

4- Source Applications to Database

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, DB, 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

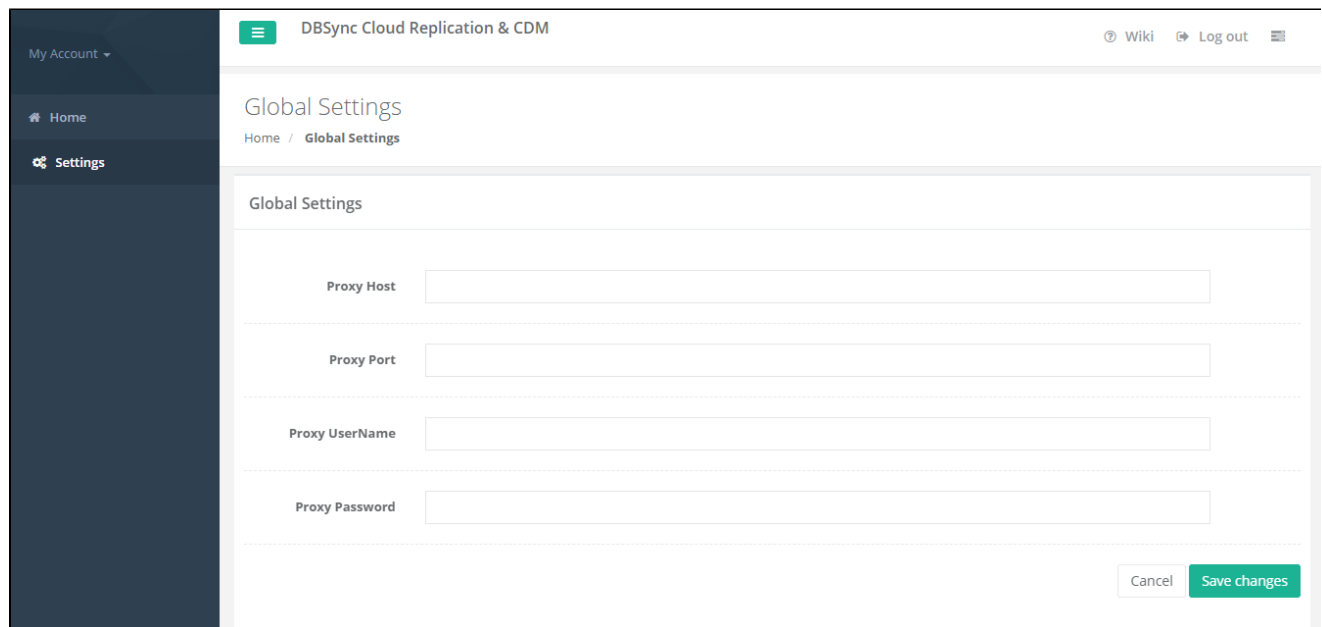
Sign in to the [DBSync Replication portal](#).

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 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.**



The screenshot displays the 'Global Settings' page in the DBSync Cloud Replication & CDM portal. The left sidebar includes a 'My Account' dropdown, a 'Home' link, and a 'Settings' link which is currently active. The main content area has a header 'Global Settings' with a breadcrumb 'Home / Global Settings'. Below this, there is 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 applications like Salesforce and Microsoft CRM.

1. Click to **"add profile"** in the right-hand corner of the profiles section of the 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.**

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 application 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 the 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" credentials for Salesforce and Microsoft CRM**.

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Salesforce Details

Environment

Production/Development

Soap Endpoint

https://login.salesforce.com/services/Soap/u/42.0

User Name

User Name

OR

Connect to Salesforce (OAuth)

