

Scheduler for Replication

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

Log in to the DBSync replication portal

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

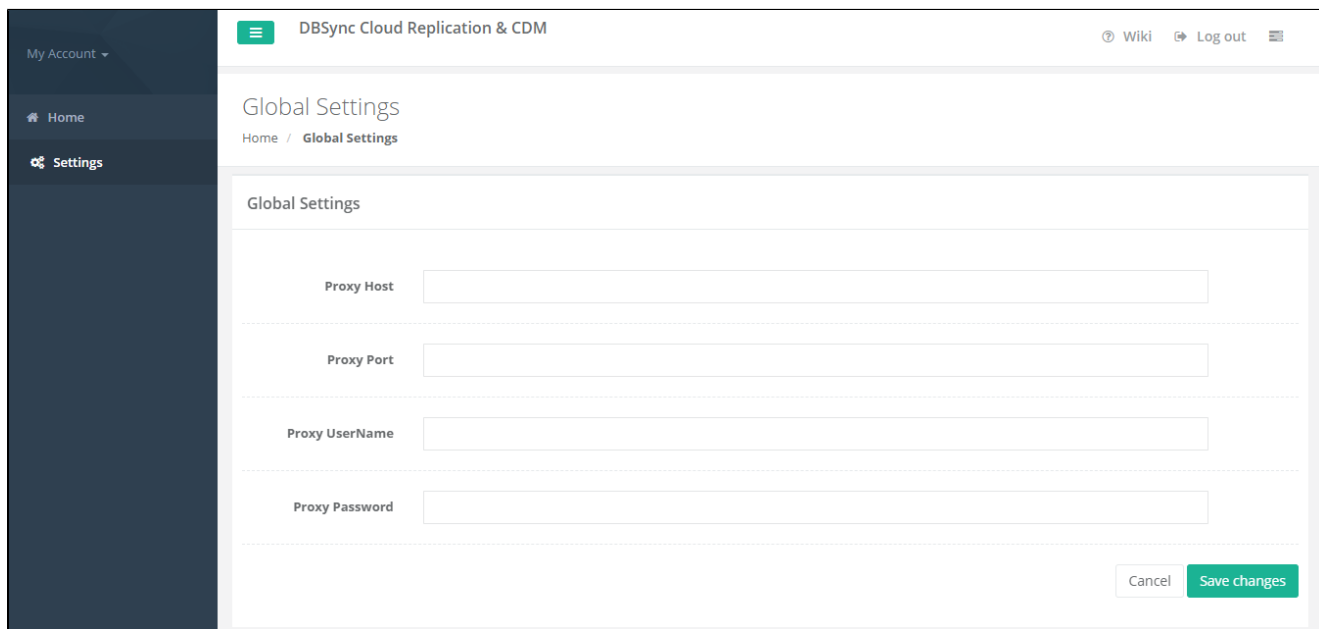
Fill the configuration details in global settings

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 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'. The main content area has a header with the portal name and user options like 'Wiki', 'Log out', and a menu icon. Below the header, the 'Global Settings' section is visible, featuring 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'.

