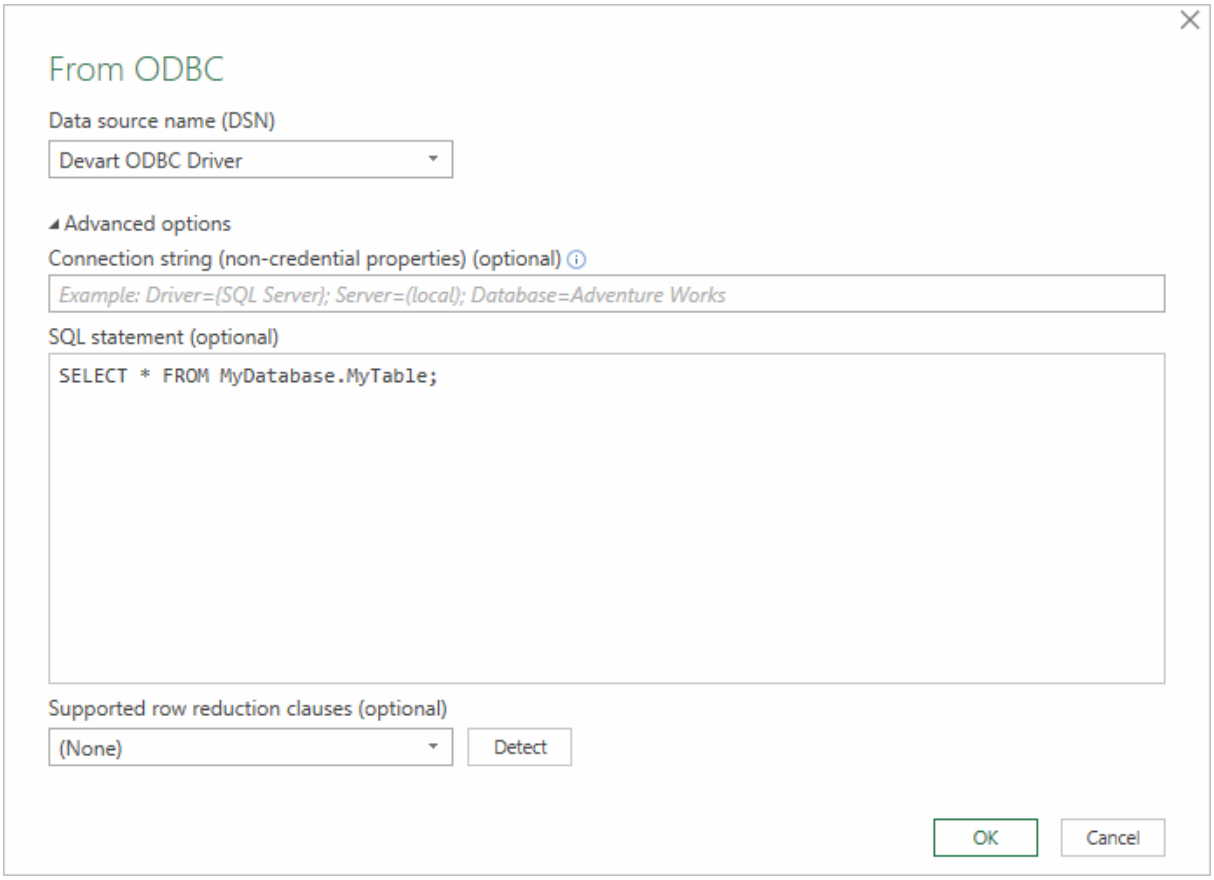
You can use Get & Transform (Power Query) to connect to Salesforce from Excel with ODBC. This method assumes that you've installed an ODBC driver for Salesforce.

1. Click the **Data** in Excel, then expand the **Get Data** drop-down list. Click **From Other Sources > From ODBC**.

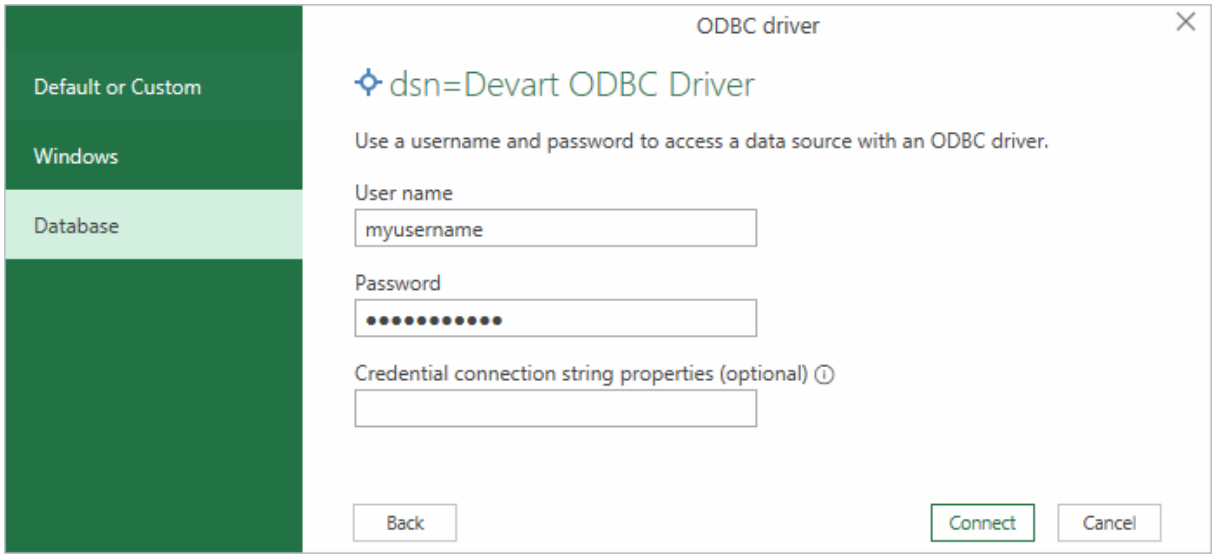


2. In the **From ODBC** dialog, choose your data source name (DSN). If you haven't configured your ODBC driver yet, you can expand the **Advanced Options** dialog box and enter the connection string for your data source (without credentials, which are defined in the

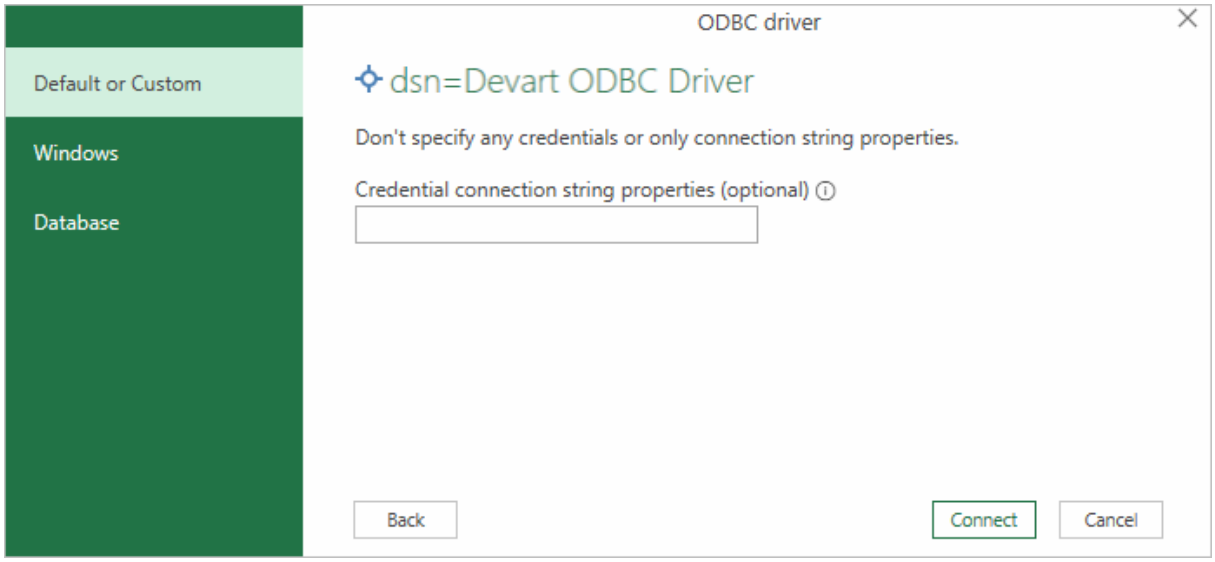
credentials dialog box in the next step). Additionally, you can enter an SQL statement that will be executed right after establishing a connection to the data source. Click **OK**.



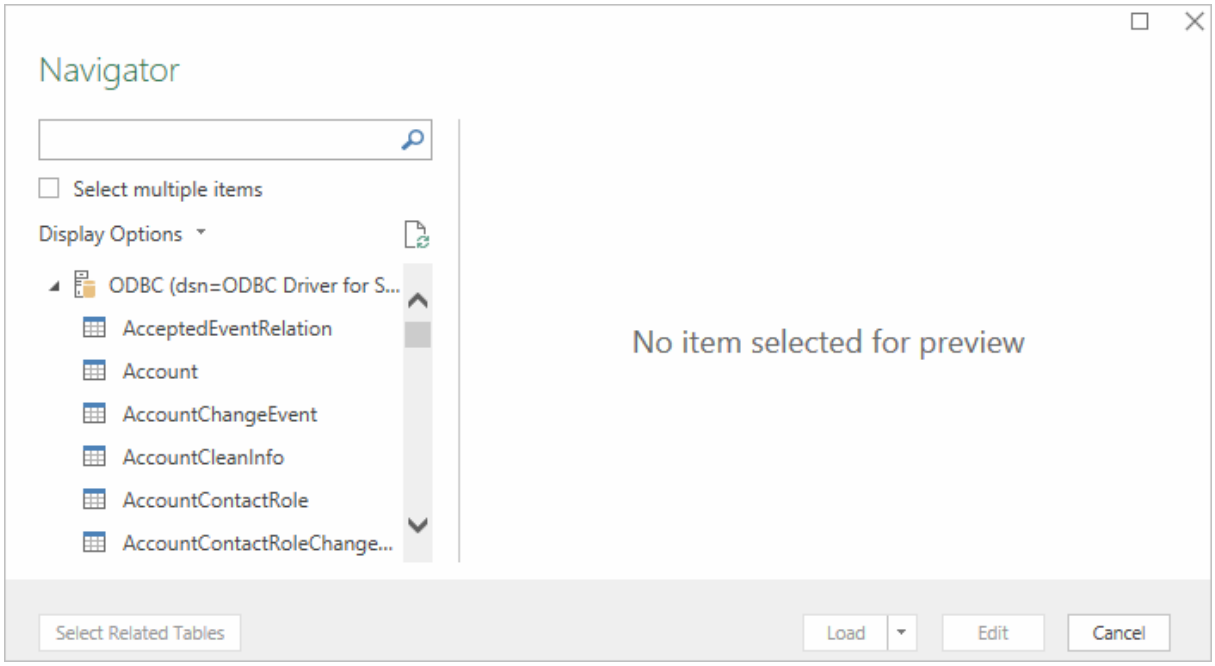
3. If you're using a database username or password, select **Database** and enter your credentials in the dialox bog, then click **Connect**.



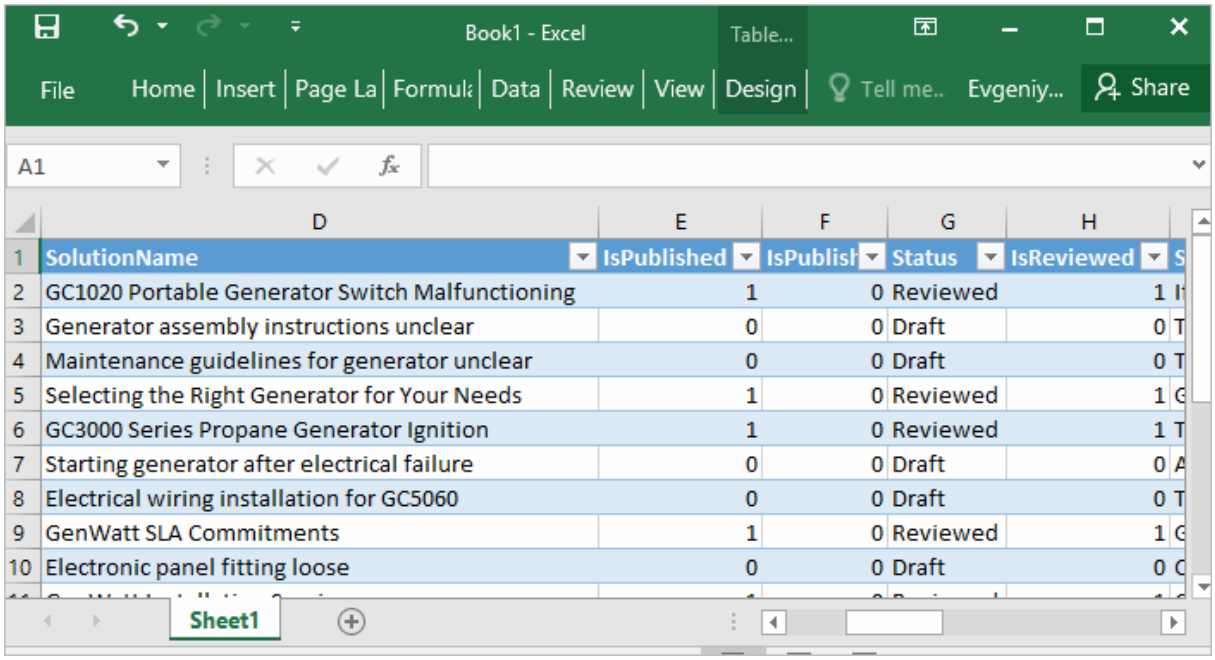
If your database is not password-protected or you've already specified your credentials in the ODBC data source settings, select **Default or Custom** and press **Connect**



4. In the window that appears, select the table you want to retrieve data from, and click **Load**.



The data from the table will be a displayed in an Excel spreadsheet where you can further work with it.



	D	E	F	G	H
1	SolutionName	IsPublished	IsPublish	Status	IsReviewed
2	GC1020 Portable Generator Switch Malfunctioning	1	0	Reviewed	1
3	Generator assembly instructions unclear	0	0	Draft	0
4	Maintenance guidelines for generator unclear	0	0	Draft	0
5	Selecting the Right Generator for Your Needs	1	0	Reviewed	1
6	GC3000 Series Propane Generator Ignition	1	0	Reviewed	1
7	Starting generator after electrical failure	0	0	Draft	0
8	Electrical wiring installation for GC5060	0	0	Draft	0
9	GenWatt SLA Commitments	1	0	Reviewed	1
10	Electronic panel fitting loose	0	0	Draft	0

Connecting Excel to Salesforce with Data Connection

Wizard (Legacy Wizard)

You can use this option to connect to OLE DB or ODBC external data source that has already been defined.

