

Steps in Replication

DBSync Cloud Replication must be installed in your system. Step by step procedure for installation is shown in the topic [Installation](#).

Quick Start with DBSync Replication

Use DBSync Replication with different source apps (Salesforce/Microsoft CRM) to connect a database.

(Note: Source Apps includes Salesforce and Microsoft CRM Application)

The quickstart walks through how to create profile under different source applications like Salesforce and Microsoft CRM. The DBSync replication is offering you to connect the source apps like Salesforce and Microsoft CRM with different databases like MySQL, SQL Server, Oracle, DB2, PostgreSQL, Cassandra, AWS Redshift, Snowflake, Sybase, and MongoDB.

This quickstart shows you how to get started by creating a profile under source applications and how to replicate the data with the help of DBSync from source applications to different databases.

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 the 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 the details of a global setting**.

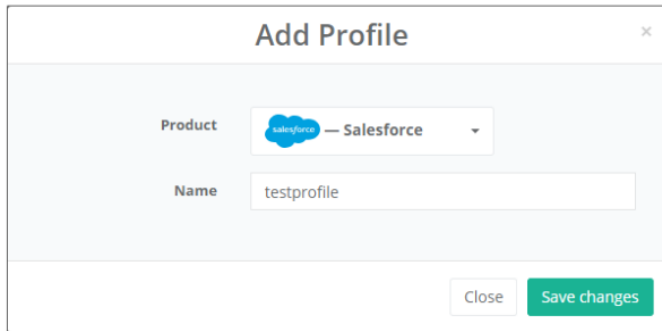
The screenshot displays the 'Global Settings' page in the DBSync Cloud Replication & CDM portal. The interface includes a dark sidebar on the left with navigation options: 'My Account', 'Home', and 'Settings' (which is highlighted). The main content area has a header 'Global Settings' and a breadcrumb 'Home / Global Settings'. Below this, there's a section titled 'Global Settings' containing four text input fields labeled 'Proxy Host', 'Proxy Port', 'Proxy UserName', and 'Proxy Password'. At the bottom right of this section, there are two buttons: 'Cancel' and 'Save changes'.

Create a source application profile

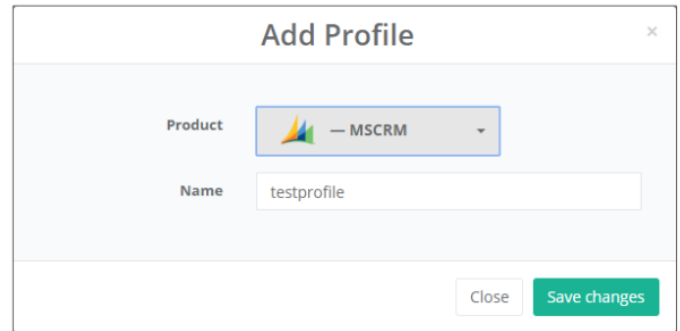
Source application profile Includes Salesforce and Microsoft CRM. The source app profile is created within the DBSync Replication platform.

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**.



The screenshot shows a modal window titled "Add Profile" with a close button (X) in the top right corner. Inside the modal, there is a "Product" dropdown menu with the Salesforce logo and the text "Salesforce". Below it is a "Name" text input field containing the text "testprofile". At the bottom right of the modal, there are two buttons: "Close" and "Save changes".



The screenshot shows a modal window titled "Add Profile" with a close button (X) in the top right corner. Inside the modal, there is a "Product" dropdown menu with the MSCRM logo and the text "MSCRM". Below it is a "Name" text input field containing the text "testprofile". At the bottom right of the modal, there are two buttons: "Close" and "Save changes".