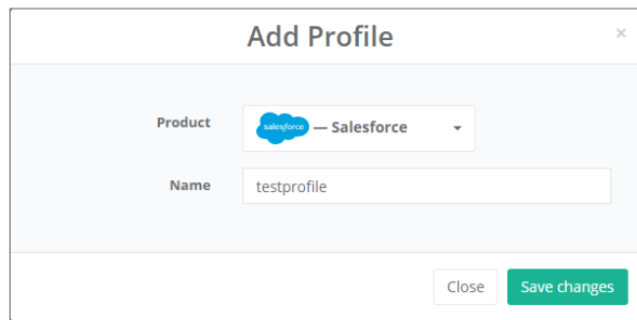
Create a source application profile

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

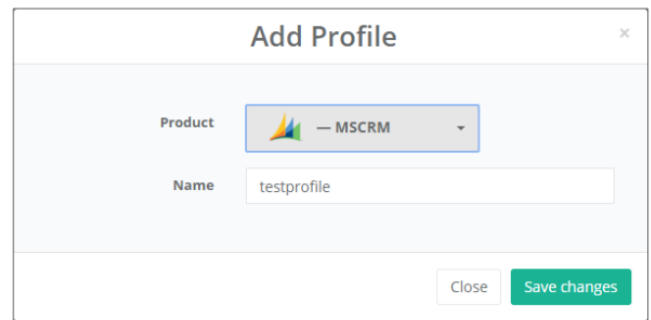


Add Profile

Product: Salesforce

Name: testprofile

Close Save changes



Add Profile

Product: MSCRM

Name: testprofile

Close Save changes

Source application setup details

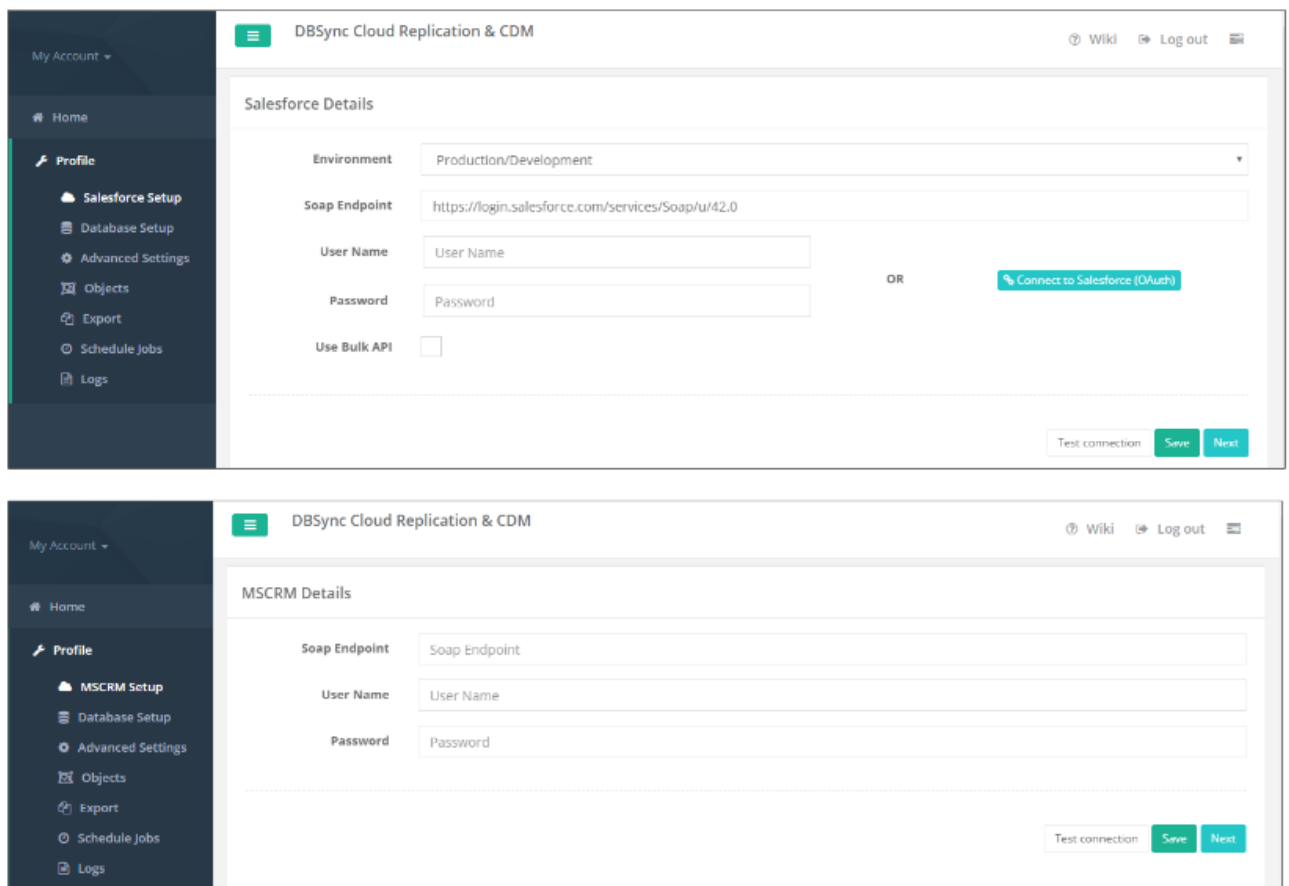
Start with source application setup details includes Salesforce and Microsoft CRM.

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**.