1. In Excel, go to the **Data** tab. Click **From Other Sources**, and then click **From Data Connection Wizard**.
2. In the opened dialog, select **ODBC DSN** and click **Next** to continue.
3. Now select a data source you want to connect to, and click **Next**.
4. To connect to the table containing the required data, select its name and click **Next** to enter and save information about your new file or click **Finish**.
5. In the **Import data** dialog, you can select the way your data will be viewed in Excel and the place where to put it in the worksheet, and click **OK**.
6. The required data is now displayed in the existing Excel worksheet.

Connecting Excel to Salesforce with the Query Wizard

You can use this option to create a simple query for retrieving data from Salesforce to Excel via ODBC driver.

1. Open Excel, in the main menu, click the **Data** tab.
2. Click the **From Other Sources** dropdown menu, and then click **From Microsoft Query**.
3. In the appeared dialog, you can choose the data source you want to connect to.
4. After a successful connection, you can select the data you want to be displayed in Excel and click **Next**.
5. The next two steps allow filtering and sorting the data. Click **Next** to skip these procedures.
6. If you plan to further use the query, you can save it by clicking the **Save** button on the right.
7. Select **Return Data To Microsoft Excel** and click **Finish**.
8. In the **Import data** dialog, you can select the way your data will be viewed in Excel and the place where to put it in the worksheet, and click **OK**.
9. The required data is successfully imported to Excel.

Connecting Excel to Salesforce with Microsoft Query

You can use this option to create a more complex query for retrieving Salesforce data to Excel via ODBC driver.

1. Start Excel, click the **Data** tab.
2. In the appeared ribbon, click **From Other Sources**, and then click **From Microsoft Query**.
3. In the next dialog, choose the data source you want to connect to (e.g., using data source name - Devart ODBC Salesforce). Uncheck **Use the Query Wizard to Create/Edit Queries** and click **OK**.
4. Now you can select the tables you want to add to your query. When you finish, just click the **Add** button.
5. In the graphical editor, you can filter rows or columns of data, sort data, join multiple tables, create a parameter query, etc.

Connecting Excel to Salesforce with PowerPivot

You can use PowerPivot - an Excel add-in to perform data analysis and create complex data models. To load the required data, do the following:

1. In Excel, click the **PowerPivot** tab, then click **Manage** to go to the PowerPivot window.
2. In the opened window, click **From Other Sources**.
3. When the **Table Import Wizard** opens, select **Others (OLEDB/ODBC)** and click **Next**.
4. In the **Specify a Connection String** window, click the **Build** button.
5. In the **Data Link Properties** dialog, specify the data source you want to connect (e.g., using data source name - Devart ODBC Salesforce), and then click **Next**.
6. Now you should choose how to import the data (either select a table from the list or write a query to specify the data to be imported).
7. When the Import operation succeeded, click the **Close** button. The retrieved data is inserted in the active worksheet.

4.6 Using in SQL Server Management Studio

This section describes how to establish and troubleshoot a connection to Salesforce from SQL Server Management Studio using ODBC Driver for Salesforce.

- Creating a Linked Server
- Troubleshooting in SSMS

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4.6.1 Creating a Linked Server

Requirements

In order to avoid incorrect integration with MS SSMS, the working environment must meet the following conditions:

- The data source must be a configured system DSN. Refer to the Driver Configuration article to learn how to configure a System DSN
- The driver, studio, and SQL Server must be of the same bitness. For example, if you are using 64-bit SQL Server Management Studio on 64-bit Windows platform, then configure the 64-bit version of the driver using ODBC Administrator launched from %windir%\system32\odbcad32.exe. Otherwise, configure the driver using the 32-bit version of ODBC Administrator - launch it from %windir%\SysWOW64\odbcad32.exe.
- ODBC Driver for Salesforce and SQL Server must be installed on the same computer.
- .NET Framework 4.5 must be installed on the computer.

Connecting to Salesforce from SQL Server Management Studio using ODBC Driver for Salesforce

You can use the Microsoft SQL Server Management Studio to connect your Salesforce data to an SQL Server instance. Linked Server is a tool of MS SQL Server that allows to execute distributed queries to refer tables stored on non-SQL Server datbase in a single query. With linked servers, you can execute commands against different data sources such as Salesforce and merge them with your SQL Server database. You can create a linked server

with one of these methods: by using the options in the Object Explorer or by executing stored procedures.

Below are major advantages of using SQL Server Linked Servers to connect to Salesforce:

1. The ability to connect other database instances on the same or remote server.
2. The ability to run distributed queries on heterogeneous data sources across the organization.
3. The ability to work with diverse data sources in the same way.

How to configure a SQL Server Linked Server to connect to Salesforce

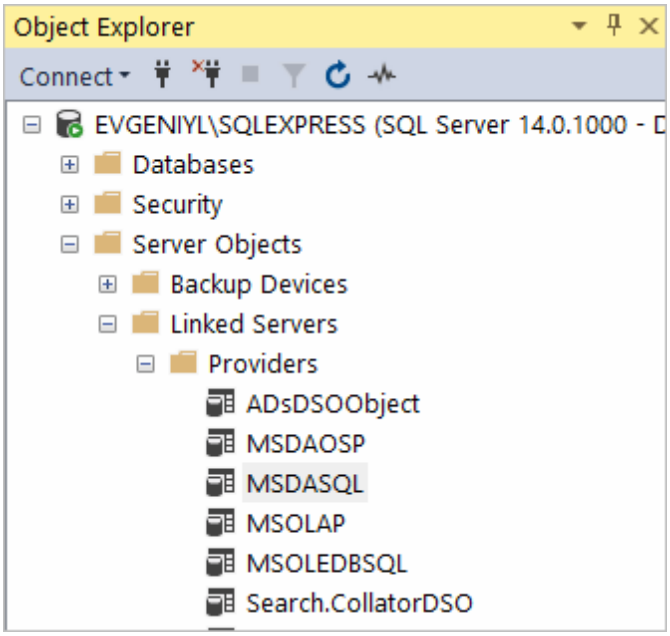
You can follow the steps to create a linked server for Salesforce in SQL Server Management Studio by using Object Explorer:

1. Start your Management Studio and choose your SQL Server instance.
2. In the **Object Explorer pane**, expand the **Server Objects**, right-click on **Linked Servers** and then click on **New Linked Server**.
3. Configure your linked server in the dialog box:
   - Give a name for your server in the **Linked server** field.
   - Under **Server type**, select **Other data source** .
   - Choose **Microsoft OLE DB Provider for ODBC Drivers** in the **Provider** drop-down list.
   - In the **Data source** field, enter the name of your DSN, e.g. Devart ODBC Driver for Salesforce . Alternatively, you can input the ODBC Driver connection string in the **Provider** field.

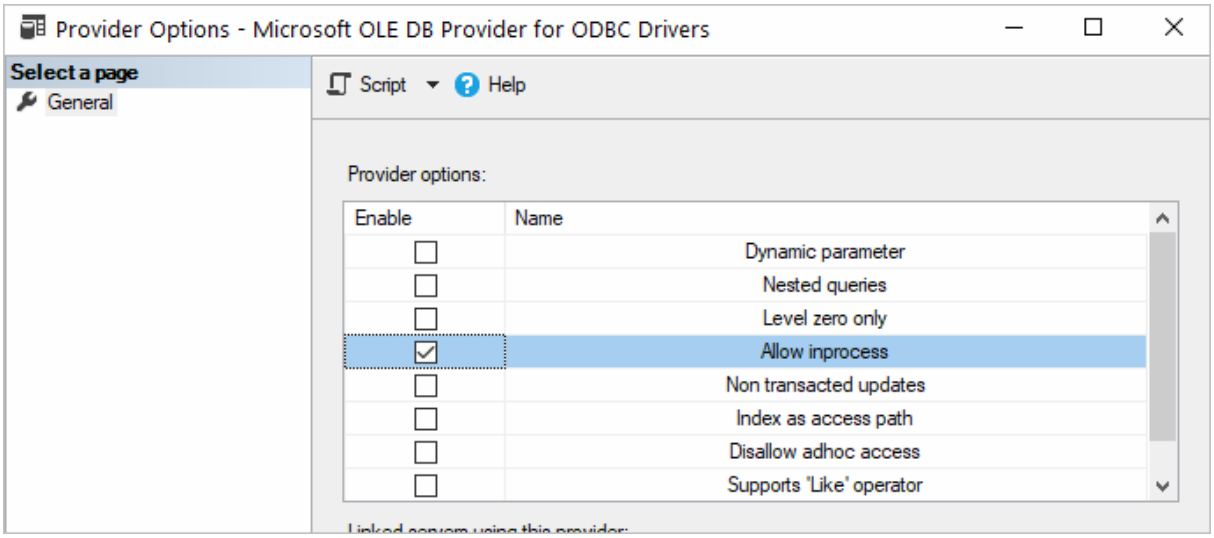
The linked server will appear under the Linked Servers in the Object Explorer Pane. You can now issue distributed queries and access Salesforce databases through SQL Server.

Retrieving Data From Salesforce

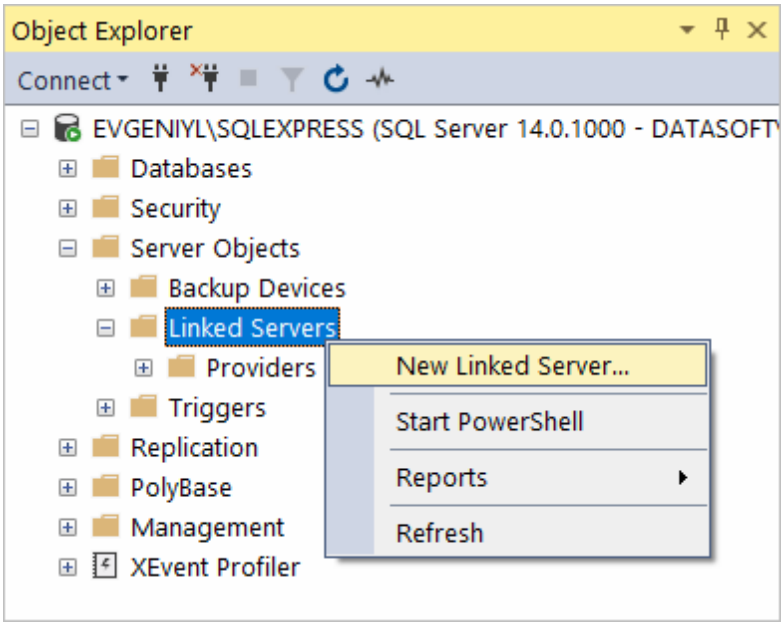
Ensure the **Allow inprocess option** of MSDASQL OLE DB Provider for ODBC Drivers is enabled. For this, find the **MSDASQL** provider in the list of Linked Servers and double-click on it



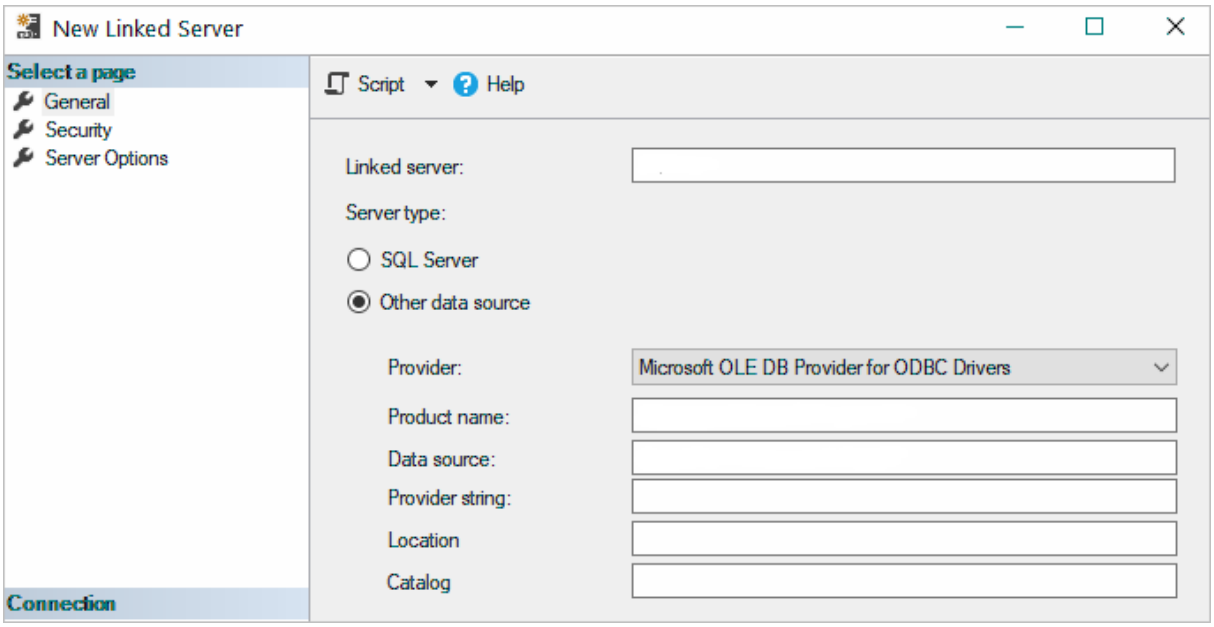
In the appeared **Provider Options** window, enable the **Allow inprocess** checkbox:



