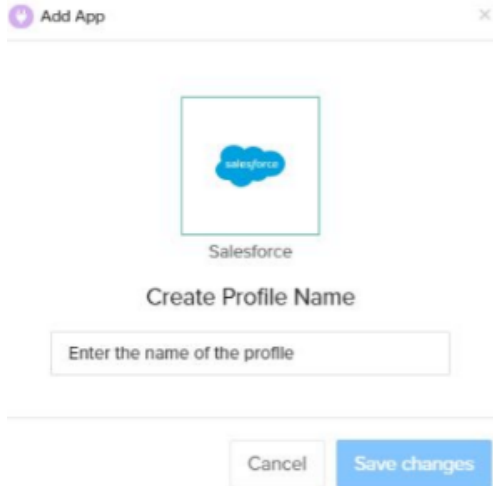


## 2- Getting Started

Get started by creating a profile and replicate of your Salesforce instance to different databases.  
Follow the Steps below for initial setup guidelines.

### Create Profile

1. Login to the local host of DBSync Salesforce Replication instance using respective username and password.
2. Get started by clicking on the Add App to create a profile for configure replication.



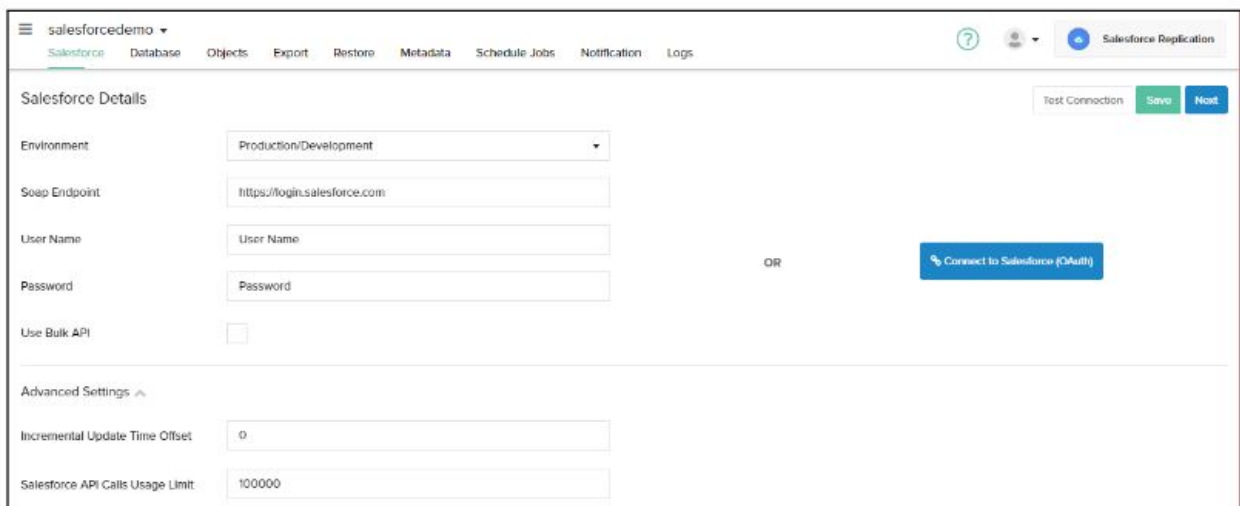
- Enter the desired profile name and click Save.
- New profile will now be created.
- Click on the profile name.
- You will be redirected to setup your Salesforce instance.

### Salesforce Setup

There are two ways to setup your Salesforce profile

1. Enter the "username" and "password" credential to manually . Save and Test the connection.  
Note : Environment and soap end details would be pre-filled. Do not change unless necessary.
2. Click on Connect to Salesforce for instant web authentication.

Now click on **Next** to Setup Database



### Database Setup

- Select the Type of database to which you wish to replicate the Salesforce instance linked in the previous step.
- To start with, the database credentials of the user are required such as Host, Port, Username, Password, Database name, and Schema.

- Based all the details entered by the user, URL field gets auto-filled.

The screenshot shows the 'Database Details' configuration page. The 'Type' is set to 'SQLServer'. The 'Host' and 'Port' fields are empty. 'User Name' and 'Password' are also empty. The 'Database' field contains 'Database Name' and the 'Schema' is 'dbo'. The 'URL' field is auto-filled with 'jdbc:sqlserver://;database='. The 'Enable Integrated Security' checkbox is unchecked. Buttons for 'Test Connection', 'Save', and 'Next' are visible.

Now click on **Next** to select the Objects of your Salesforce instance.

### Object Selection & Run Command

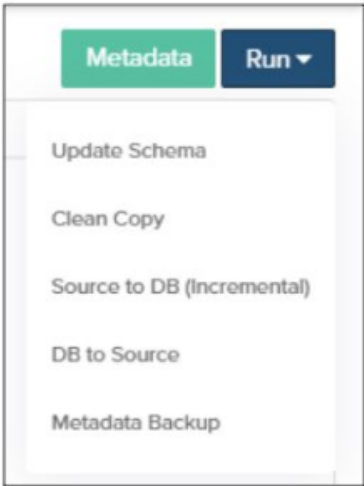
- Once, a user has connected to Salesforce then objects will get synced and it will show on the objects tab.
- Select any "Salesforce objects" to sync into the database objects table section as shown below.

The screenshot shows the 'Objects' selection interface. A search bar 'Find Objects' is at the top. Below it, there's a 'Select All' button and a '1 selected' badge. The list of objects includes 'Account' (which is selected with a green checkmark), 'Contact', and 'User'.

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

The screenshot shows the 'Object/Table Account' configuration page. It has two main sections: 'Available Fields' (Count: 63) and 'Excluded Fields' (Count: 1). In the 'Available Fields' list, 'BillingLongitude - < DECIMAL >' is highlighted. In the 'Excluded Fields' list, 'BillingCountry - < VARCHAR >' is listed. Arrows between the sections allow moving fields back and forth. Buttons for 'Metadata' and 'Run' are at the top right.

- Click the RUN button and select Clean Copy command to get an exact copy of your Salesforce selected objects.



**Attributes of Run Command**

Run Process	Actions Performed
Update Schema	Creates source apps schema into database for the selected source apps objects.
Clean Copy	Inserts a clean copy of Salesforce object records into respective database tables & columns.
Source to DB	Performs incremental sync from Salesforce to the database based on the changes/edits made in the Salesforce
DB to Source	Performs incremental sync from Database to the Salesforce based on the changes/edits made in the Database
Metadata Backup	Backs up your metadata for the objects selected from you Salesforce instance