

A complete enterprise guide for your Fivetran free trial

A STEP-BY-STEP GUIDE TO HELP YOU RUN A
SUCCESSFUL FREE TRIAL

Table of contents

Introduction	1
Getting started	1
Maximize your trial	8
Conclusion	17
FAQs	18
Next steps and resources	20

Introduction

Welcome and congrats! You're on your way to modernizing and automating your data stack. By the end of your trial, you will have:

1. Centralized valuable information that exists across disparate sources into your destination(s),
2. Enabled analysts and stakeholders to draw insights from accurate, comprehensive data they can trust,
3. Experienced the magic of automated schema migration, saving you the maintenance burden of managing pipelines.

This guide follows the footsteps of some of our most successful customers and will help you make the most of your free trial. Reference this guide as you navigate our platform, add your first connection (instance of a connector), connect your databases, transform your data and more.

Getting started

We believe the best way to evaluate the power of automated data movement is to try it yourself! You can trial the full gamut of Fivetran's connectors and features free for 14 days - no payment required up front. This means you can connect all of your sources, risk-free, and get a cost estimate based on your usage before making any commitments.

How do I sign up for a free Fivetran trial and make the most of it?

Signing up is easy, but before signing up, we recommend planning out [which sources you want to connect](#). For some sources, you may need to invite your colleagues who have the required administrative permissions to configure the source connection, allowing Fivetran access and networking/security approval. For destinations, you may need to collaborate with your destination admin to ensure you will have access to your desired cloud based destination. Once you've decided which sources you want to connect during your trial, go ahead and follow the steps below!

Sign-up and setup steps

1. Sign up for a trial via fivetran.com/signup.

A. After verifying your email and logging in, you will be prompted to set up your first connection. Fivetran has 700+ connectors. [See whether Fivetran supports your data sources](#). If you do not see your data sources, you can still load your data with [our connector SDK](#) or [request a Lite connector](#) by contacting sales@fivetran.com.

Fivetran also has a By Request program for customers to request a Lite Connector for SaaS applications that are currently unavailable. If the source app is a good candidate, customers can partner with Fivetran to build a new connector in 30 days.

B. To add a connection, you will need to authorize credentials for the source. If you need help from a teammate, you can add them here.

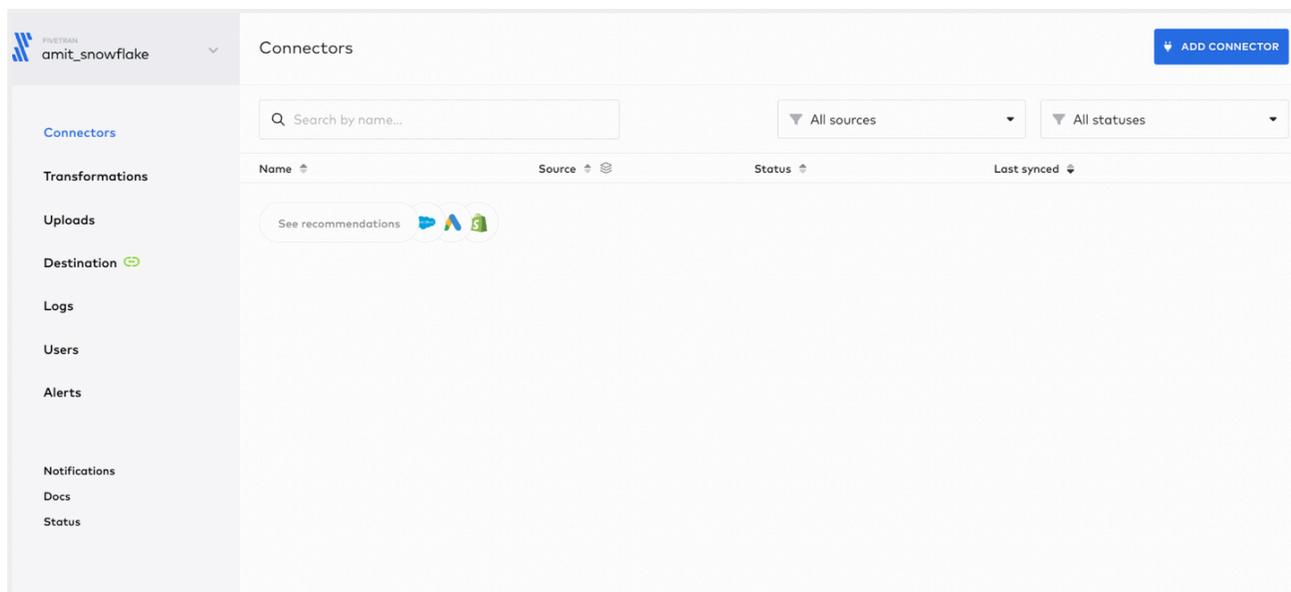
C. For more information about our connectors and setup process, check out our [documentation](#) page

2. Then, you'll need to add at least one destination. After all, data needs to land somewhere! During this time you can set up your residency requirements.