Password

Password

Use Bulk API

☐

Test connection

Save

Next

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MSCRM Details

Soap Endpoint

Soap Endpoint

User Name

User Name

Password

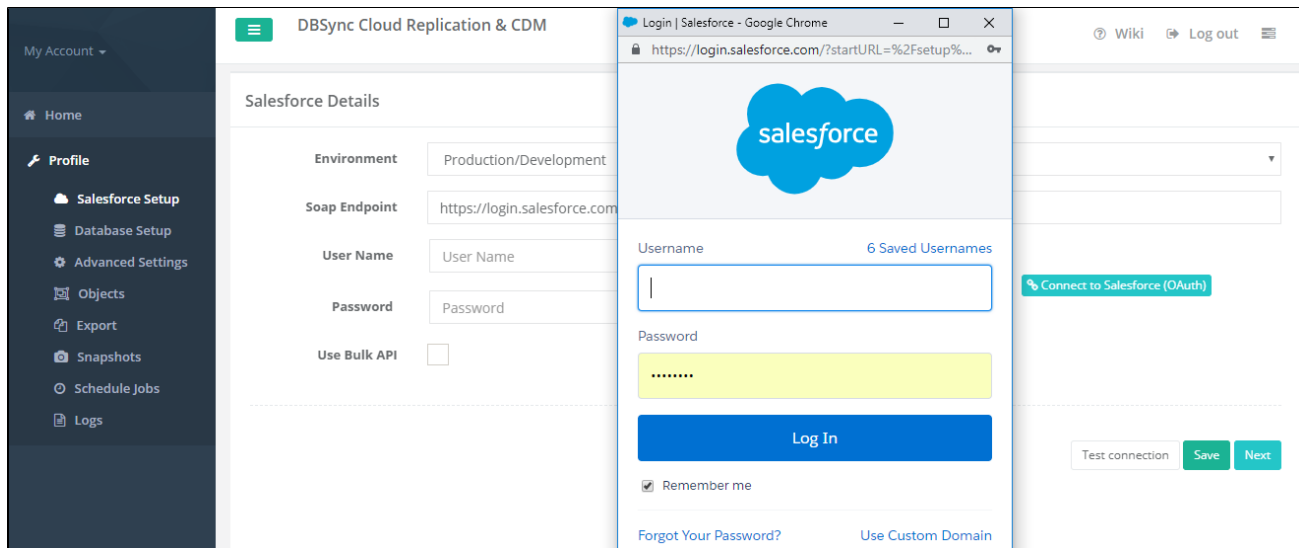
Password

Test connection

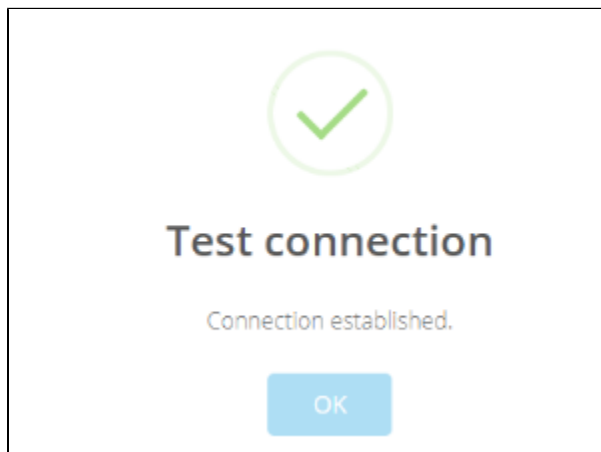
Save

Next

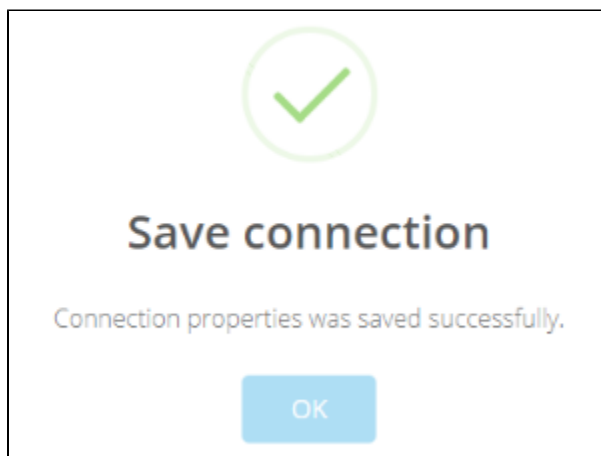
4. **"OR", "Other option for salesforce"** click on connect to **Salesforce (OAUTH)** to enter Salesforce login credentials like **"username" and "password"** to connect the Salesforce application.



5. Click on the **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' form. The left sidebar has a 'test' tab selected. The form fields are: Type (dropdown menu open), Host, Port, User Name, Password, Database, and URL. The dropdown menu for Type shows options: MySQL, SQLServer, Oracle, DB2, MySQL (highlighted), PostgreSQL, Cassandra, AWS Redshift, Sybase, MongoDB, AWS S3, and Snowflake. The URL field contains 'jdbc:mysql://'. At the bottom right, there are buttons for '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 entered 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 the **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 the 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 the **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 the **save button to save the details of your advanced setting.**
6. Once the process is completed then click on **save and next button to proceed further.**

My Account ▾

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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, the 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 a 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 >

