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.
- 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

My Account 👻	■ DBSync Cloud Replication & CDM	⑦ Wiki	🕒 Log out	
希 Home	Global Settings			
ත්දී Settings	nume / Global settings			
	Global Settings			
	Proxy Host			
	Proxy Port			
	Proxy UserName			
	Proxy Password			
		Cano	el Save ch	anges

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	×		Add Profile	×
Product	Calesforce +		Product	🕌 — MSCRM	*
Name	testprofile		Name	testprofile	
	Clos	e Save changes			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

My Account +	DBSync Cloud Re	③ Wiki 🖙 Log out 📷		
# Home	Salesforce Details			
≠ Profile	Environment	Production/Development		•
Salesforce Setup	Soap Endpoint	https://login.salesforce.com/services/Soap/u/42.0		
Database Setup Advanced Settings	User Name	User Name		
JSI Objects	Password	Password	OR	% Connect to Salesforce (DAuth)
연 Export Ø Schedule lobs	Use Bulk API			
E Logs				
				Test connection Sear Next
My Account +	DBSync Cloud Re	eplication & CDM		🖲 Wiki 👒 Log out 📼
	MSCRM Details			
W Home	Form Forderalet			
> Profile	soap Endpoint	Soap Endpoint		
MSCRM Setup	User Name	User Name		
Advanced Settings	Password	Password		
- 쩐 Objects				
街 Export				
O Schedule Jobs				Test connection Save Next
Logs				

 "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

	DBSync Cloud Replication & CDM		Login Salesforce - Google Chrome	- 0	×	2 Wiki 🗈 Log out 🗮
My Account 👻			https://login.salesforce.com/?startURL=%2Fsetup%			
骨 Home	Salesforce Details		salesfo	orce		
🗲 Profile	Environment	Production/Development				T
Salesforce Setup	Soap Endpoint	https://login.salesforce.com				
 Advanced Settings 	User Name	User Name	Username	6 Saved Usernar	mes	
Di Objects	Password	Password				Sonnect to Salesforce (OAuth)
Snapshots	Use Bulk API		Password			
 Schedule Jobs 						
Logs			Log In	1		
			🖉 Remember me			Test connection Save Next
			Forgot Your Password?	Use Custom Dom	nain	

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.
- 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	7
-----------	---

My Account 🗸	BBSync Cloud Replication & CDM					🕞 Log out 🛛 🛢
希 Home	Schedule Jo	bs				
🌾 Profile	Command	Update Schema	• Starts On	≅ 12/12/2018	O 05:10	
 ▲ Salesforce Setup ■ Database Setup ◆ Advanced Settings ☑ Objects 	Repeat	No Repeat	•			Save Cancel
岱 Export O Schedule Jobs 급 Logs	Tasks					
	Task Name	Repeat	Start Date Time	Next Fire Date Time	Command	Actions