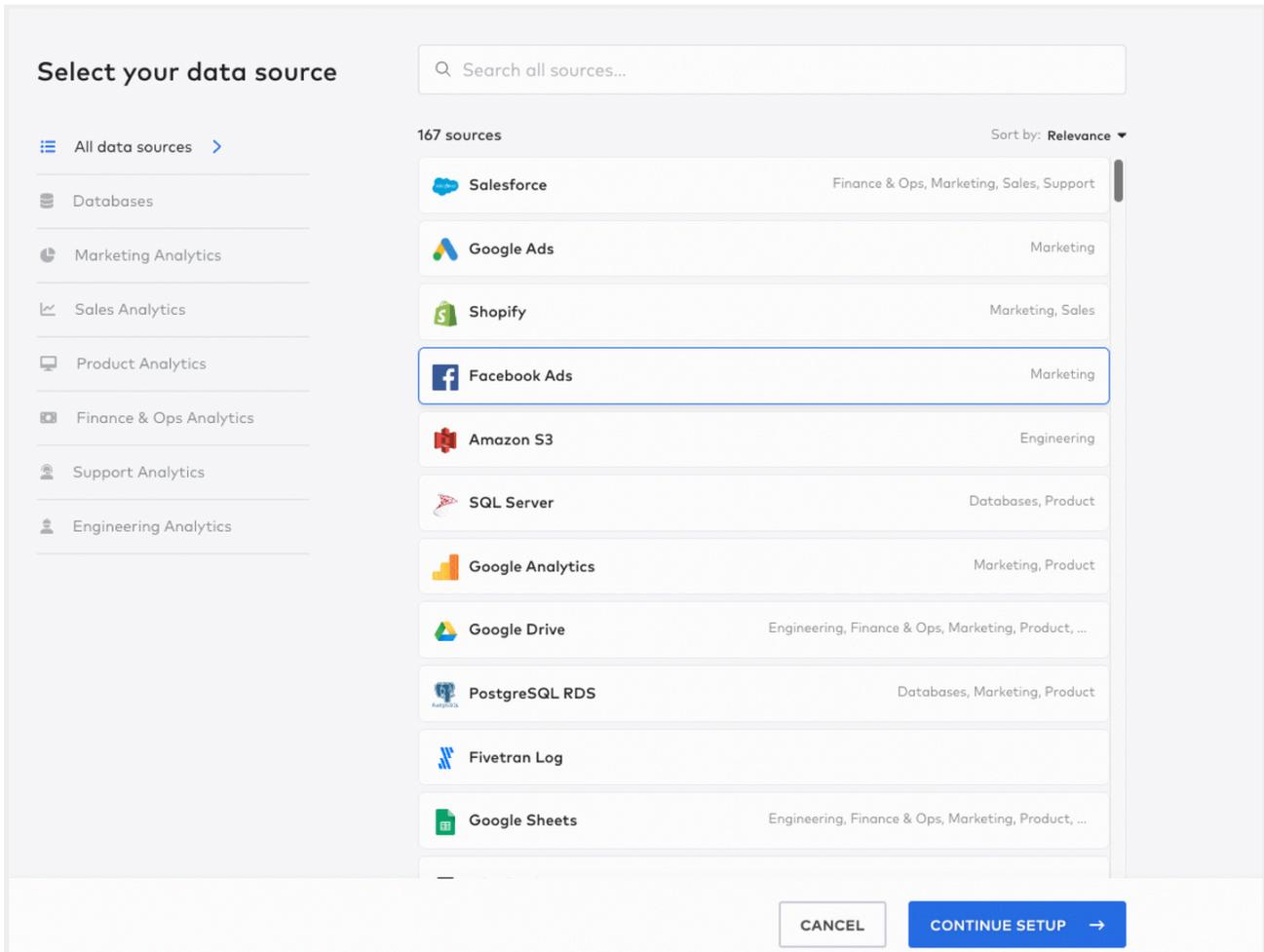
A. Fivetran supports cloud data warehouses, databases, online data platforms and data lakes as destinations. [Check out the full list of supported destinations.](#)

B. No destination? No problem! Use our [Fivetran-managed BigQuery destination](#), free with your trial. If you're evaluating destinations, compare the price, performance and features [here](#).