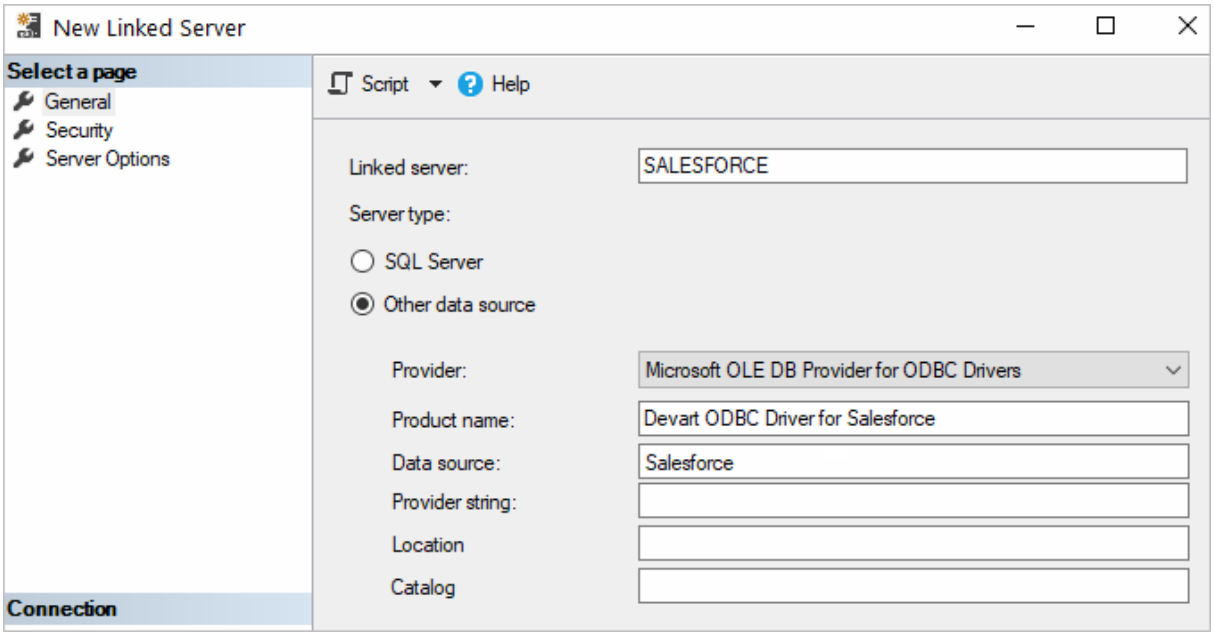
Create a new **Linked Server**



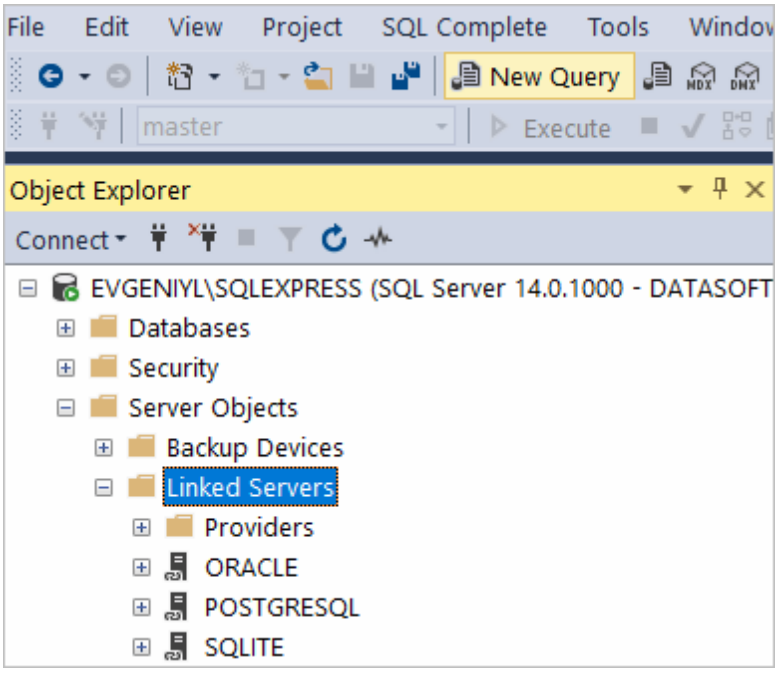
Make sure to select **Microsoft OLE DB Provider for ODBC Drivers**:



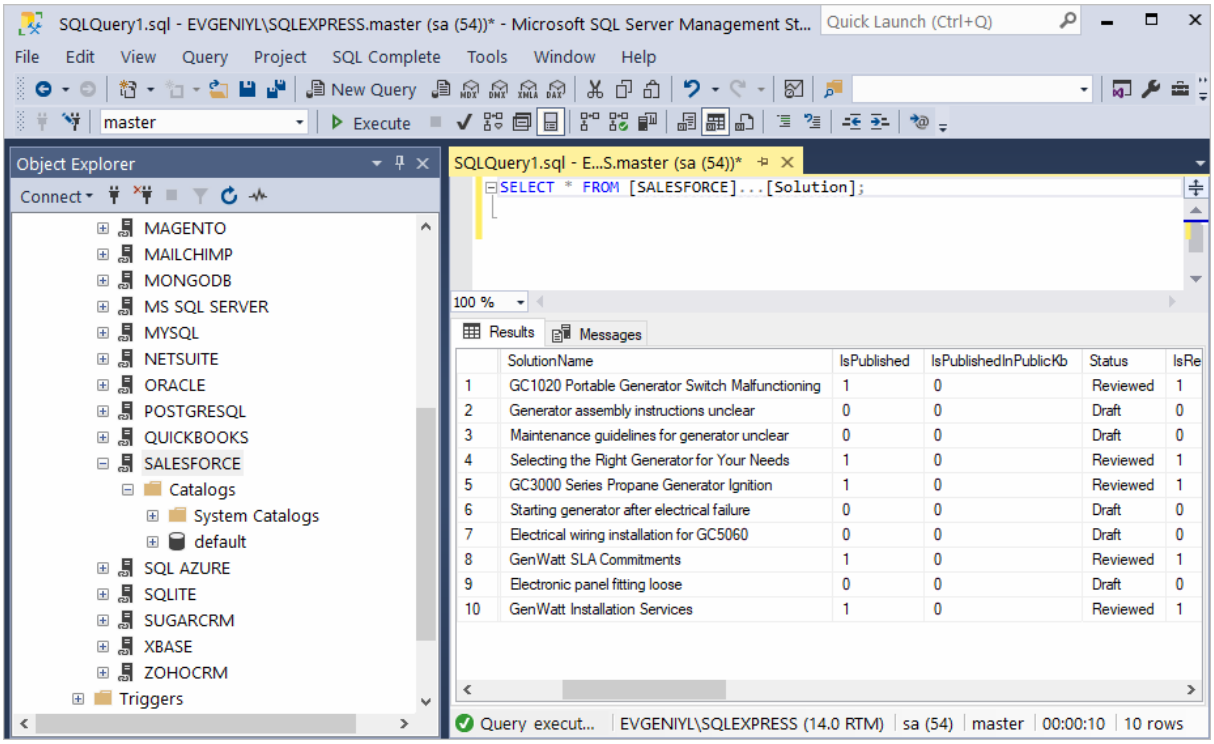
Now you need to input the Linked Server name, e.g. SALESFORCE. In the Product Name and Data Source fields you need to indicate the System DSN that you've previously created - more info on System DSN setup can be found here.



The Salesforce tables are already available to be fetched. To query the linked server, click **New Query** in the toolbar:



Enter your SQL query in the editor window and click **Execute** to run the query:



As a result, you can see the contents of the selected table retrieved directly from the Salesforce account you are connected to.

See also

- Troubleshooting SSMS

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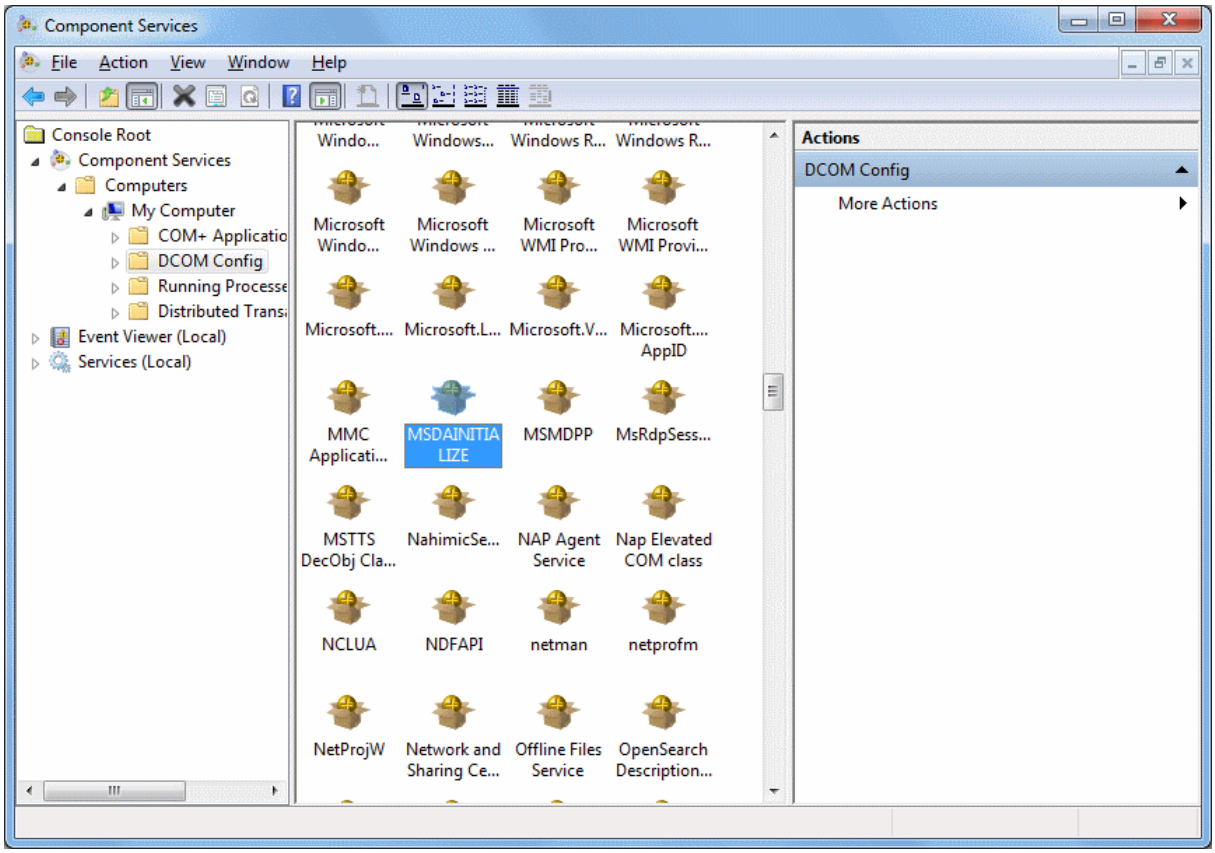
4.6.2 Troubleshooting in SSMS

When creating a linked server in SSMS, most errors happen due to security issues with DCOM class MSDAINITIALIZE. We need to alter the DCOM Class MSDAINITIALIZE security settings to make it work.

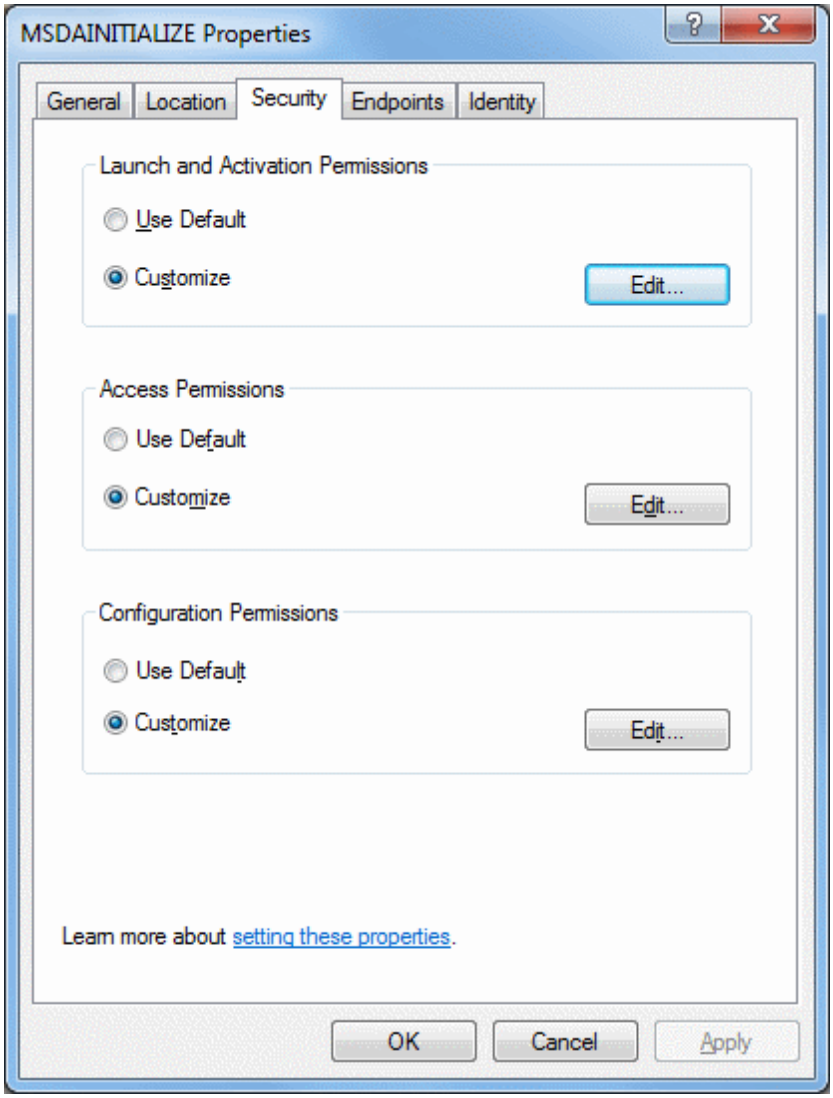
Following are the steps:

1. Open Component Services (Start>Run>DCOMCNFG)
2. Expand Component Services>Computers>My Computer>DCOM Config
3. From the list of DCOM components on the right side, select **MSDAINITIALIZE** and go to its

properties:



4. Go to the Security Tab, Choose ‘Customize’ and click on the ‘Edit’ Button:

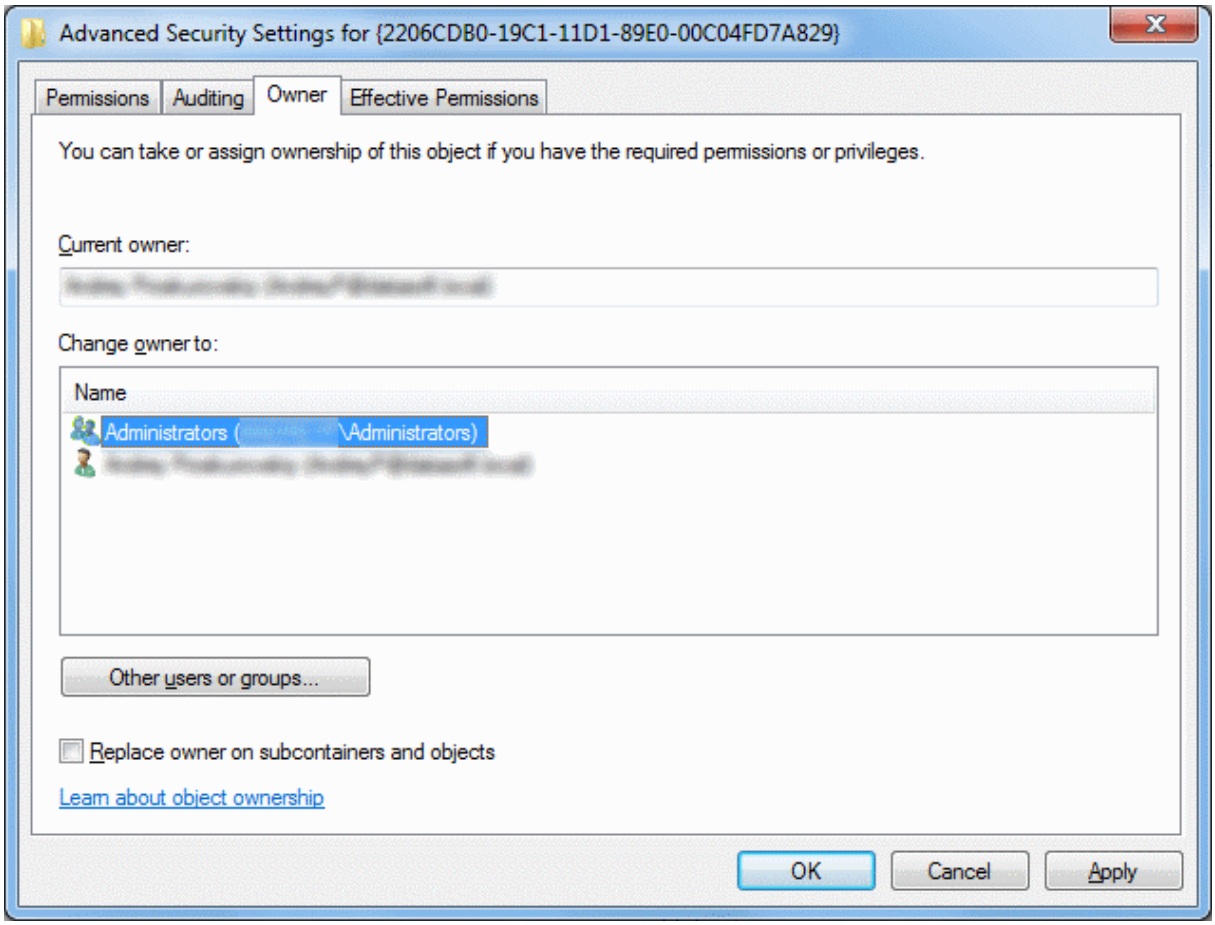


5. Add the Domain User who is accessing the linked server and ‘Allow’ all the permissions available (Local Launch, Remote Launch, Local Activation, Remote Activation). If you are connecting to SQL server using SQL account, you need to provide this permission to the account under which the SQL service is running.
6. Do this for all the 3 sections in the above screenshot.

To edit the Security settings, we followed the below steps:

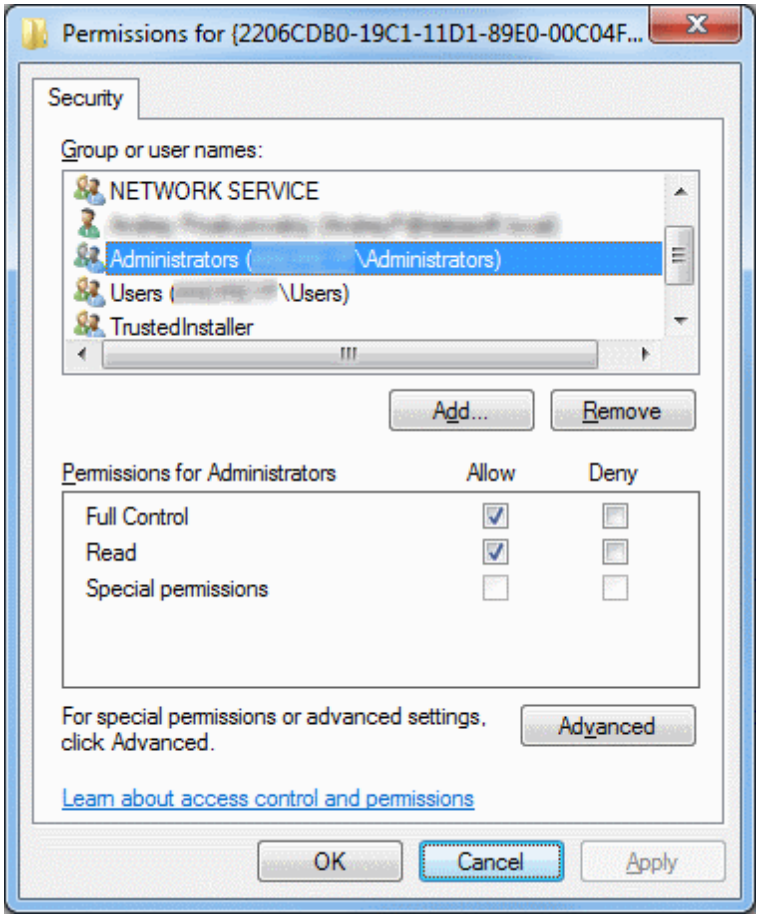
1. Start > Run > Regedit
2. Find the Key: HKEY_LOCAL_MACHINE\SOFTWARE\Classes\AppID\{2206CDB0-19C1-11D1-89E0-00C04FD7A829}

3. Right Click>Permissions>Advanced>Owner Tab:



4. Change the owner to Administrators.

5. Now, grant ‘Full Control’ to Administrators:



After this you should be able to edit MSDAINITIALIZE security settings .

See also

- Error message when you try to create an instance of an OLE DB provider in SQL Server: "Cannot create an instance of OLE DB provider"

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4.7 Using in OpenOffice and LibreOffice

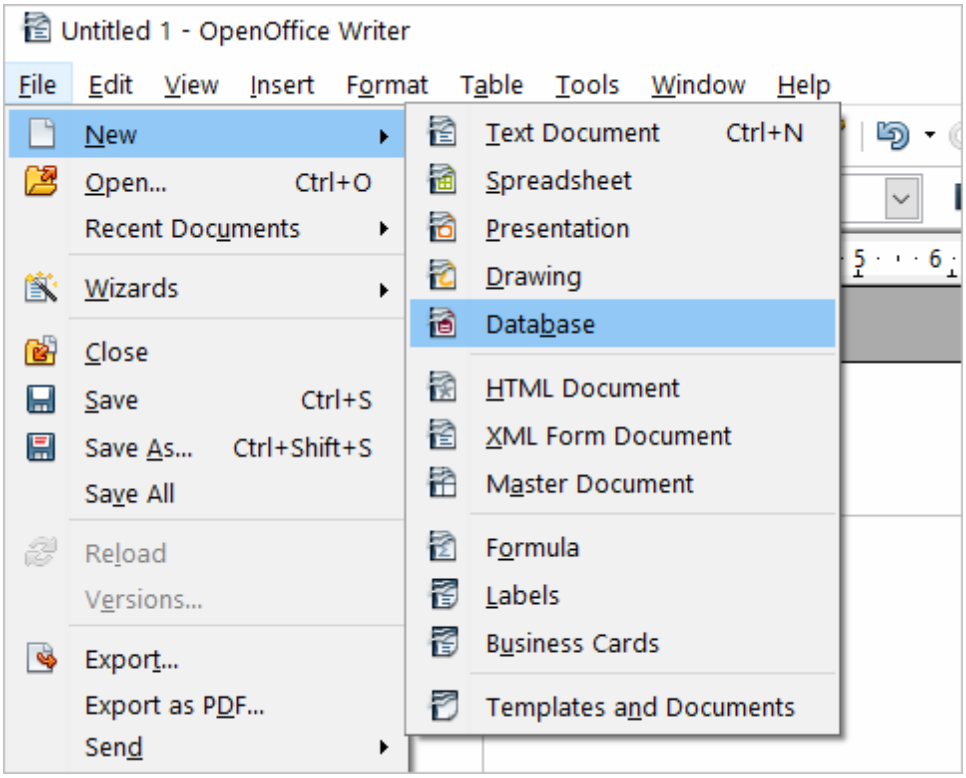
Connecting to Salesforce from OpenOffice and LibreOffice using ODBC Driver for Salesforce

The article describes how to use Apache OpenOffice and LibreOffice to access ODBC data sources using the respective driver. You can access Salesforce data from Open Office Base or LibreOffice Base — desktop database management systems. Note that the Windows version of OpenOffice is 32-bit, and you may get the error “The specified DSN contains an architecture mismatch between the Driver and Application” when trying to access a data source through a 64-bit ODBC driver. To get rid of the error message, set up the 32-bit version of the driver.

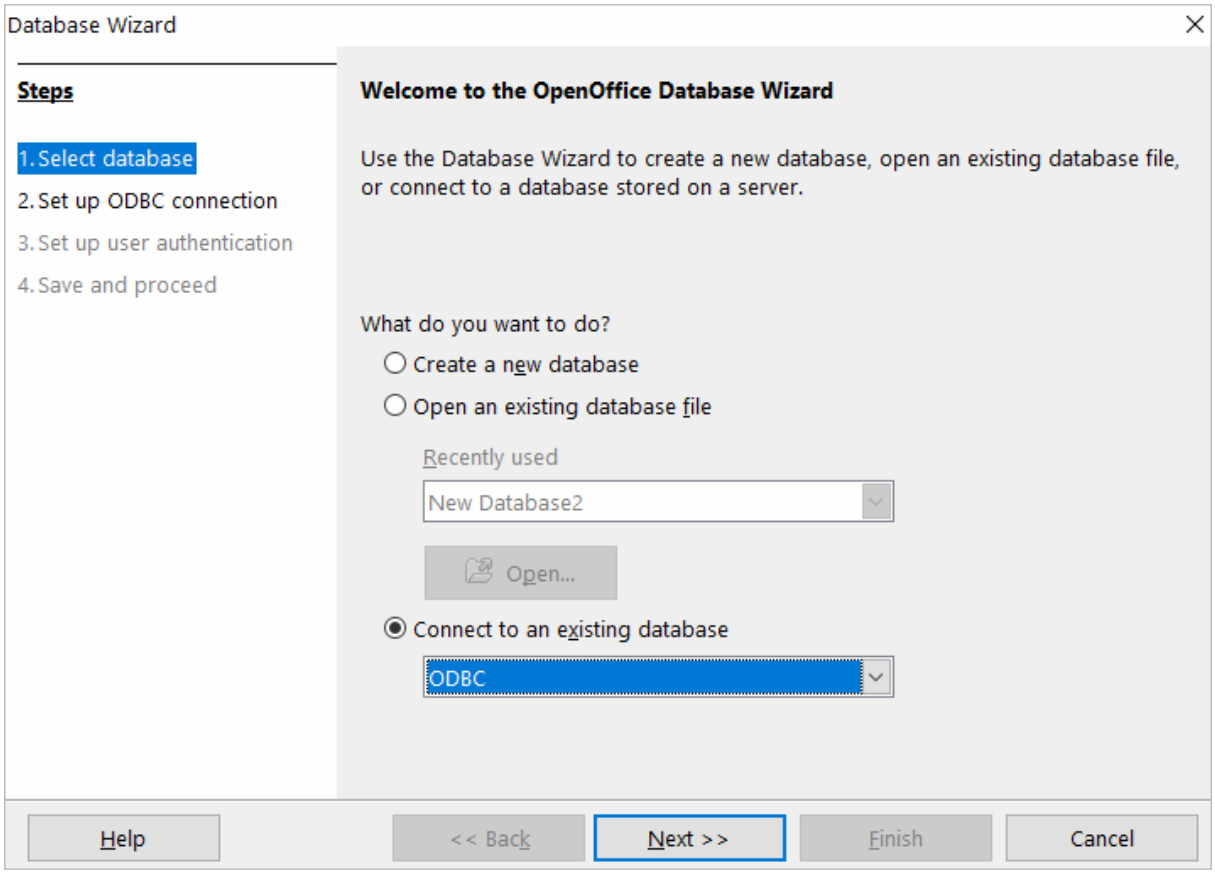
To connect to an ODBC data source from OpenOffice or LibreOffice using our driver for Salesforce, perform the steps below:

1. Start OpenOffice or LibreOffice, click **Database** to open the **Database Wizard**.

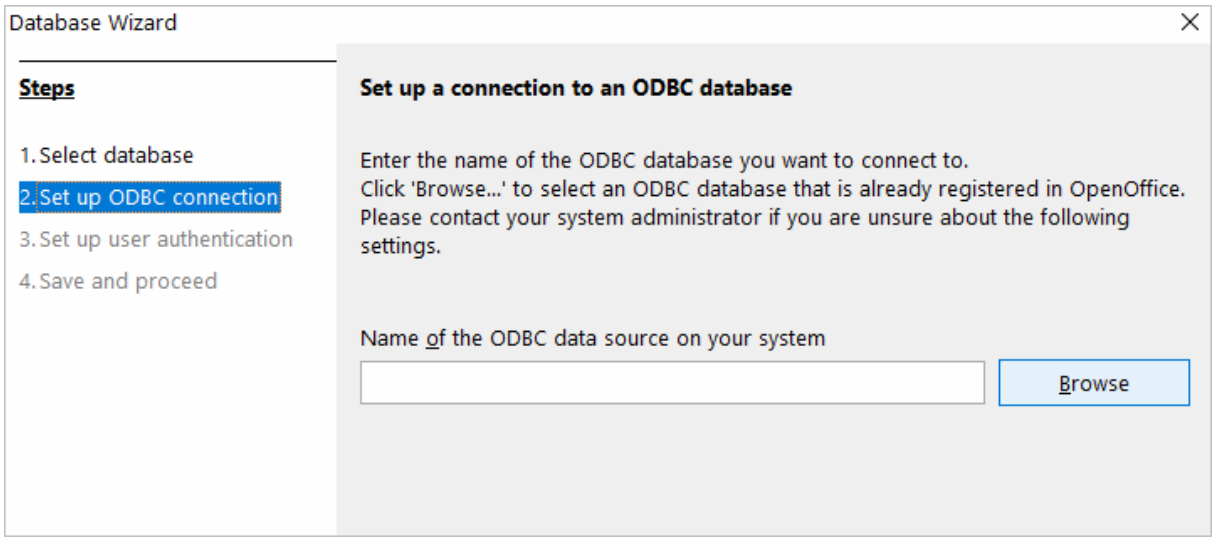
Alternatively, you can launch the **Database Wizard** from OpenOffice or LibreOffice Calc, Writer or any other tool by choosing **File > New > Database**.