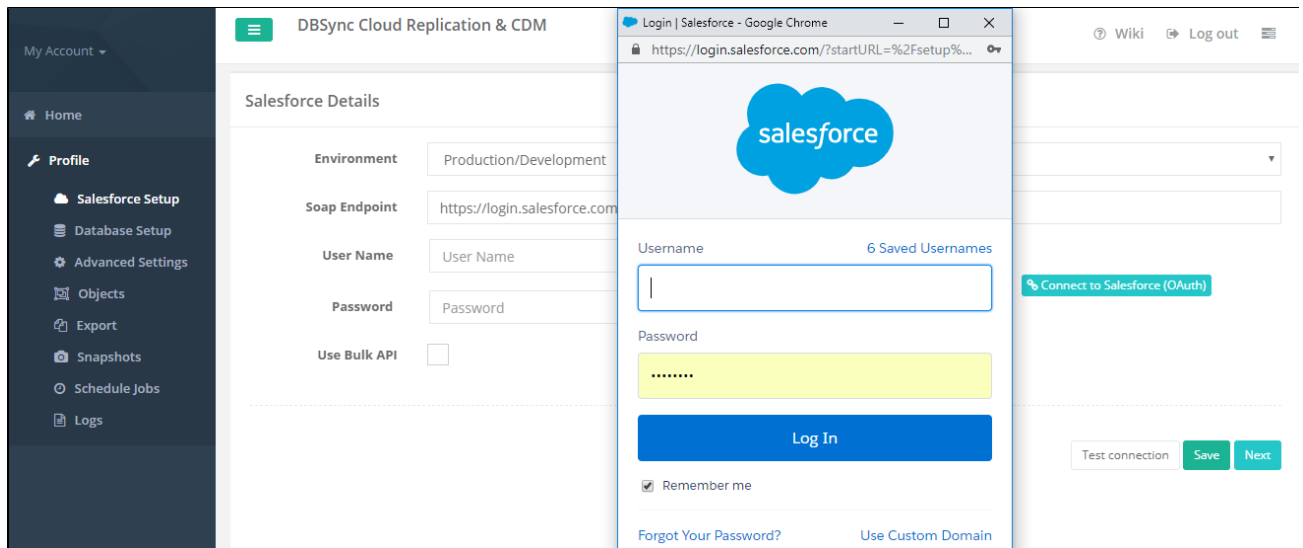
Figure:3



The figure shows two screenshots of the DBSync Cloud Replication & CDM interface. The top screenshot displays the 'Salesforce Details' setup page. It includes a sidebar with navigation options: Home, Profile, Salesforce Setup, Database Setup, Advanced Settings, Objects, Export, Schedule Jobs, and Logs. The main content area has fields for Environment (Production/Development), Soap Endpoint (https://login.salesforce.com/services/Soap/u/42.0), User Name (User Name), Password (Password), and a checkbox for Use Bulk API. There is an 'OR' section with a 'Connect to Salesforce (OAuth)' button. At the bottom, there are 'Test connection', 'Save', and 'Next' buttons. The bottom screenshot displays the 'MSCRM Details' setup page, which has similar fields for Soap Endpoint, User Name, and Password, along with 'Test connection', 'Save', and 'Next' buttons.

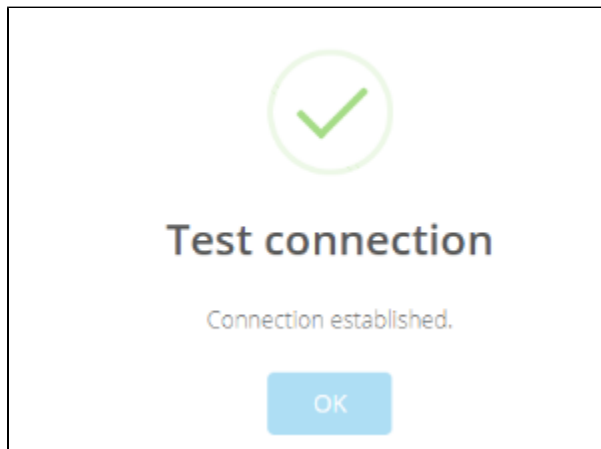
4. **"OR", "Other option for salesforce"** click on connect to **Salesforce (OAUTH)** to enter Salesforce login credentials like **"username" and "password"** to connect the salesforce application.

Figure:4



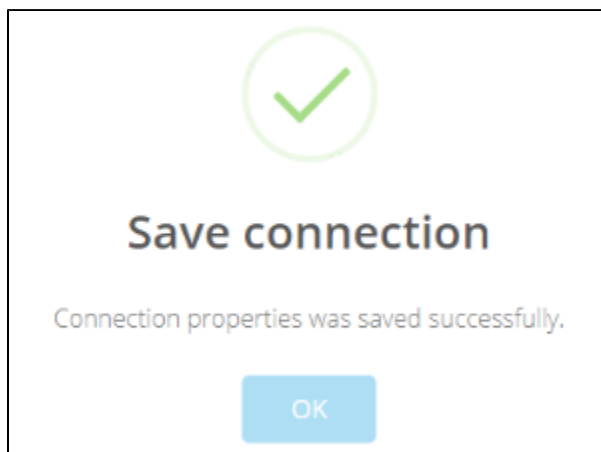
- Click on **test connection button** to validate your source application login details.

Figure:5



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

Figure:6



- 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

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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