3. After setting up your connection and destination, select which tables you would like to sync and how often Fivetran should check for incremental updates. You can also choose if there are any columns you want to block or hash to prevent sensitive data, like personally identifiable information (PII), from being synced by Fivetran.



4. Once the first initial sync completes for at least one connection, your free trial will begin! Therefore, to make the most out of your free 14-days and to get an accurate pricing estimate based on your usage, we recommend adding all of your sources up front before starting your initial sync(s).



Learn about our pre-built connectors

Fivetran offers many types of connectors that you can ingest data from: applications, databases, files, events, cloud data warehouses, and functions.

APPLICATIONS

Application connectors sync data from your company's software services. Fivetran extracts the underlying data from your existing applications using an application programming interface (API) and centralizes it all in your cloud-based destination. We also normalize JSON data and provide entity-relationship diagrams (ERDs) so that your team can quickly understand relationships with primary and foreign keys. From end-to-end encryption to user-friendly features, such as blocking or hashing sensitive fields, we're built to handle the most stringent compliance and security protocols.

DATABASES

Connect to your databases quickly and securely with one of our supported connection methods:

- [Safelist Fivetran's IP](#) – the fastest and easiest method to connect your database to Fivetran.
- [SSH tunnel](#) – set up a tunnel connection for Fivetran to access your database port as an additional security layer.
- [Reverse SSH tunnel](#) – if you can't provide direct port access, a Fivetran tunnel server can be set up to listen for incoming traffic from your IP.
- [Private Link](#) - Leverage native AWS and Azure functionality to avoid any data traversing over the public internet. Contact your sales representative to trial this feature on our Business Critical plan.
- [VPN](#) - Contact your sales representative to learn more.

Fivetran also offers multiple methods to efficiently replicate high volumes of data from your databases to your cloud destination:

- **Change data capture (CDC)** – Utilizing log-based CDC, Fivetran tracks all of your data changes and replicates them to your destination via a simple setup, efficient processes, and [sync failure handling](#).
- **Teleport Sync** – Fivetran supports log-free database replication with [Teleport Sync](#), using compressed snapshots to replicate data from supported sources to their destination with just a read-only user.
- **High Volume Agent** – Replicate large volumes of data in real time with Fivetran's [high-volume agent-based solution](#), currently available for [Db2 for i](#), [Oracle](#), [SQL Server](#), and [SAP ERP](#).

For more information on our other types of connectors, visit our [documentation](#).

The screenshot shows the Fivetran connector setup interface for Facebook Ads. The page is titled "Facebook Ads" and includes a "Setup Guide" section on the right. The main form area contains the following fields and options:

- Destination schema:** A text input field containing "facebook_ads". Below it, a note states: "Appears in your destination as facebook_ads and cannot be changed after you test the connector or save the form for later."
- Authentication Method:** Two radio button options:
 - Grant User Access**
For Most Facebook Ads Users
 - Use System User Token**
For Agencies
- AUTHORIZE** button: A blue button with the text "Click to authorize API".
- SAVE & TEST** button: A white button with a grey border.

The right-hand "Setup Guide" section includes a "Prerequisites" list:

- * An active Facebook account with permission to access data from accounts you'd like to sync.
- * The [breakdowns](#) and [fields](#) you'd like to sync.

Below the prerequisites is a "Setup instructions" section with two numbered steps:

- 1 In the [connector setup form](#) enter the **Destination schema** name of your choice.
- 2 Select the **Authentication Method** you want to use:
 - * Select **Grant User Access** to authorize through OAuth. Click **Authorize**, to authorize Facebook to log in through OAuth.
 - * Select **Use System User Token** to authorize through **System User Token**. You must provide the `ads_read` and `ads_management` permissions while generating the system user token. Provide the `business_management` permission if you want to access and sync business details.

A **NOTE** at the bottom of the setup instructions states: "The app for which you generated the system token must have the Standard or Advanced [access level](#). If the app has the default: No Access access level, then the system user tokens generated for these apps is not able to query the Ads API. Note that requirements for each access level are managed by a third party and can be changed at any time. If you see sudden access level errors after the connector setup, check your [App review status](#) and make sure..."