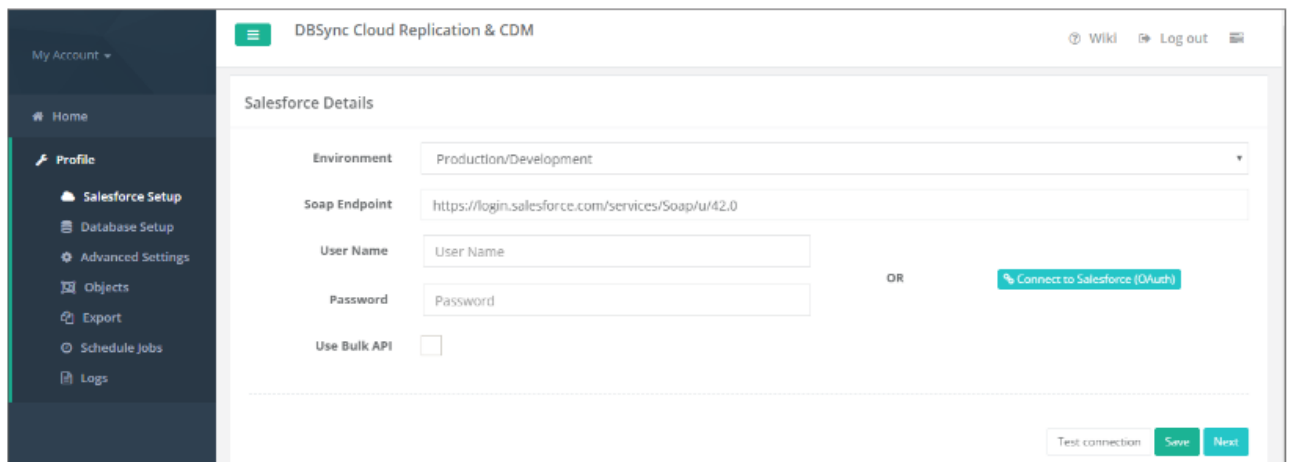
Source application setup details

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

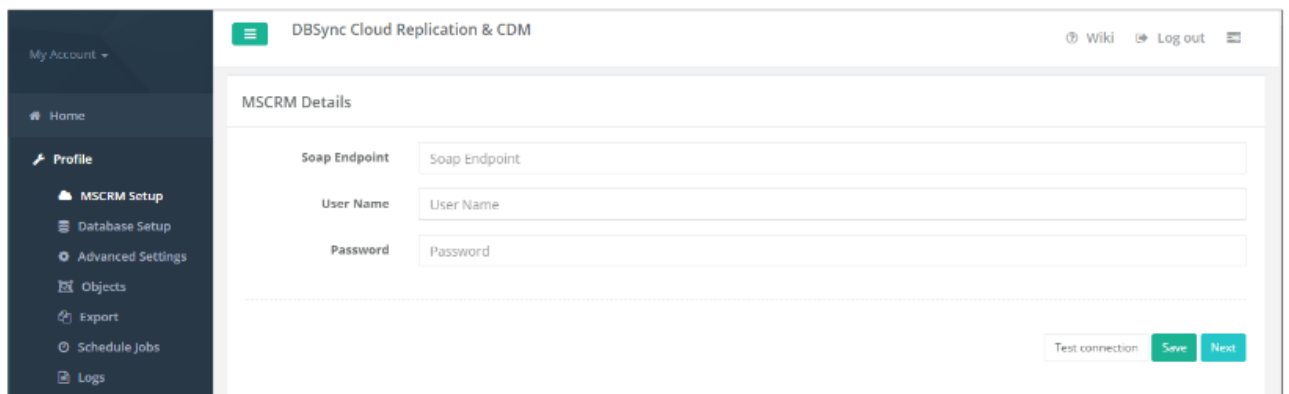
The source setup applications details required to configure your **Salesforce and Microsoft CRM** credentials like "**username**" and "**password**".

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**.



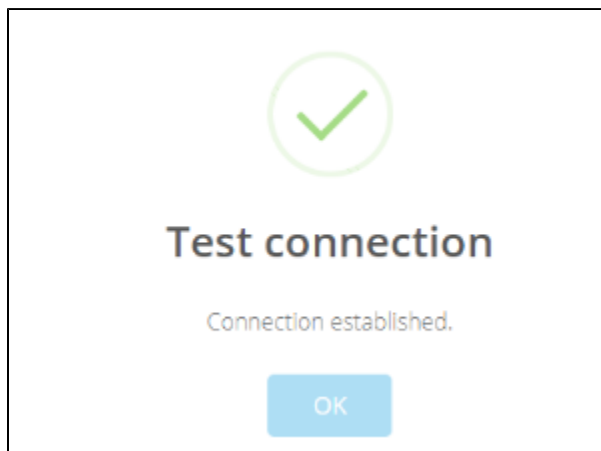
The screenshot shows the "Salesforce Details" setup page in the DBSync Cloud Replication & CDM portal. The page has a dark sidebar on the left with navigation links: "My Account", "Home", "Profile", "Salesforce Setup", "Database Setup", "Advanced Settings", "Objects", "Export", "Schedule Jobs", and "Logs". The main content area is titled "Salesforce Details" and contains the following fields: "Environment" (dropdown menu with "Production/Development" selected), "Soap Endpoint" (text input field with "https://login.salesforce.com/services/Soap/u/42.0"), "User Name" (text input field with "User Name"), "Password" (text input field with "Password"), and "Use Bulk API" (checkbox). There is an "OR" separator between the "User Name" and "Password" fields. To the right of the "Password" field is a button labeled "Connect to Salesforce (OAuth)". At the bottom right of the page, there are three buttons: "Test connection", "Save", and "Next".