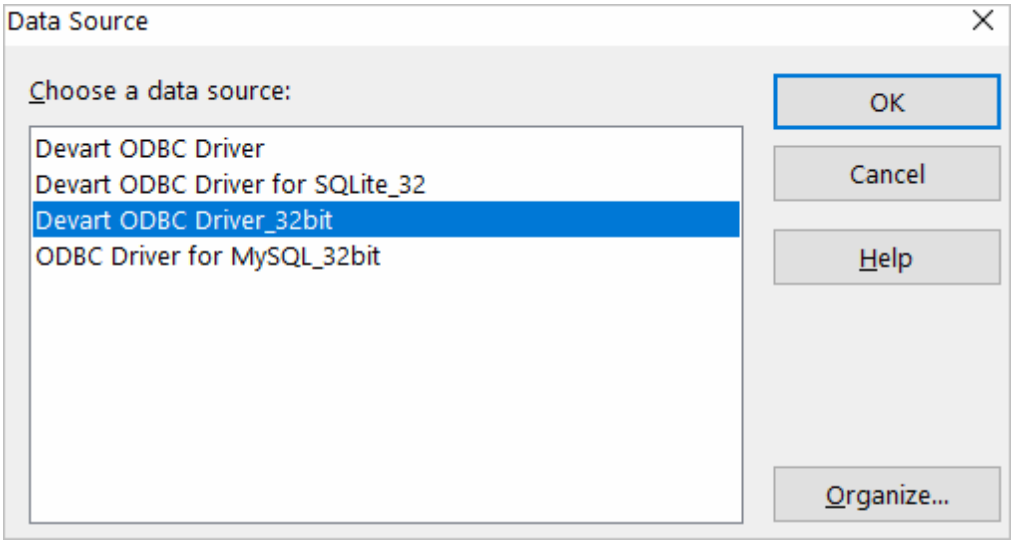


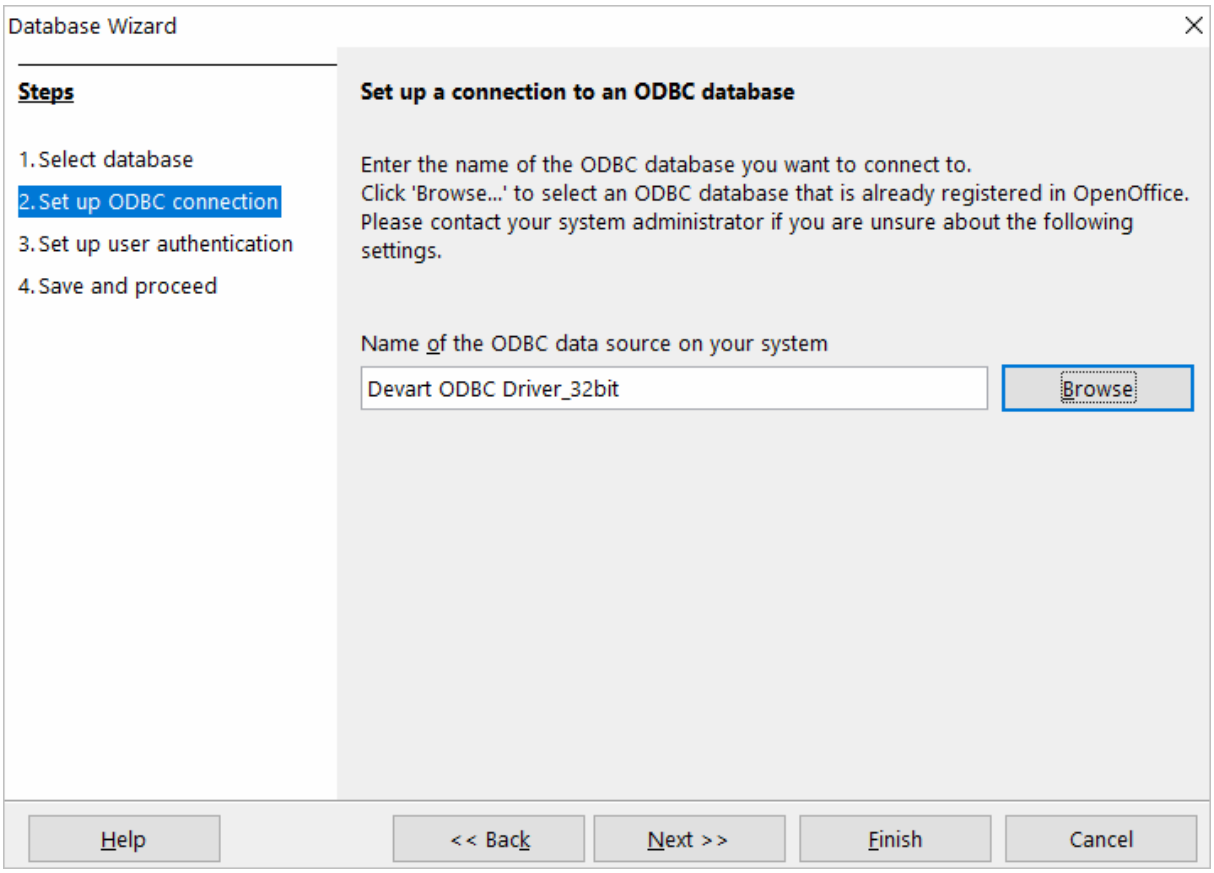
2. In the **Database Wizard dialog box**, click **Connect to an existing database**, select **ODBC** from the drop-down list, and click **Next**.



3. Specify the name of the data source you want to connect to. You can either type the name of your data source into the field, e.g. **ODBC Driver for Salesforce**, or you can click **Browse**, double-click the data source you need, and then click **Next**.

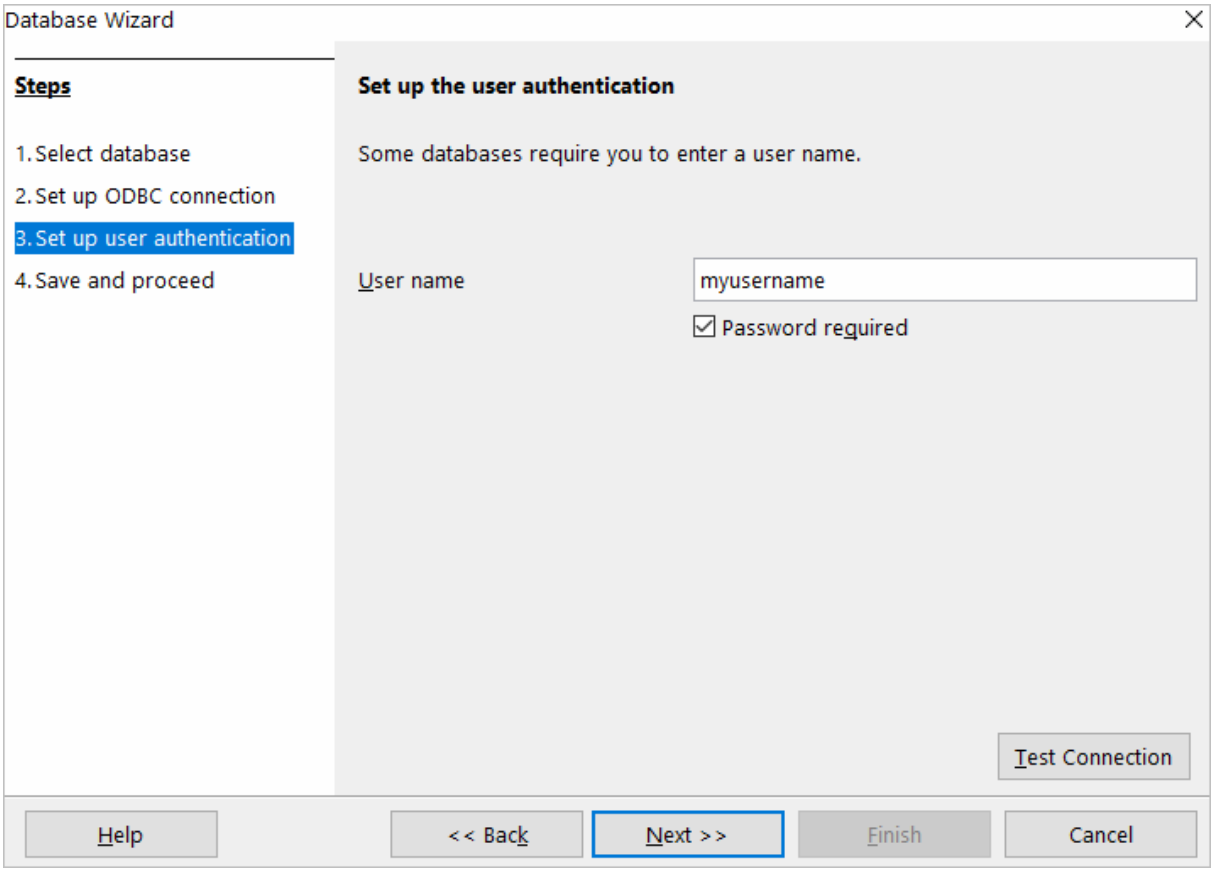




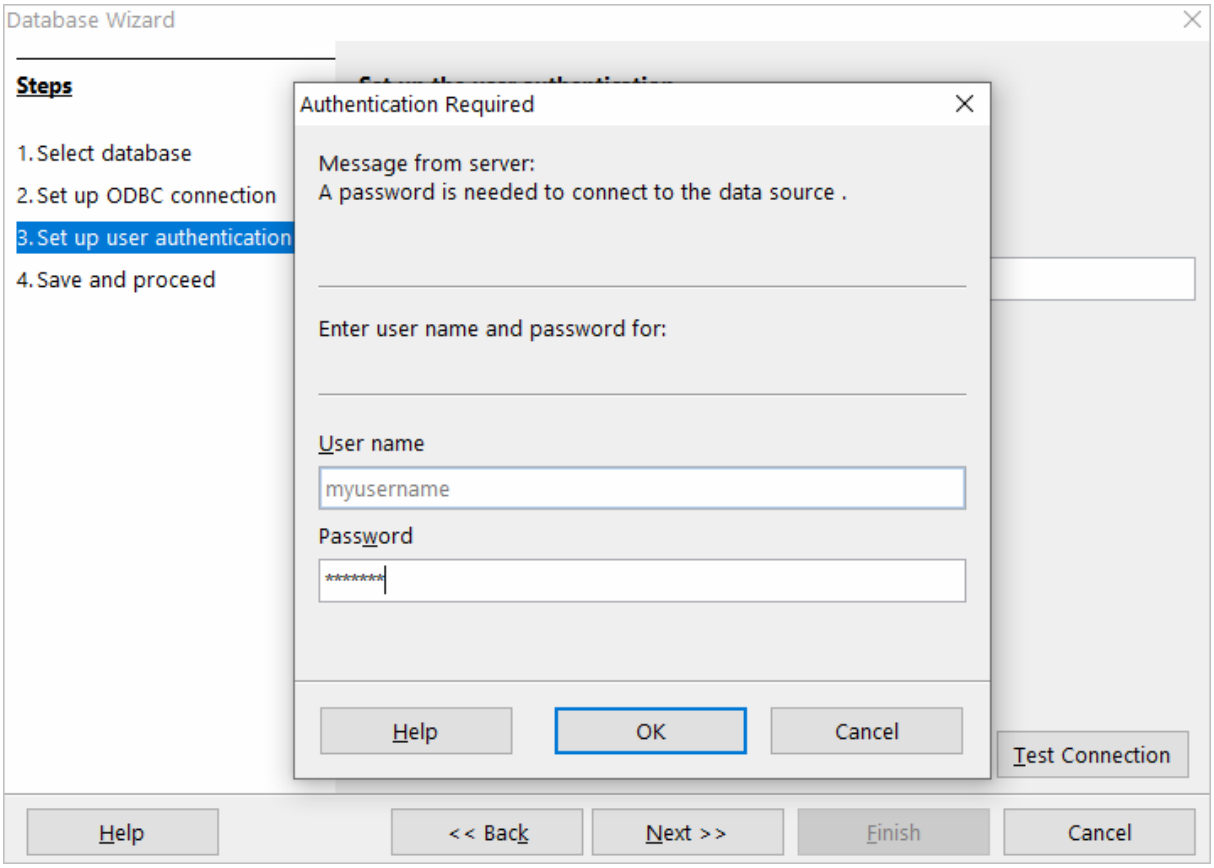


4. If your database requires a user name, type it into the **User name** field. If you are connecting to a password protected database, check the **Password required** field. Alternatively, you can specify these parameters in the data source settings of your ODBC

Driver for Salesforce and leave these fields empty in **Database Wizard**.