>

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Excluded Fields

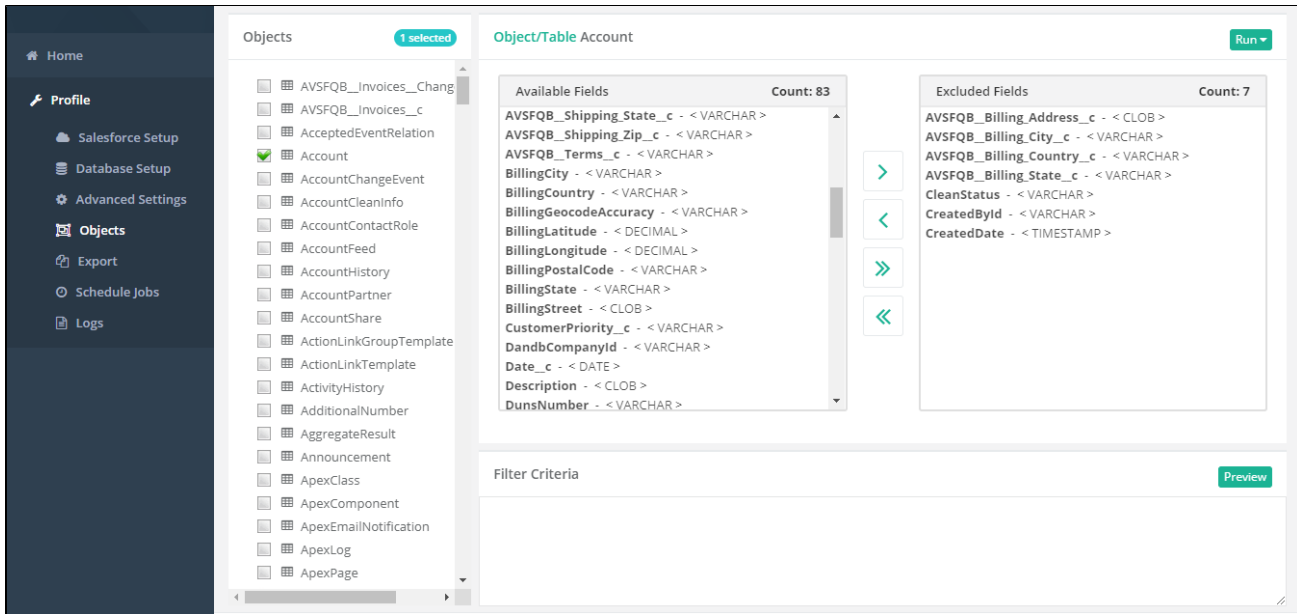
Count 0

Filter Criteria

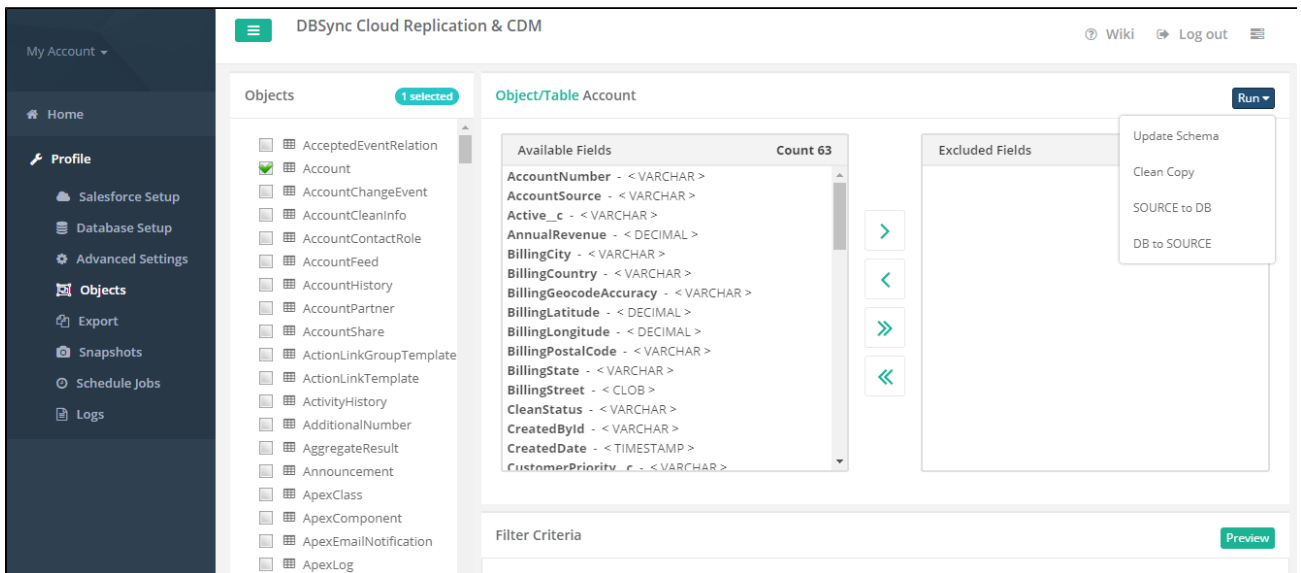
Type = ' Customer ' and AccountNumber != ' 4567 '

Preview

4. 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 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.

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

Run Process	Actions Performed
Update database schema	Creates source apps schema into the 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 a 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 the 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, the user has connected to source applications like Salesforce and Microsoft CRM then objects will get synced and the 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**.

The screenshot shows the 'Schedule Jobs' configuration page in the DBSync Cloud Replication & CDM portal. The left sidebar contains navigation links: My Account, Home, Profile, Salesforce Setup, Database Setup, Advanced Settings, Objects, Export, Schedule Jobs (selected), and Logs. The main content area is titled 'Schedule Jobs' and includes a 'Command' dropdown set to 'Update Schema', a 'Repeat' dropdown set to 'No Repeat', and a 'Starts On' section with a date picker set to '12/12/2018' and a time picker set to '05:10'. There are 'Save' and 'Cancel' buttons. Below this is a 'Tasks' section with a table header: Task Name, Repeat, Start Date Time, Next Fire Date Time, Command, and Actions.

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