FIVETRAN
amit_snowflake

Amit Kapadia
Logout · Support · Privacy

Facebook Ads

Follow the setup guide on the right to connect your data source to Fivetran. If you need help accessing the source system, [invite a teammate](#) to complete this step.

RE-AUTHORIZE CONNECTION Authentication Succeeded

Sync Mode

Sync All Accounts
Automatically sync all existing and new accounts

Sync Specific Accounts
Select accounts for sync

No Tables [+ Add Table](#)

Historical Sync Timeframe: SIX

Number of months of reporting data you'd like to include in your initial sync. This cannot be modified once connection is created.
NOTE: The more months of reporting data you sync, the longer your initial sync will take.

Sync all metadata

When this parameter is set to 'false', metadata will not be synchronised

SAVE & TEST

Setup Guide

Updated July 11, 2022 [Edit on GitHub](#)

Follow our setup guide to connect Facebook Ads to Fivetran.

Prerequisites

To connect Facebook Ads to Fivetran, you need:

- An active Facebook account with permission to access data from accounts you'd like to sync.
- The **breakdowns** and **fields** you'd like to sync.

Setup instructions

- In the **connector setup form** enter the **Destination schema** name of your choice.
- Select the **Authentication Method** you want to use:
 - Select **Grant User Access** to authorize through OAuth. Click **Authorize**, to authorize Facebook to log in through OAuth.
 - Select **Use System User Token** to authorize through **System User Token**. You must provide the **ads_read** and **ads_management** permissions while generating the system user token. Provide the **business_management** permission if you want to access and sync business details.

NOTE: The app for which you generated the system token must have the Standard or Advanced **access level**. If the app has the default No Access access level, then the system user tokens generated for these apps is not able to query the Ads API. Note that requirements for each access level are managed

FIVETRAN
amit_snowflake

Amit Kapadia
Logout · Support · Privacy

Facebook Ads

Connection tests:

- ✓ Validate custom/prebuilt report names
- ✓ Validate access for Ad accounts
- ✓ Validating action field is selected for action breakdowns
- ✓ Validating selection of proper combination of fields & breakdowns
- ✓ Validating restrictions for off-Facebook action metrics
- ✓ Validating retention of sync level

✓ All connection tests passed!

BACK **CONTINUE**

Maximize your trial

Your free trial officially begins when the first, initial sync for at least one connection completes. Initial syncs depend on the source system, but can be as quick as a few minutes or as slow as a few days for larger sources or sources with limited API calls. Don't worry, you'll get an email once the sync completes.

As your data is syncing, check the “Logs” tab to see how many rows we’ve replicated in each batch, how many tables we’ve fully synced and how many we have left to go. We also recommend setting up the Fivetran Platform Connector. Don't worry, this connector is completely free and does not count towards your usage. This will write all of your Fivetran logs into your cloud data warehouse, making searching through your logs very easy. Learn more about Fivetran support for logs and the [Fivetran Platform Connector](#) below. Then, go check it out in your destination!