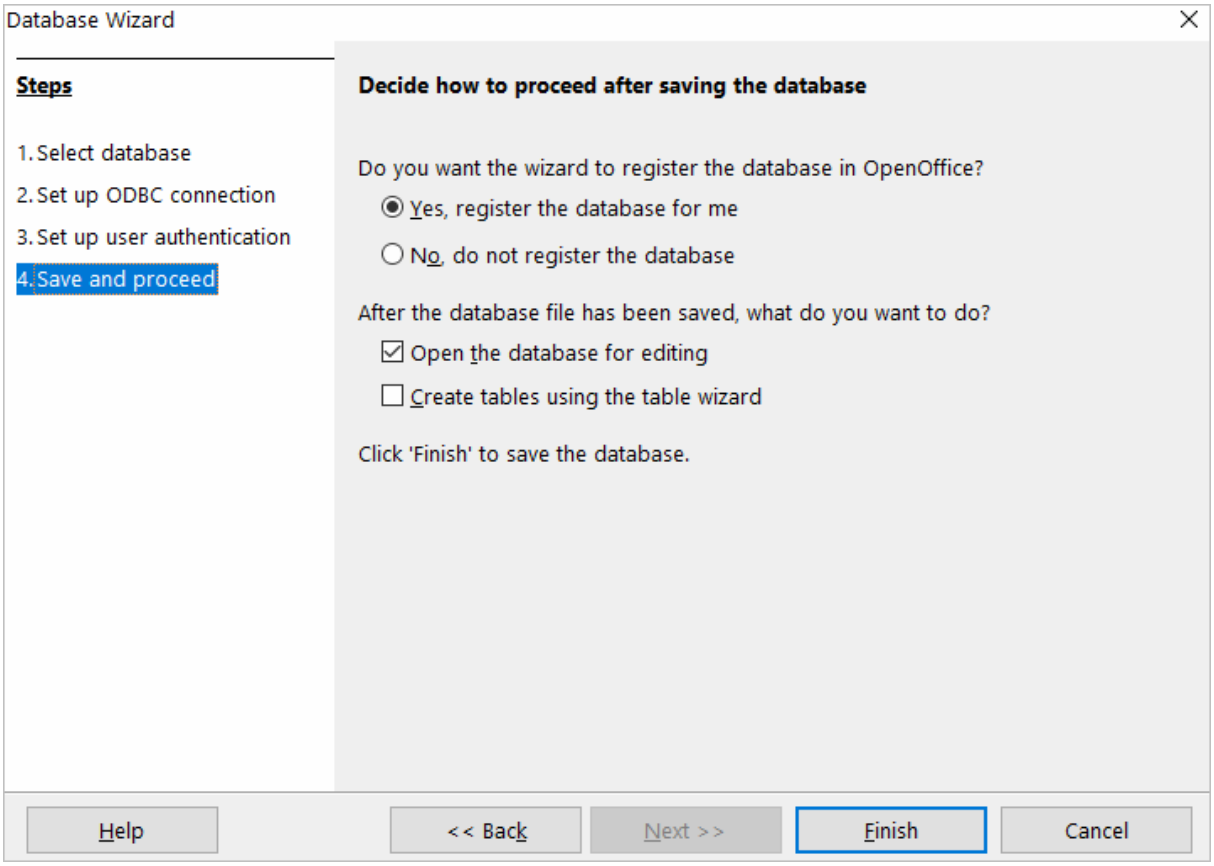


To test the connection to your data source, click **Test Connection**, input your credentials and click **OK**.

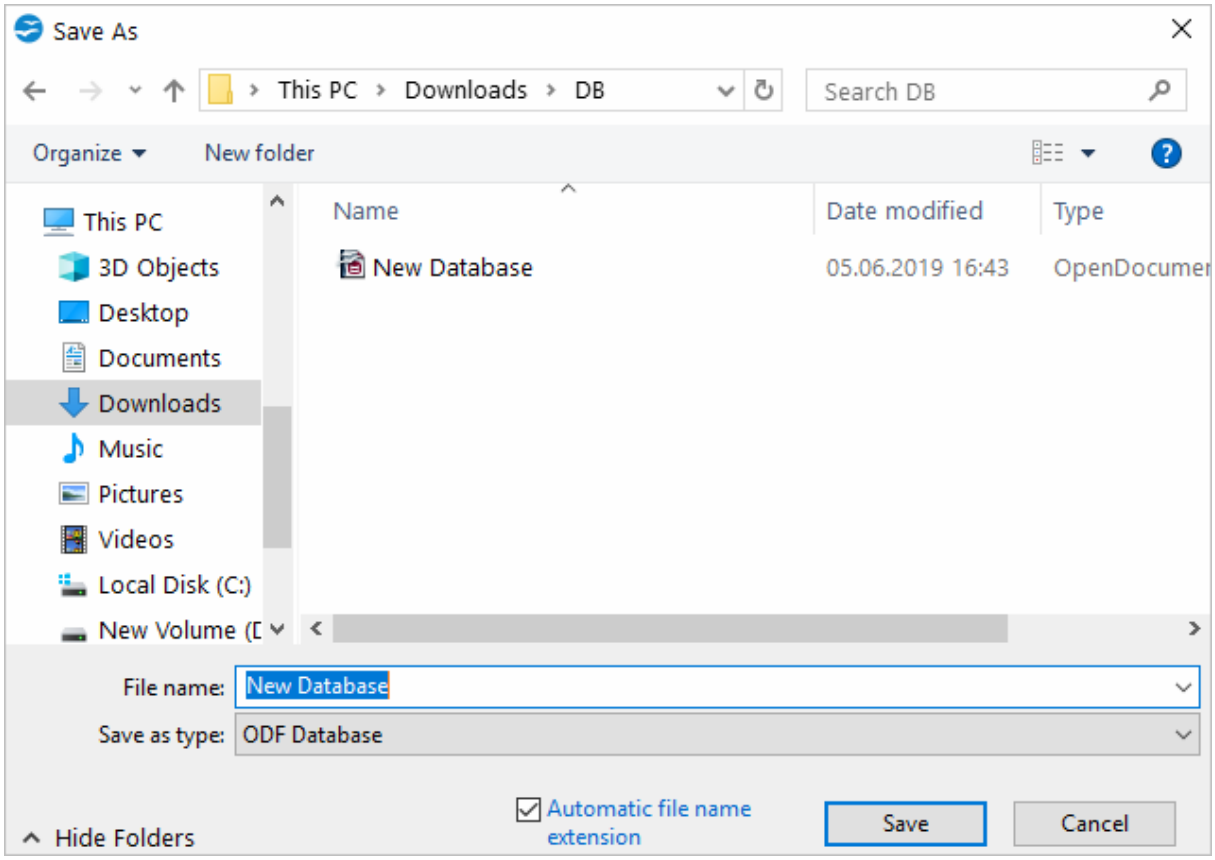


If you have entered valid credentials, you will see a success message. Click **Next** to proceed to the final step.

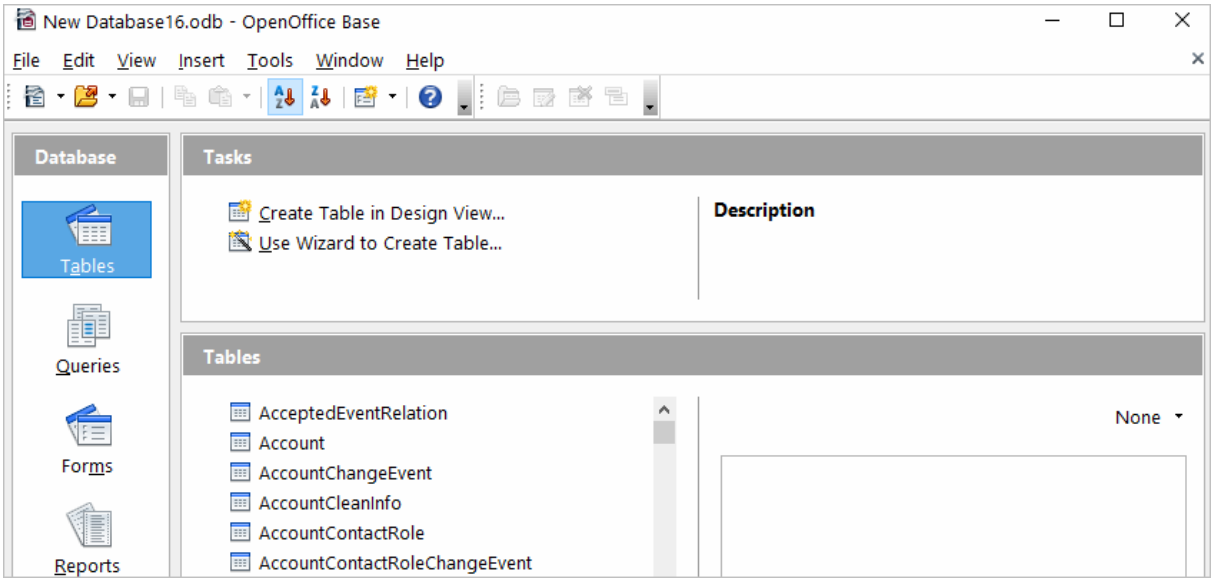
5. You can keep the default selection in this dialog box and click **Finish**.

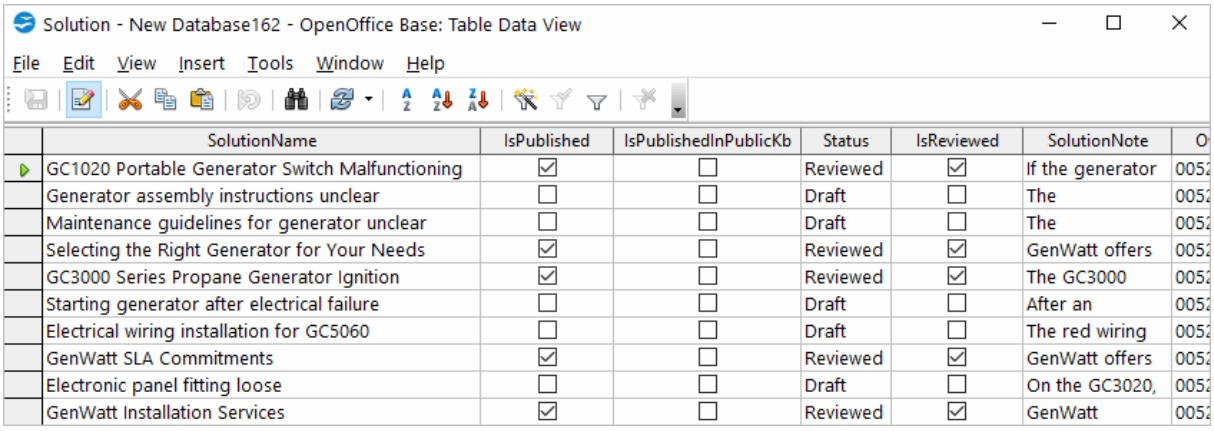


You will be prompted to give a name to your new database and select the directory where you want to store it.

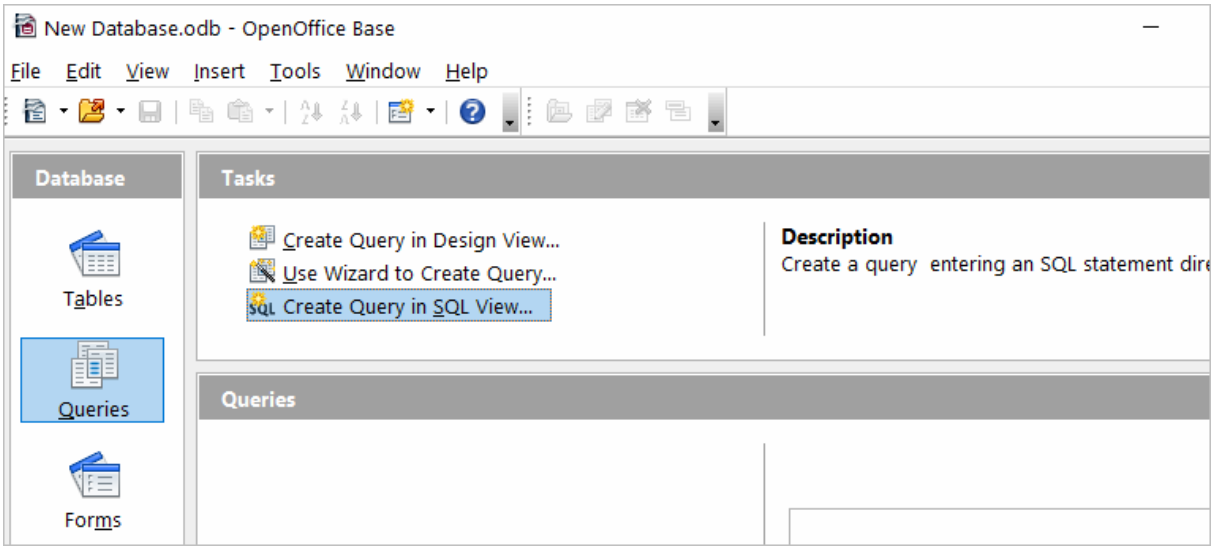


6. When the database opens, you will see the list of tables from your data source diplayed in OpenOffice or LibreOffice Base workspace. To view the data from a specific table, double-click the table name.

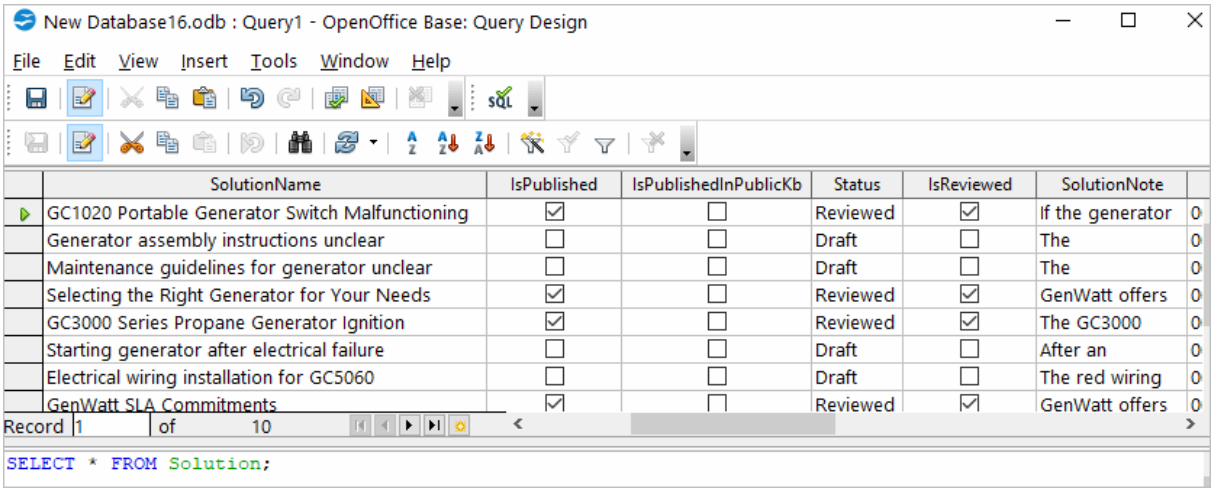




7. To create an SQL query, click **Queries** in the **Database** pane, then click **Create Query in SQL View...**



Enter your query in the query text box and click **Run Query (F5)**. The date will be fetched from the database and displayed in Open Office or LibreOffice, respectively.



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4.8 Using in PHP

Connecting to Salesforce from PHP using ODBC Driver for Salesforce

PHP is one of the most popular programming languages for website development. ODBC drivers are connectors that make PHP development database agnostic — your software written in PHP will function with any vendor's database management system. You can use functions like odbc_exec() to prepare and execute SQL statements against any databases like MySQL, SQLite, PostgreSQL, etc.

PHP-based projects usually require a data storage, whether a traditional database or a cloud-based database. You can establish a connection to them using ODBC interface. With our ODBC drivers, you can access various data sources and retrieve tables and fields from a database.