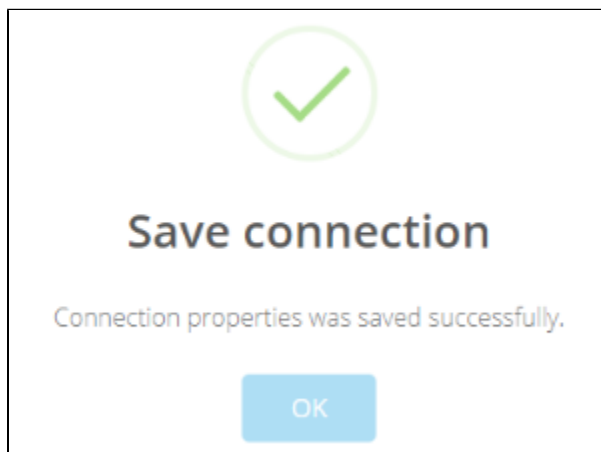
The screenshot shows the "MSCRM Details" setup page in the DBSync Cloud Replication & CDM portal. The page has a dark sidebar on the left with navigation links: "My Account", "Home", "Profile", "MSCRM Setup", "Database Setup", "Advanced Settings", "Objects", "Export", "Schedule Jobs", and "Logs". The main content area is titled "MSCRM Details" and contains the following fields: "Soap Endpoint" (text input field with "Soap Endpoint"), "User Name" (text input field with "User Name"), and "Password" (text input field with "Password"). At the bottom right of the page, there are three buttons: "Test connection", "Save", and "Next".

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.

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



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



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

Configure database setup details

Start with the **database setup tab**, to fill all the necessary details and follow the same procedure for testing and validating your database credentials.

Follow these steps to configure your database credentials with different databases like **MySQL, SQL Server, Oracle, DB, PostgreSQL, Cassandra, AWS Redshift, Snowflake, Sybase, and MongoDB**.

1. Click to **"database" setup tab** on the left-hand corner in the profiles section of the DBSync replication portal.
2. Select, the required **"type name"** from the **drop-down menu** options like **"MySQL, SQL Server, Oracle, DB, PostgreSQL, Cassandra, AWS RedShift, Snowflake, Sybase, and MongoDB"** under the **"database setup" section**.

The screenshot shows the 'Database Details' configuration page in the DBSync Cloud Replication & CDM portal. On the left is a sidebar with navigation links: My Account, Home, Profile, Salesforce Setup, Database Setup (active), Advanced Settings, Objects, Export, Schedule Jobs, and Logs. The main form contains the following fields: 'Type' (a dropdown menu with 'SQLServer' selected and a list of other database types visible), 'Host', 'User Name', 'Password', 'Database', 'Port', 'Schema' (set to 'dbo'), and 'URL' (pre-filled with 'jdbc:sqlserver://;database='). There is an 'Enable SSL' checkbox. At the bottom, there is a section titled 'Advanced Settings for File Download' and three buttons: 'Test Connection', 'Save', and 'Next'.

(Note: The database URL can also be entered manually if you know your database Connection string.)

3. **To start with database credentials user has to enter all the configuration details like host, port, username, password, database name, and schema.**
4. Once, all the details enter by the user then URL details will get auto-filled.
5. Click on the **Test Connection button** to validate your source application login details.
6. Click on **save button to save your source apps login details**.
7. Once completed, click on the **next button to proceed to the advanced settings tab to get the email Id to get the notifications**.

Note:

- While replicating with Cassandra, please refer to the following wiki link for specific details on Replication with Cassandra. <http://help.mydbsync.com/docs/display/CloudReplication/3+-+Big+Data+Support>
- While replicating with Amazon Redshift database, please refer to the following wiki link for specific details on Replication with Amazon Redshift. <http://help.mydbsync.com/docs/display/CloudReplication/Amazon+Redshift>

Advanced settings tab details

Start with **advanced settings tab**, to fill all the necessary details and follow the same procedure for testing and validating Advanced settings credentials.

Follow these steps to configure your Advanced settings credentials.

1. Click to **"advanced" settings tab** on the left-hand corner in the Profiles section of the DBSync replication portal.
2. Mark the checkbox to **"enable database logging"** to create an auto-created table in the database.
3. Next, Mark the checkbox of **"email only on error"** to get an email message when error will occur.
4. Enter an email for an **"email recipient"** to get the notification when any run command is executed.
5. Click on **save button to save your advanced settings details**.
6. Once the process is completed then click on **save and next button to proceed further**.