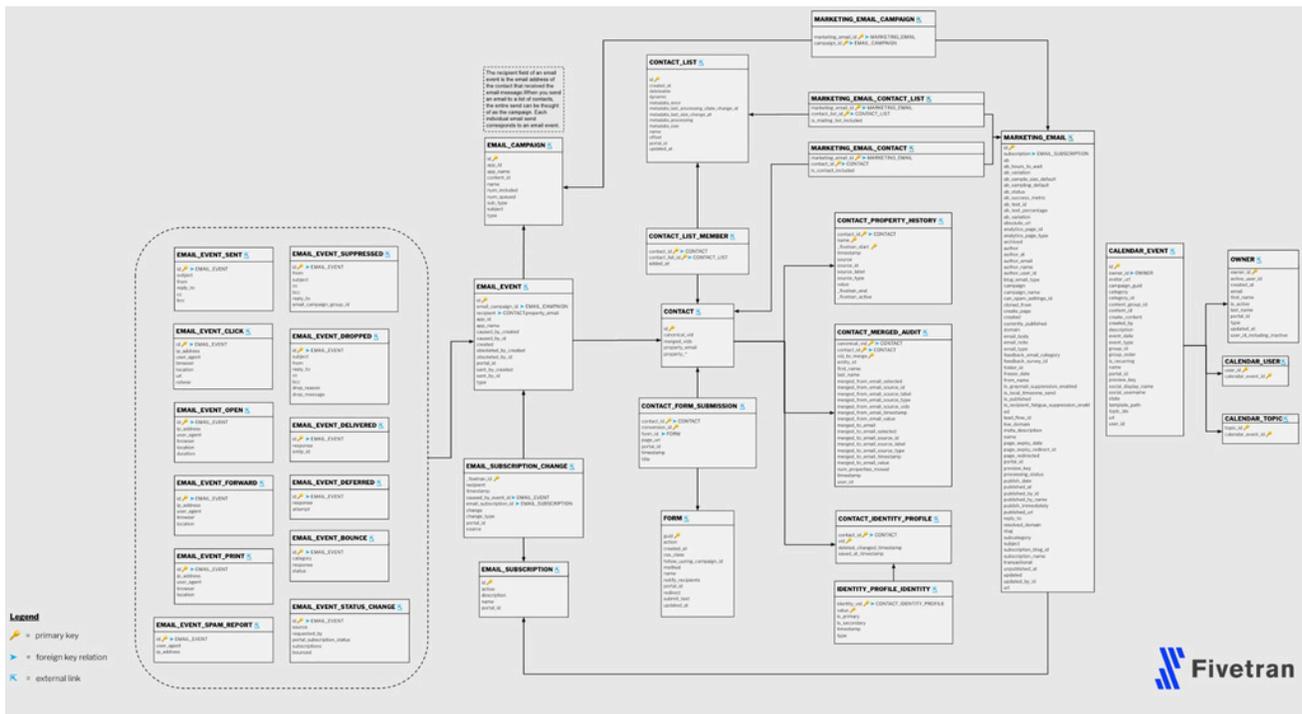
The screenshot shows the Fivetran interface for a connection named 'facebook_ads' (source: Facebook Ads, destination: snowflake). The interface includes a sidebar with navigation options: Connectors, Transformations, Uploads, Destination, Logs, Users, Alerts, Notifications, Docs, and Status. The main content area shows the connection status as 'Connected' and a message: 'Your data is ready to sync! Your connector is ready to sync source data to your destination! Syncing may take time depending on how large your data set is.' A 'Start Initial Sync' button is visible. Below this is a 'Sync History' section with a timeline from 00:00 PM to 6:00 PM, showing a 'PAUSED' status. At the bottom, there are three panels: Alerts (No alerts. Good job!), User Actions (Connection Manually Tested by Amit Kapadia, August 23, 2022 3:11 PM; Connection Created by Amit Kapadia, August 23, 2022 3:10 PM), and Stats (Nothing to show here yet, check back later).

Learn about how Fivetran works

Entity-relationship diagram (ERD)

After syncing your data, you may be wondering what API objects are loading into which tables. Our ERDs, available for many of our application connectors, are visual representations of schemas that illustrate the interrelations between tables, including primary and foreign key constraints. With ERDs you can:

- Visualize how tables are related to each other.
- Understand what fields (columns) are associated with each table.
- Understand the table definitions from the source application (via the links in the ERD).



(Example of Hubspot ERD)

Automated schema migrations

Fivetran automatically handles schema creation and drift in each of our [supported destinations](#). Using an internal representation of your tables, Fivetran identifies any schema changes in the source. When a schema change is detected, the change will automatically be pushed to your destination. If a column is removed, Fivetran will maintain the column in the destination and begin writing “null” in the field, which prevents breaking downstream reports.

Idempotency

Fivetran is [self-healing](#). For example, if your destination incurs an outage, Fivetran goes through a series of automated steps to try to reconnect to the destination. Once we are able to reconnect, we will automatically identify and sync all data that has since changed. This prevents duplication and loss of data.

Complete your ELT pipeline with Fivetran Transformations

You can make up to 5,000 model runs for free with [Fivetran Transformations](#). We offer a [library of pre-built data models](#) for our top connectors that transform your data and create analytics-ready data sets, reallocating your time from modeling to insight generation. These pre-built models produce comprehensible tables that power your reports, visualizations, and dashboards. We automatically orchestrate your data model runs immediately upon sync completion, saving your team time and computational costs.

Example: You use Fivetran's connectors to access the data for your marketing efforts across multiple channels - Facebook, Twitter, LinkedIn, Pinterest and Google. But, that data lives in siloed tables in your warehouse. You still need to harmonize the data to understand your return on ad spend and identify where you should reallocate ad spend to maximize your budget. Utilize our [Ad Reporting data model](#) to aggregate your disparate data into one cohesive foundation. Fivetran Transformations will also orchestrate the data model run immediately when your connections finish loading the raw data in your warehouse. This increases your efficiency, saves you time, and helps your team focus on insight generation.