Below is a sample PHP script for accessing Salesforce via ODBC. The script connects to Salesforce database and fetches all records from a table:

Step 1: Connect to ODBC data source

The *odbc_connect()* function is used to connect to an ODBC data source. Note that the function takes three mandatory parameters: the data source name, username and password. If your database is not password-protected or doesn't require a username, leave these parameters empty. In the following example, a connection is established using the *odbc_connect()* function in PHP.

```
<?php
   $user = "myusername";
   $password = "mypassword";
   $ODBCConnection = odbc_connect("DRIVER={Devart ODBC Driver for Salesforc
```

Step 2: Execute an SQL statement

If connection is successful, the *odbc_exec()* function is used to execute a SELECT statement against the *dept* table in the *autotest* database.

```
$SQLQuery = "SELECT * FROM autotest.dept";
   $RecordSet = odbc_exec($ODBCConnection, $SQLQuery);
```

Step 3: Print the result set

The *odbc_fetch_row()* function is used to return records from the result set. While *odbc_fetch_row()* returns rows, the *odbc_result_set()* function prints a set of result in HTML table. After all rows from the result set have been printed, the *odbc_close()* function closes the connection.

```
  while (odbc_fetch_row($RecordSet)) {
       $result = odbc_result_all($RecordSet, "border=1");
```

```
    }
    odbc_close($ODBCConnection);
?>
```

You can modify this script by specifying general settings for each Devart ODBC driver to use any of them with your PHP projects.

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4.9 Using in Power BI

Importing Salesforce Data into Power BI Through an ODBC Connection

Power BI is a popular business intelligence solution that is comprised of services, apps, and connectors that allow you to pull raw data from various sources and create meaningful reports. To connect Power BI to a data source such as Salesforce, you can use a corresponding ODBC driver.

This tutorial explores how to connect to Salesforce and import data into Power BI Desktop using an ODBC driver. It is assumed that you have already installed and configured a DSN for ODBC driver for Salesforce.

1. Run Power BI Desktop and click **Get Data**.
2. Select the **Other** category in the **Get Data** dialog box, then select **ODBC**. Click **Connect** to confirm the choice.
3. In the **From ODBC** dialog box, expand the **Data Source Name (DSN)** drop-down list and select the previously configured DSN for Salesforce
4. If you would like to enter a SQL statement to narrow down the returned results, click the **Advanced options** arrow, which expands the dialog box, and type or paste your SQL statement.
5. Click **OK**. If your data source is password-protected, Power BI will prompt you for user credentials. Type your **Username** and **Password** in the respective fields and click.
6. Now you should see the data structures in your data source. You can preview the contents of the database objects by clicking on them.
7. To load the Salesforce data into Power BI for analysis, select the needed table and click

Load.

4.10 Using in Python

Installing the ODBC Driver for Salesforce

One of the most convenient methods to connect to an external database or access cloud data from Python is via ODBC. Devart has developed a range of ODBC Drivers for Python to work with databases and cloud services.

If you don't have Python installed on your machine, go to the Python official website, download the appropriate installer and run it. You will also need to install the **pyodbc** module — the easiest way to do that is by using the *pip install pyodbc* command in the Python interactive mode. Next, you need to download the ODBC Driver for Salesforce. To use the ODBC driver as a translation layer between the application and the database, you need to configure it by following the installation instructions.

Connecting to Salesforce from Python using ODBC Driver for Salesforce

Here's an example to show you how to connect to Salesforce via Devart ODBC Driver in Python. First we import the pyodbc module, then create a connection to the database, insert a new row and read the contents of the EMP table while printing each row to the Python interactive console. To execute the script, you can type the code directly in the interactive console or add the code to a file with the .py extension and run the file from the command prompt.

Step 1: Connect

```
import pyodbc
cnxn = pyodbc.connect('DRIVER={Devart ODBC Driver for Salesforce};User ID=my
```

Step 2: Insert a row

Here's a simple example of how to execute an *insert* statement to test the connection to the database. The script inserts a new record to the EMP table.

```
cursor = cnxn.cursor()
cursor.execute("INSERT INTO EMP (EMPNO, ENAME, JOB, MGR) VALUES (535, 'Scott
```

Step 3: Execute query

The *cursor.execute()* function retrieves rows from the *select* query on a dataset. The *cursor.fetchone()* function iterates over the result set returned by *cursor.execute()* while the *print()* function prints out all records from the table to the console.

```
cursor = cnxn.cursor()
cursor.execute("SELECT * FROM EMP")
row = cursor.fetchone()
while row:
 print (row)
 row = cursor.fetchone()
```


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4.11 Using in QlikView

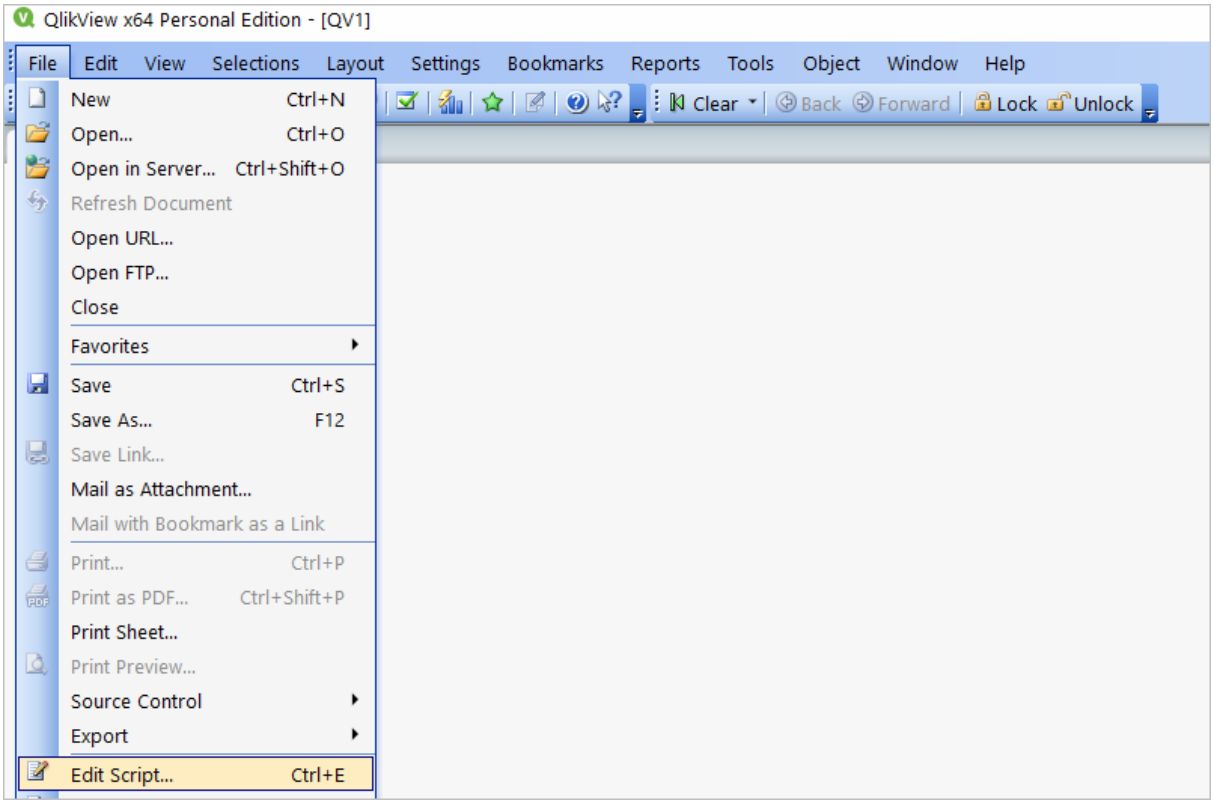
Connecting to Salesforce from QlikView using ODBC Driver for Salesforce

This tutorial describes how to connect and configure QlikView to retrieve data from Salesforce for further analysis. QlikView is a data visualization tool that connects and pulls data from different popular databases like MySQL, MongoDB, Oracle, SQL Server, Postgres, etc. to present it in a single view. The business intelligence platform identifies relationships in your data and discovers patterns and opportunities to support your decision making.

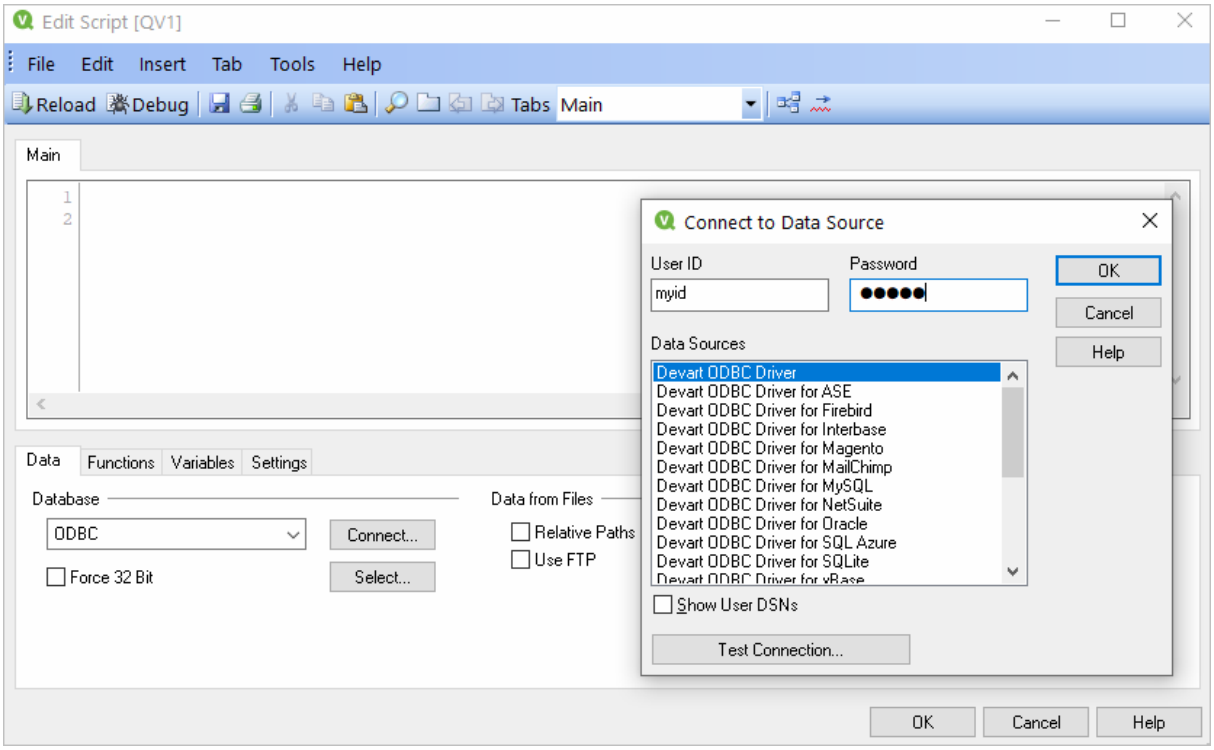
QlikView supports the ODBC connectivity interface for communication with external data sources. An ODBC data source must be configured for the database you want to access. You can create an ODBC connection using a DSN during the ODBC driver installation or later.

To connect to an ODBC data source from QlikView using our driver for Salesforce, perform the steps below:

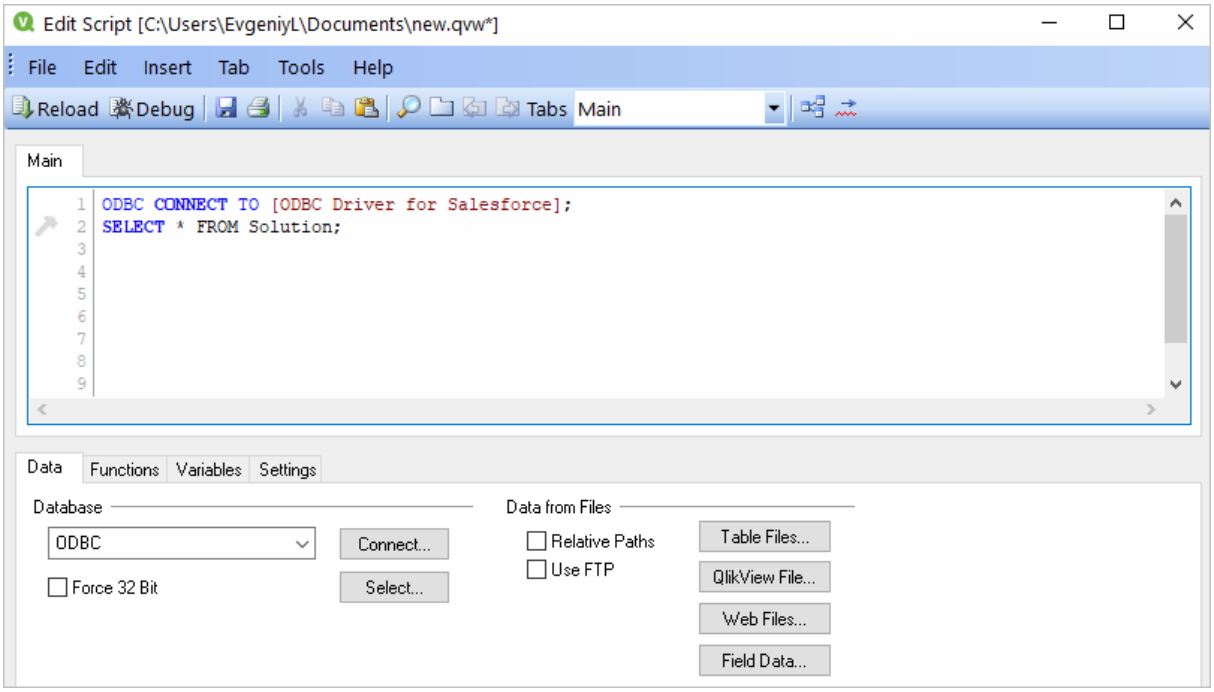
1. Open the QlikView client application and click **File > New**. Close the **Getting Started** wizard and open **File > Edit Script (CTRL+E)**.

