

Scheduler

DBSync Cloud Replication facilitates Replication to be scheduled as per the requirement. Below section helps with the steps involved in Scheduling.

Log in to the DBSync replication portal

Sign in to the [DBSync Replication portal](#).

Fill the configuration details in global settings

Start DBSync Replication console to configure the proxy settings under the global settings option on the home page.

Follow these steps to configure a proxy global settings in DBSync replication portal.

1. Once, you have logged in then click to "**main menu**" in the **right hand top corner on the home page** of DBSync replication portal.
2. Next, enter the **required proxy credentials** in different text boxes like **proxy host, port, username and password** under the global settings section.
3. **Click on save changes button to save a global settings details.**

Figure:1

The screenshot shows the DBSync Cloud Replication & CDM interface. On the left, there's a dark sidebar with 'My Account' dropdown, 'Home' icon, and 'Settings' icon. The main header says 'DBSync Cloud Replication & CDM'. In the top right, there are 'Wiki', 'Log out', and a grid icon. Below the header, it says 'Global Settings' with a breadcrumb 'Home / Global Settings'. The central area has a title 'Global Settings' and four input fields: 'Proxy Host' (empty), 'Proxy Port' (empty), 'Proxy UserName' (empty), and 'Proxy Password' (empty). At the bottom right are 'Cancel' and 'Save changes' buttons.

Create a source application profile

Source application profile Includes Salesforce and Microsoft CRM. The source app profile is created within DBSync Replication platform.

Follow these steps to create a profile under source application like Salesforce and Microsoft CRM.

1. Click to "**add profile**" in the right hand-corner of the profiles section of DBSync replication portal.
2. Select, the required **source name application** from the **drop down menu** under the **product header**.
3. Next, **enter the name of the profile** like "**testprofile**" under the name section.
4. **Click on save changes button to create a new replication profile.**

Figure:2

Source application setup details

Start with source application setup details includes Salesforce and Microsoft CRM.

The source setup applications details required to configure your **Salesforce and Microsoft CRM** credentials like "*username*" and "*password*".

Follow these steps to configure your source application like Salesforce and Microsoft CRM.

1. Click to "**Salesforce and Microsoft CRM** setup tab" on the left hand corner in the profiles section of DBSync Replication portal.
2. Don't change the "**environment and soap end details**", all these details are pre-filled.
3. Next, enter the "**username**" and "**password**" credential for **Salesforce and Microsoft CRM**.

Figure:3

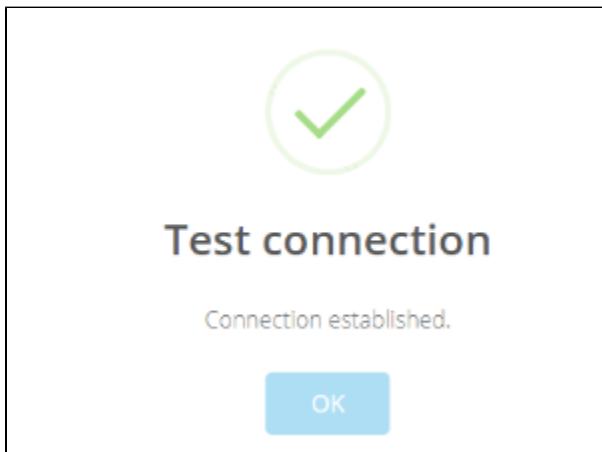
4. "**OR**", "**Other option for salesforce**" click on connect to **Salesforce (OAUTH)** to enter Salesforce login credentials like "*username*" and "*password*" to connect the salesforce application.

Figure:4

The screenshot shows the DBSync Cloud Replication & CDM application's configuration interface. On the left, a sidebar menu includes options like Home, Profile, Salesforce Setup, Database Setup, Advanced Settings, Objects, Export, Snapshots, Schedule Jobs, and Logs. The main panel is titled "Salesforce Details" and contains fields for "Environment" (set to "Production/Development"), "Soap Endpoint" (set to "https://login.salesforce.com"), "User Name", "Password", and a checkbox for "Use Bulk API". To the right, a separate browser window titled "Login | Salesforce - Google Chrome" displays the Salesforce login page with fields for "Username" and "Password", and a "Log In" button. Below the login form are links for "Forgot Your Password?" and "Use Custom Domain".

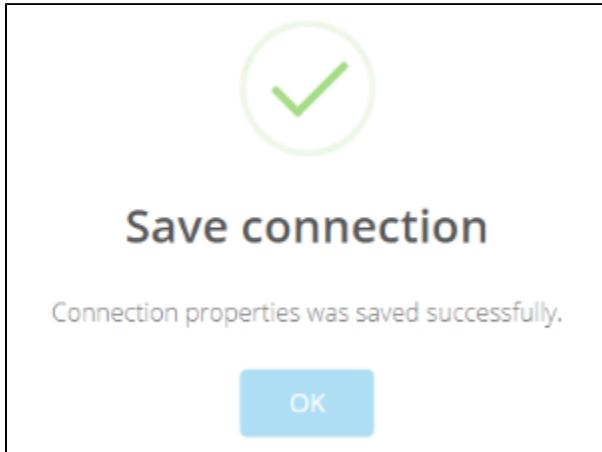
5. Click on **test connection button** to validate your source application login details.

Figure:5



6. Click on **save button to save your source apps login details**.

Figure:6



7. Once completed, click on **next button to proceed to database setup tab**.

Configure schedule jobs tab

Start with Scheduler Jobs tab, here users can schedule the sync using Scheduler Tab.

Follow these steps to schedule the sync using Scheduler tab with scheduler functionality like run commands options, Date, Month and year format settings and repeat Drop-down menu details to set the desired duration to sync the selected objects.

1. Click to "**scheduler jobs**" tab on the left hand corner in the Profiles section of DBSync replication portal.
2. Once, user has connected to source applications like Salesforce and Microsoft CRM then objects will get synced and user can directly select the required process from the command drop-down and configure the frequency of the sync by selecting a desired duration from the **Repeat drop-down menu**.
3. Next, "**start on**" option to select the **date, month and year** from the **drop-down menu** to get the objects synced for particular Date and Month format.
4. Create a task in the "**task section**" with all the details including **task name, action, command and start, date and time**.
5. Once the process is completed then click on **save button to proceed further**.

Figure: 7

The screenshot shows the DBSync Cloud Replication & CDM interface. On the left, there's a sidebar with 'My Account' and a navigation menu including 'Home', 'Profile' (which is currently selected), 'Salesforce Setup', 'Database Setup', 'Advanced Settings', 'Objects', 'Export', 'Schedule Jobs' (which is also selected), and 'Logs'. The main content area is titled 'Schedule Jobs'. It contains fields for 'Command' (set to 'Update Schema'), 'Starts On' (set to '12/12/2018'), 'Repeat' (set to 'No Repeat'), and a 'Save' button. Below this is a 'Tasks' section with a table header: 'Task Name', 'Repeat', 'Start Date Time', 'Next Fire Date Time', 'Command', and 'Actions'. The table is currently empty. At the top right of the main content area, there are links for 'Wiki', 'Log out', and a menu icon.