Add our free Fivetran Platform Connector

The Fivetran Platform Connector is a free connector that delivers your logs and account metadata to a schema in your destination. You can query the data in the different destination tables to monitor different metrics such as connection performance and usage, giving you greater transparency into Fivetran activities. [Learn more about our Fivetran Platform Connector.](#)

In addition, the Fivetran log tab for each of your connections also provides an internal view of the operations happening with each of your connectors. It generates structured log events from connections, dashboard user actions, and Fivetran API calls.

Role-based access control

The [Fivetran RBAC model](#) provides granular user role permission management to ensure that users can only access resources with the minimal permissions needed. Our model also provides a set of user roles to grant or deny access to different resources within the Fivetran account and manage permissions for related areas. The model also allows teams to easily manage permissions for many users across the destinations within the account and connections within the destinations. Have specific access requirements? You can also create custom roles to meet your authorization requirements.

Metadata API

The Fivetran Metadata API shares information about the data Fivetran is syncing with your data catalog. Once your core data team knows what is flowing in, they can apply internal governance policies, like how PII and sensitive data should be handled. This helps your organization comply with data regulations, as well as satisfy internal legal and security requirements. Learn more in our [documentation](#) and [datasheet](#).

Take advantage of Enterprise Plan features

Our free trial is on the Enterprise Plan which means you have access to many valuable features. Here's what our customers love the most:

- **Faster sync times** – Sync data as frequently as every [minute](#) to work with near real-time data.
- **Role-based access controls** – Restrict user access to specific connections, [set permissions](#) for teams, and [create custom roles](#).
- **Flexible connection methods** – Connect your way with [reverse SSH and VPN tunnels](#).
- **Cloud provider selection** – [Choose the cloud provider](#) (GCP, AWS or Azure) you want to run Fivetran on.
- **External logging** – [Send logs](#) to AWS CloudWatch, DataDog, Google Cloud Logging, Azure Log Analytics, Splunk.

Looking to ramp up your data security? Ask your account representative to trial Business Critical to unlock:

- **Private Link** - Avoid exposing data over the public internet for a secure connection to source and destination.
- **PCI DSS compliance** - Securely handle customer credit card and payments data in Fivetran.
- **Region selection** - Deploy Fivetran within specific regions to meet data residency requirements.
- **Customer-managed keys** - Manage master keys used for data and credentials encryption with the ability to restrict access at any time.

Understand your usage and pricing estimate

Fivetran pricing is consumption-based

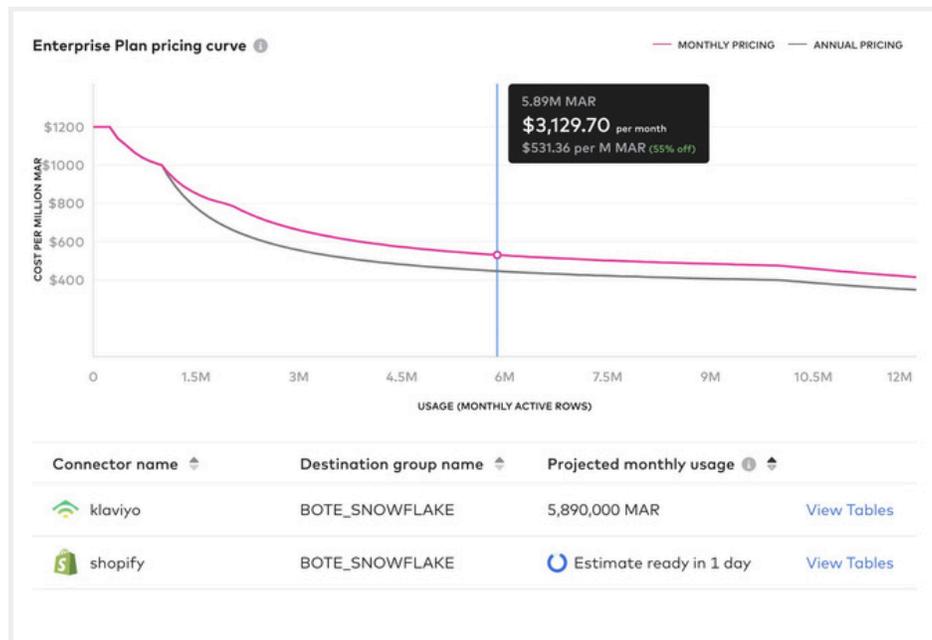
Fivetran charges for [monthly active rows \(MAR\)](#), which are rows added, changed, or deleted in your destination via our connectors, apart from your initial sync. They are only counted once per month per unique primary key. Here's what you need to know about our pricing:

- Our pricing model has built-in volume discounting - so the more you use, the less you pay per row per connection.
- Historical syncs are always free - whether it's for a new connector or a new table.
- You can also trigger resyncs, completely free.
- If you want to try a connector after your free trial ends, we give you [14-days of free usage](#).

When and where you can view your usage estimate

Around seven days into your trial, you'll get an initial usage and pricing estimate in the [billing and usage](#) pages in your account. Each connection needs seven days of incremental data for an accurate estimate, so if you added connections later in your trial, your total estimate will update after each connection estimate is complete.

Hint: This is a good reminder to add all of your connections the first couple of days of your trial to get the most accurate pricing estimate.



Purchasing Fivetran

We have a number of payment options and pricing plans, so you can choose what's right for your business.

- **Free Plan:** [Select our free plan](#) and skip the credit card to continue using Fivetran completely free for volumes below 200,000 monthly rows.
- **Pay-as-you-go:** Enter a credit card on your [billing page](#) to pay for usage month-to-month at list price for maximum flexibility.
- **Annual contracts (\$12K minimum):** Benefit from built-in discounting with an annual commitment. [See the benefits of an annual plan.](#)
- **Marketplaces (AWS, GCP, Azure, Snowflake, Databricks):** Purchase Fivetran via a partner marketplace.
- **Flexible pricing plans:** [Compare our pricing plans](#) and choose what level of speed, connector access, and security is right for your business.

With estimates based on your usage and flexible payment options and plans, you can make an informed decision before choosing the right plan and payment option for your business at the end of your trial.

Need help? Your account executive will work with you to get a more accurate estimation of your cost. If you haven't connected with sales yet, you can contact them at sales@fivetran.com.

Conclusion

You've made it! We hope you've had a taste of the modern data stack, and how automating pipelines instead of building them unlocks savings, scale, and timely, reliable data. But we realize this is only the beginning. Now that you have a single source of truth, you may want to create those self-service dashboards that have been on the back burner for months, connect additional sources, or run complex analyses blending data across marketing, product, and sales.

Get inspired by what our customers's data teams have achieved with Fivetran's automated pipelines:

- [JetBlue](#) developed a comprehensive data strategy that has given analysts and leaders access to a variety of datasets that span across many workgroups, enabling them to make better decisions.
- [DocuSign](#) offloaded the time-intensive process of creating and managing pipelines from engineering resources, so they can focus on mission critical projects.
- [Canva](#) has saved over \$200,000 in engineering costs while building a 360-degree view of customers across Canva and third-party platforms.
- [Square's](#) marketing team can integrate data from all of their global partners quickly and safely.

FAQs

How does Fivetran handle schema creation and migration?

Fivetran automatically handles schema creation and drift in each of our [supported destinations](#). This eliminates broken pipelines and manual intervention due to a schema update. Using an internal representation of your tables, Fivetran identifies any schema changes in the source. When a schema change is detected, the change will automatically be pushed to your destination. The data sync occurs in one direction so only schema changes within the source will be applied to the destination schema.

What does Fivetran do when there are changes to the APIs?

Data pipelines rely on API calls to the data sources to extract and replicate data to your destination. When an application data source changes its APIs, which is not uncommon, the data pipeline has to be changed accordingly. Instead of paying for engineers to make the updates, automate this process. Fivetran has a team of dedicated engineers working on data pipelines to provide support for API maintenance and ensuring they are up to date, so that your engineering team can focus on more valuable tasks.

How do I track changes occurring to my applications data?

Fivetran captures deletes, inserts, and updates from the source using change data capture. This feature scans for what data was changed previously so when your data syncs next, you are only charged for the most recent changes. Any changes made to the data source will be reflected in the data warehouse.

How do I protect PII when syncing data?

The Fivetran platform provides column blocking and column hashing features to help protect your PII when syncing data. The column blocking feature gives you the ability to block specific columns from replicating to your warehouse.