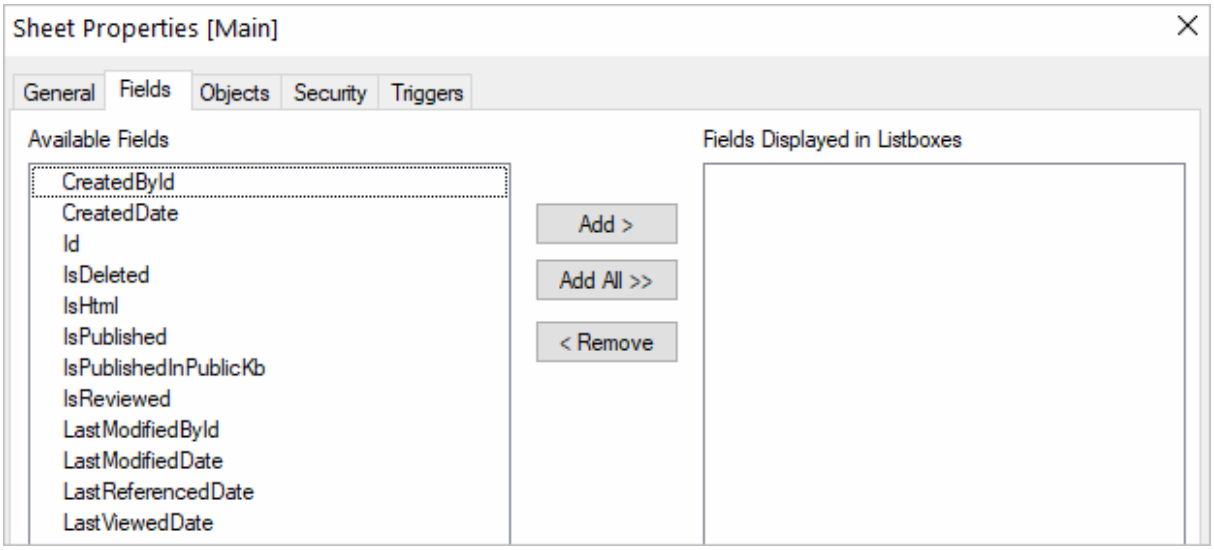


2. In the **Data** tab, choose **ODBC** from the **Database** drop-down and click **Connect**. Select the **Data Source** you created earlier, type in the **User ID** and **Password** if your database is password-protected. You can test the connection by choosing **Test Connection**. The **Connection Test succeeded** message should appear. Click **OK** to connect to your data source.

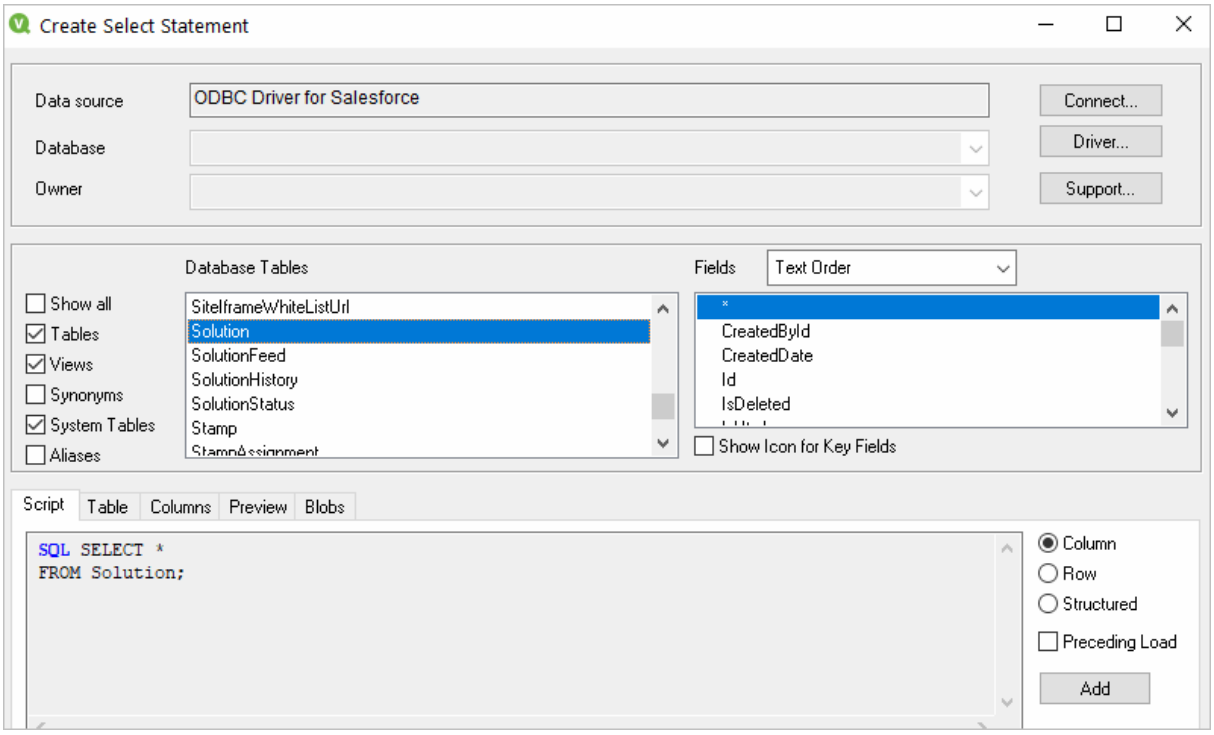


3. To retrieve the data from your data source, you can enter an SQL query and press **F5**. You will be suggested to choose fields to be displayed.

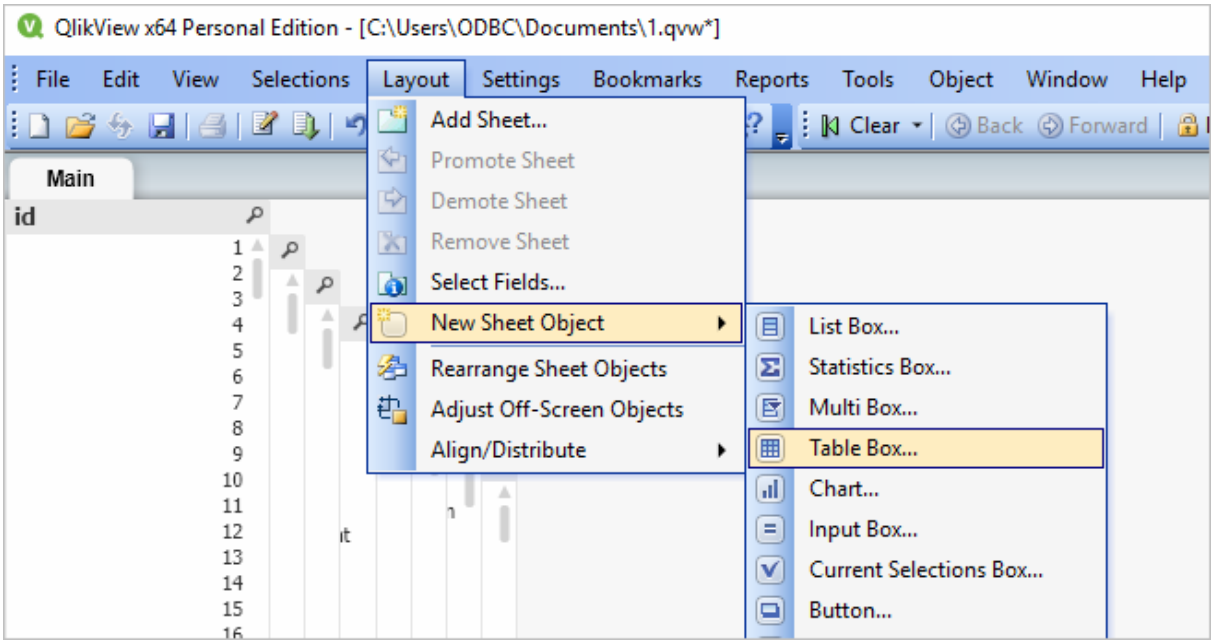


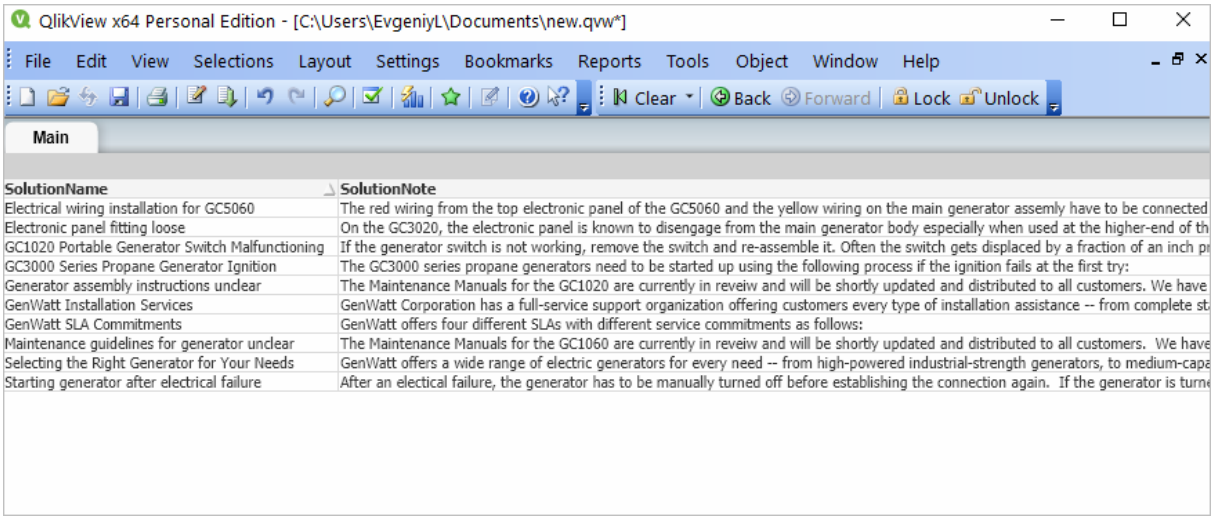


4. Alternatively, you can click **Select**, and QlikView will show you the database structure window where you can compose a SELECT statement for the data to be fetched. You can choose a different database from the database drop-down list. Select the necessary tables and fields. You can retrieve date from multiple tables and fields by selecting them and clicking **Add**. When you are ready with your SELECT statement, click **OK**. You will get back to the main script editor with your SQL statement. Press **F5** to execute the script and select the fields to be displayed in QlikView.



5. Once the data has been fetched, you can choose a table layout to present the data in a table. Choose **Layout > New Sheet Object > Table Box**. Select the fields to be added to the tablebox and click **OK**.





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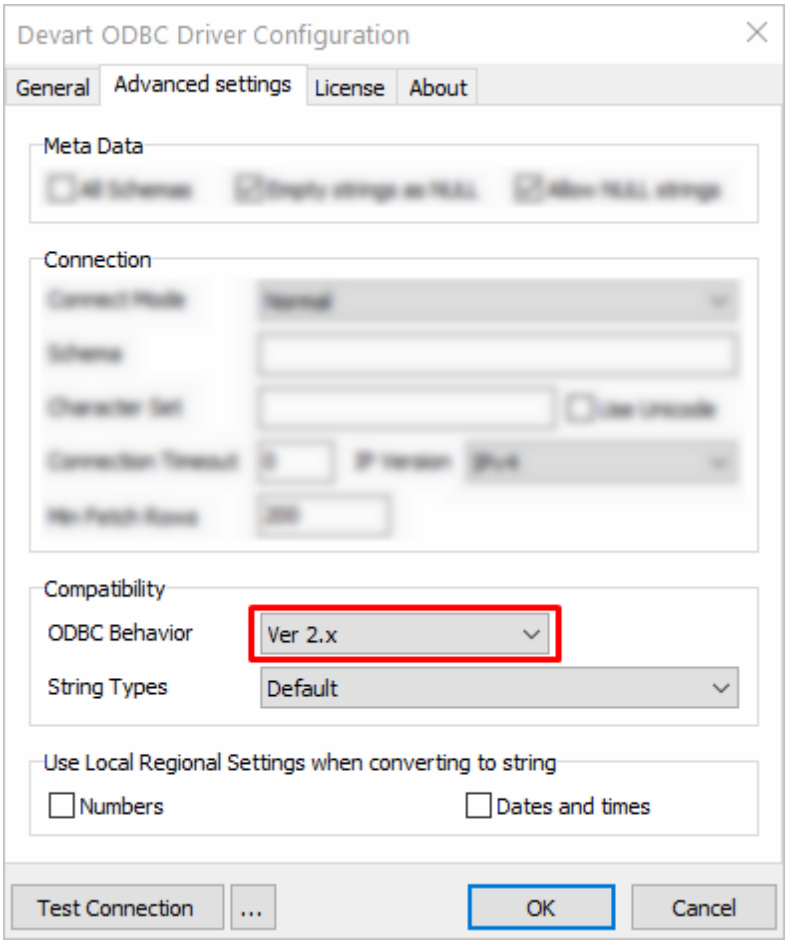
4.12 Using in SSIS

SQL Server Integration Services (SSIS) is a component of SQL Server that is designed to perform various data migration tasks. When using Devart ODBC Driver for Salesforce as a translation layer between the data source and SSIS, the driver and SSIS communicate via Microsoft ODBC version 3.x.

Note that when you extract data from an ODBC data source using the `SQLExecDirect` function, an issue may occur: SSIS expects the ODBC 2.x behavior, while the ODBC driver continues to fetch data from a data source via ODBC version 3.x. To prevent any issues when using SQLExecDirect, you should force the ODBC 2.x behavior in the DSN settings: open the `Advanced Settings` tab and select `Ver 2.x` from the `ODBC Behavior` dropdown.



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4.13 Using in Tableau

Importing Salesforce Data Into Tableau Through an ODBC Connection

This article explains to establish and ODBC connection to Salesforce from Tableau Desktop. Tableau is a data visualization tool that allows you to pull in raw data, perform analysis on it, and create meaningful reports to get actionable insights. With Tableau Desktop and our suite of ODBC drivers, you can connect to various relational and non-relational databases, both cloud and on-premise.

1. Run Tableau Desktop.

2. On the start page, select **More...** in the **Connect** pane.
3. Choose **Other Databases (ODBC)**.
4. Expand the **DSN** drop-down list and select the DSN that you have created and configured for Salesforce. Alternatively, if you have not created a DSN, you can choose the **Driver** option and select Devart ODBC Driver for Salesforce from the drop-down.
5. Click **Connect**.
6. After a successful connection, click **Sign in**.
7. Select the needed database and schema in Salesforce.
8. You should see the list of all tables you have access to in the connected data source.
9. Drag-and-drop the table name to the area where it says **Drag tables here** to retrieve the data, or click **New Custom SQL** to write a query that will select only specific data from the table.
10. Hit **Update Now** to retrieve and display the data.

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