My Account ▾

Home

Profile

Salesforce Setup

Database Setup

Advanced Settings

Objects

Export

Schedule Jobs

Logs

DBSync Cloud Replication & CDM

Wiki Log out

Advanced Settings

Notifications

Enable Database Logging

☐

SFLOG__C table will be auto created in the database

Email Only on Error

☐

An email message will be sent only if an error occurs

Email Recipients

Advanced

Process only non-replicable objects

☐

These are Salesforce.com objects that cannot have bi-directional sync and require complete data replication instead of incremental replication.

Cancel

Save

Next

Source application objects tab

Start with Source Application Objects tab, to get synced all the objects when the user will get connected to different source applications like Salesforce and Microsoft CRM.

Follow these steps to synced all objects for source application like Salesforce and Microsoft CRM.

1. Click to **"objects"** tab on the left-hand corner in the Profiles section of the DBSync replication portal.
2. Once, a user has connected to source applications like Salesforce and Microsoft CRM then objects will get synced and it will show on the objects tab.
3. Select any **"source apps objects"** you want to sync into database from the left objects section as shown below.

AVSFQB_Invoices_Chang

AVSFQB_Invoices_c

AcceptedEventRelation

Account

AccountChangeEvent

AccountCleanInfo

AccountContactRole

AccountFeed

AccountHistory

AccountPartner

AccountShare

ActionLinkGroupTemplate

ActionLinkTemplate

ActivityHistory

AdditionalNumber

AggregateResult

Announcement

ApexClass

ApexComponent

ApexEmailNotification

Available Fields

Count 90

AccountNumber - < VARCHAR >

AccountSource - < VARCHAR >

Active_c - < VARCHAR >

AnnualRevenue - < DECIMAL >

AVSFQB_Billing_Address_c - < CLOB >

AVSFQB_Billing_City_c - < VARCHAR >

AVSFQB_Billing_Country_c - < VARCHAR >

AVSFQB_Billing_State_c - < VARCHAR >

AVSFQB_Billing_Zip_c - < VARCHAR >

AVSFQB_Credit_Limit_c - < VARCHAR >

AVSFQB_Email_c - < VARCHAR >

AVSFQB_Fax_c - < VARCHAR >

AVSFQB_First_Name_c - < VARCHAR >

AVSFQB_Last_Name_c - < VARCHAR >

AVSFQB_Open_Balance_c - < DECIMAL >