Once the data is hashed with the column hashing feature, it cannot be returned to its previous state. As a result, you can use column hashing to anonymize warehouse data and keep your organization compliant with GDPR. Anonymizing data is also helpful from an analytical perspective. Because the hashed result is the same across data sources, you can still join on key fields, such as email addresses, without the risk of exposing PII. It's as simple as going into the connector detail view in your dashboard and selecting the columns you want to hash

How do I validate my synced data?

After syncing your data, you may want to validate that the data was ingested accurately. Although there is currently no one-size fits all solution, are a few options:

- Spot check a record on the source side to see if it matches on the destination/target side. It's important to note that objects in a SaaS application are not always represented by a single table.
- Another option is to run `SELECT COUNT(*)` in the source and destination to validate row counts. The caveat here is that hard deletes in the source might inflate record counts in the destination so you will need to filter out non-active records via the `fivetran_deleted` system column.

What security standards does Fivetran adhere to?

Committed to security and focused on keeping your data safe, Fivetran adheres to industry-leading security protocols while connecting, replicating, and loading data from each data source. No data is retained in Fivetran after it is successfully written to the destination besides the items on the [security exception page](#). Fivetran utilizes cloud service providers with an extensive list of compliance and regulatory assurances such as SOC 1/2, PCI-DSS, and ISO27001. Reference the [security documentation](#) to understand more about our security protocols and procedures. To meet [data residency requirements](#), Fivetran can be run in the user's selected geographic region based on preferences and plan tier.

What are some of the potential errors that I may encounter?

Fivetran strives to make your experience as easy and hassle-free as possible. Unfortunately, there are times you may experience an error as part of the setup, initial sync, or subsequent sync. Subsequent syncs are incremental for performance optimization and only modify or add changed data from the source into the destination. Fivetran utilizes the sync history chart to visualize sync status and monitor sync performance.

Common errors include the following scenarios:

- Data source connection problem: Your data source is not connected correctly (for example, the setup tests in your Fivetran dashboard failed).
- Data source configuration problem: Your data source is not configured correctly for Fivetran to use (for example, the Fivetran user does not have adequate permissions to access your data).
- Data source file problem: Your source files are not configured correctly (for example, some of your tables have null primary keys).
- Destination connection problem: Your destination is not connected correctly (for example, you did not finish your destination set up in the Fivetran dashboard).
- Unknown connector problem: Your connector syncs are failing, but we do not know the breaking issue. We generate this unknown error after three failed syncs in a row.

But don't worry, your trial is fully supported. If you experience any hiccups along the way, visit the [support portal](#) or contact your Sales Engineer who will help you work through the errors.

Next steps and resources

If you're considering Fivetran for your ELT needs, sign up for a [free trial](#) today.

Customer support

Our customer support team is here to help you throughout your data journey with Fivetran.

- Customer success managers (CSM) are assigned to you and will help relay potential questions for the engineering team.
- Sales engineers (SE) are at the front-end of the sales cycle and are here to guide you with the setup process.
- Solutions architects (SA) are technical subject matter experts that ensure customers continue to unlock and add value with their data and can help with questions post setup.
- To further improve your experience, we also have chat boxes on the website and a 24/7 support team to help should you incur any major issues.

Do you think you'll need extra help getting set up, or navigating your complex data landscape? Speak to your account representative about Professional Services or leveraging a Fivetran Residency Solution Architect to support your team.

Additional resources (webpages, datasheets, etc.)

- [Marketing Cheat Sheet](#), [Sales Cheat Sheet](#), [Finance Cheat Sheet](#)
- [Documentation](#)
- [General resources](#)
- [What is the modern data stack?](#)
- [Security whitepaper](#)
- [6 best practices for cloud data integration](#)
- [The Chief Data Officer's guide to generating impact](#)
- [Gain real-time access to SAP ERP data with high-volume data replication](#)



Fivetran automates data movement out of, into, and across cloud data platforms. We automate the most time-consuming parts of the ELT process from extracts to schema drift handling to transformations, so data engineers can focus on higher-impact projects with total pipeline peace of mind. With 99.9% uptime and self-healing pipelines, Fivetran enables hundreds of leading brands across the globe, including Autodesk, Conagra Brands, JetBlue, Lionsgate, Morgan Stanley, and Ziff Davis, to accelerate data-driven decisions and drive business growth. Fivetran is headquartered in Oakland, California, with offices around the world.



For more info, visit [Fivetran.com](https://fivetran.com).

[Start your free trial](#)

©2025 Fivetran Inc.