

ODBC Driver for Marketo: Setup Guide



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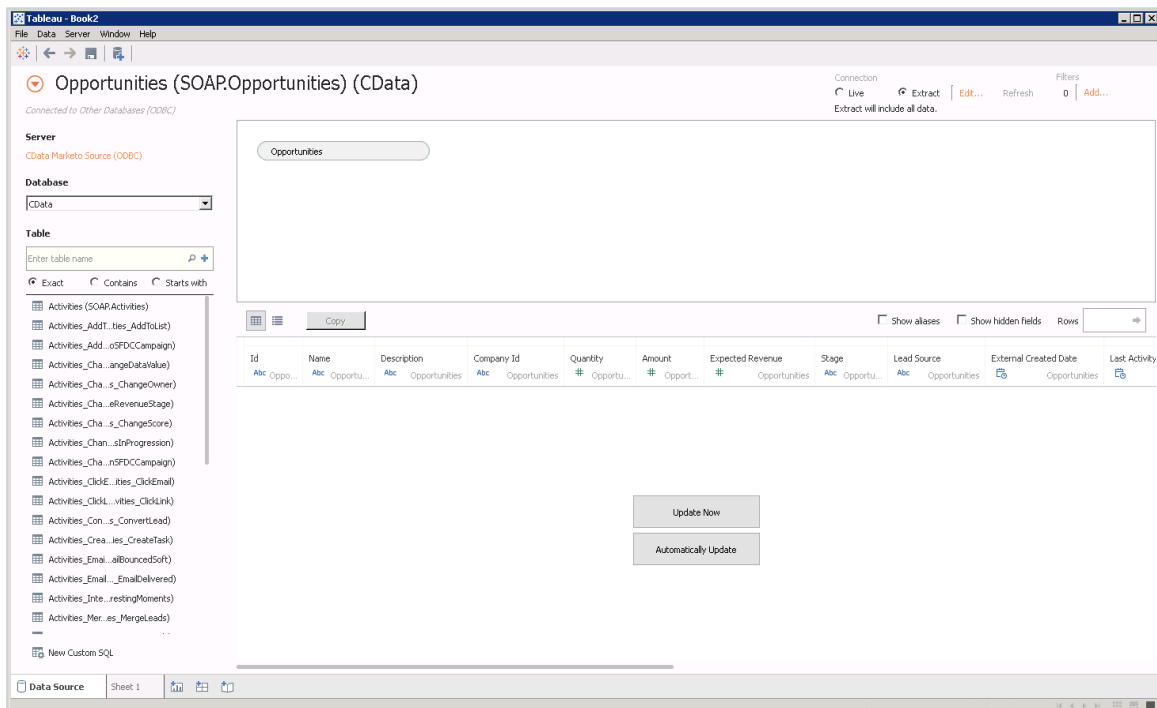
Follow the steps below to create Tableau dashboards based on Marketo Opportunities that you can refresh on demand.

Add Marketo Data to a Dashboard

Follow the steps below to create real-time data visualizations of Marketo activities:

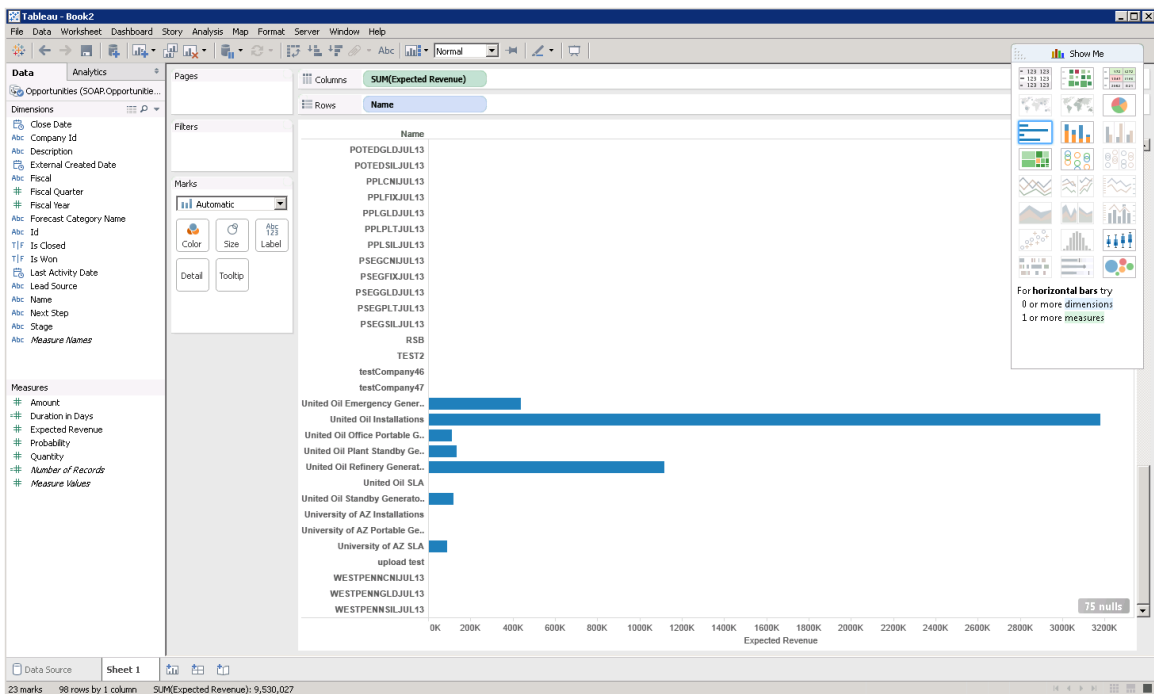
1. Specify connection properties in a DSN (data source name). You can use the Microsoft ODBC Data Source Administrator to create and configure ODBC DSNs.

See the Getting Started chapter in the help documentation for a guide to setting the required properties in the Microsoft ODBC Data Source Administrator.
2. In Tableau, click Connect to Data -> More Servers -> Other Databases (ODBC). Select the CData Data Source Name (DSN) and click Connect.
3. In the Database menu, select CData.
4. In the Table box, enter a table name or click New Custom SQL to enter an SQL query.
5. Drag the Opportunities table onto the join area. A connection to a single table.



6. In the Connection section, select the Extract option, so you are free to use any of the data visualizations in Tableau. The Marketo API surfaces all of your Marketo data but has limited search and summary capabilities. In the extract scenario, the driver is used for the initial import and for on-demand refreshes.
7. Click the tab for your worksheet. Columns are listed as Dimensions and Measures, depending on the data type.
8. Drop a column in the Dimensions pane onto the dashboard.
9. Drag a column in the Measures field onto the buttons on the Marks card.
10. On the Marks card, select Bar in the menu.

To refresh the data visualization, click Data -> Opportunities -> Extract -> Refresh.



Next Steps

You can find more guides to working with Marketo data in ODBC in the CData knowledge base (KB) and help documentation. Free trials and free support are available.

Download the Driver

To get started working with live Marketo data, download a free trial.

<http://www.cdata.com/drivers/marketo/download/>

Driver Technology Documentation

The driver help documentation includes resources to help you connect to Marketo and use the driver's interfaces. <http://cdn.cdata.com/help/DKA/odbc/>

Integration Tool Support

The CData knowledge base includes guides to using Marketo from ODBC applications.

<http://www.cdata.com/kb/?tab=prod&id=marketo&tech=odbc>

How to Contact CData Support

If you do not find a guide for your application in the knowledge base or have questions during your trial, use the support form. <http://www.cdata.com/support/submit.aspx>

For more information on CData support options, see the Support Options page.

<http://www.cdata.com/support/>