AVSFQB_Phone_c - < VARCHAR >

Excluded Fields

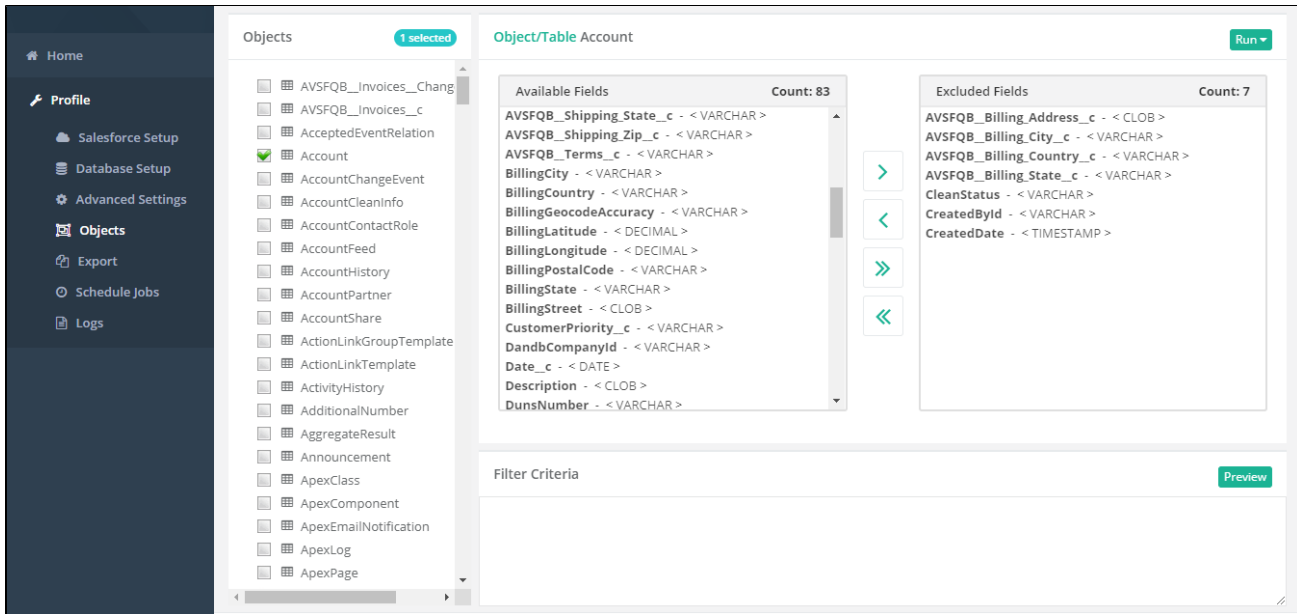
Count 0

Filter Criteria

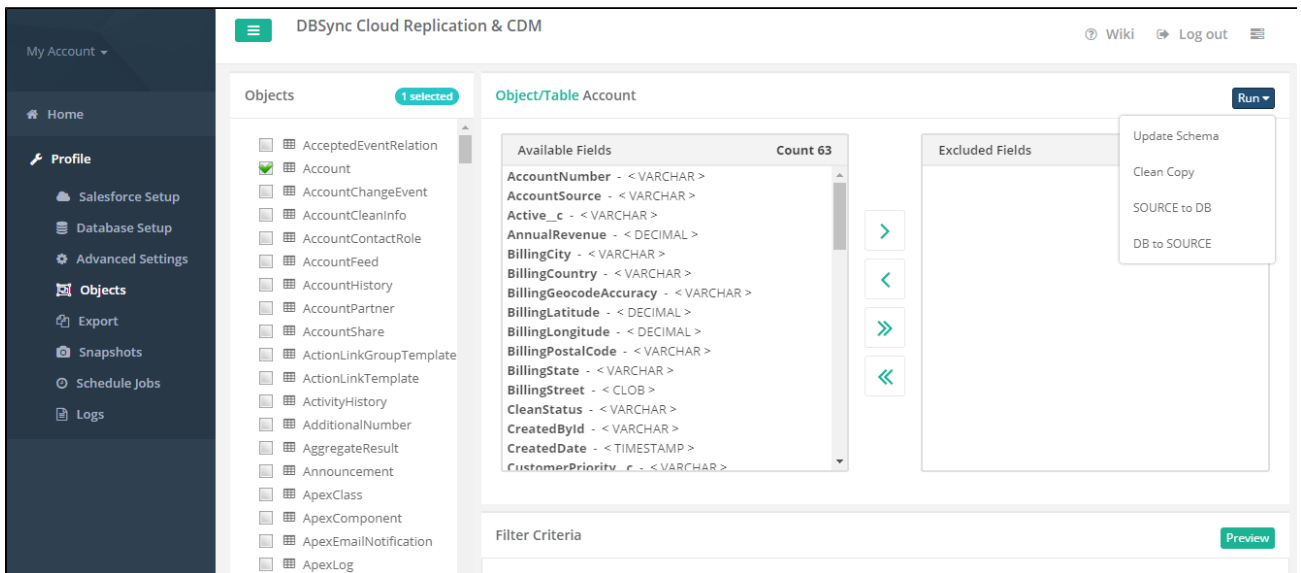
Type = ' Customer ' and AccountNumber != ' 4567 '

Preview

4. Select the object fields you want to sync into database from the **"Available Fields"** section and use **"exclude fields"** section to filter out fields you don't want to sync into the database.



- Once completed, click on the **"run button"** to Run the configuration for the **source apps object**.



- Run menu to select the required commands like an **update database schema, source apps to the database (Clean Copy), source apps to the database (Incremental)** to execute.
As per the above commands here the user has to **select the Clean copy and Source to Database command to replicate all the sync objects to their database**.
- Once the user has selected and **"Run"** the Command, then it will redirect to the user on the **log screen tab** to see the status of the command is completed or not.

Below section explains the steps involved in **source apps to database replication**.

Run Process	Actions Performed
Update database schema	Creates source apps schema into database for the selected source apps objects.
Source apps to database (Clean Copy)	Inserts a clean copy of selected source apps object records into respective database tables & columns.
Source apps to database (Incremental)	Performs incremental sync from source apps to the database based on the changes/edits made in the source.

Configure schedule jobs tab

Start with the Scheduler Jobs tab, where 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 the 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 **the Save button to proceed further**.

My Account ▾

Home

Profile

Salesforce Setup

Database Setup

Advanced Settings

Objects

Export

Schedule Jobs

Logs

DBSync Cloud Replication & CDM

Wiki Log out

Schedule Jobs

Command

Update Schema ▾

Starts On

12/12/2018

05:10

Repeat

No Repeat ▾

Save

Cancel

Tasks

Task Name	Repeat	Start Date Time	Next Fire Date Time	Command	Actions
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