

## 5. Salesforce Field Selection

DBSync Replication (Source to DB) allows choosing only the required fields for replication. There is an option to select only the required fields (including fields) and there is also an option to eliminate the unwanted fields (excluding fields).

'Salesforce Sync Object Details' tab in DBSync Cloud Replication shows Salesforce objects & fields name. Based on the requirement appropriate **objects & fields** must be selected either to exclude or include. Selection process is explained below with example.

The screenshot shows the DBSync Cloud Replication interface. On the left, a list of Salesforce objects is displayed, with 'Account' selected. The main area is divided into three sections: 'Available Fields' (Count 90), 'Excluded Fields' (Count 0), and 'Filter Criteria'. The 'Available Fields' list includes fields like AccountNumber, AccountSource, Active\_c, AnnualRevenue, AVSFQB\_Billing\_Address\_c, AVSFQB\_Billing\_City\_c, AVSFQB\_Billing\_Country\_c, AVSFQB\_Billing\_State\_c, AVSFQB\_Billing\_Zip\_c, AVSFQB\_Credit\_Limit\_c, AVSFQB\_Email\_c, AVSFQB\_Fax\_c, AVSFQB\_First\_Name\_c, AVSFQB\_Last\_Name\_c, AVSFQB\_Open\_Balance\_c, and AVSFQB\_Phone\_c. The 'Excluded Fields' list is empty. The 'Filter Criteria' section shows the filter: 'Type = 'Customer ' and AccountNumber != '4567 '.

### Example to include required fields only:

Step 1: Salesforce Account Details are as shown below. Let us replicate only Name, Type, Fax & SLA fields into database.

Step 2: In DBSync Cloud Replication, under 'Sales Sync Object Details' Tab, select 'Account'. Move all the API names from **Available Fields to Exclude Fields using >>>**.

The screenshot shows the DBSync Cloud Replication interface. On the left, a list of Salesforce objects is displayed, with 'Account' selected. The main area is divided into three sections: 'Available Fields' (Count: 83), 'Excluded Fields' (Count: 7), and 'Filter Criteria'. The 'Available Fields' list includes fields like AVSFQB\_Shipping\_State\_c, AVSFQB\_Shipping\_Zip\_c, AVSFQB\_Terms\_c, BillingCity, BillingCountry, BillingGeocodeAccuracy, BillingLatitude, BillingLongitude, BillingPostalCode, BillingState, BillingStreet, CustomerPriority\_c, DandbCompanyId, Date\_c, Description, and DunsNumber. The 'Excluded Fields' list includes fields like AVSFQB\_Billing\_Address\_c, AVSFQB\_Billing\_City\_c, AVSFQB\_Billing\_Country\_c, AVSFQB\_Billing\_State\_c, CleanStatus, CreatedByld, and CreatedDate. The 'Filter Criteria' section is empty.

Step 3: Select Name, Type, Fax & SLA\_c (API name for SLA field{ }) in Exclude Fields (Ctrl key must be used to select all these at once) and move this to available fields (using <). Save the selection and \*run \*the Replication Source to DB.

The screenshot shows the DBSync Cloud Replication & CDM interface. On the left is a sidebar with navigation options: My Account, Home, Profile, Salesforce Setup, Database Setup, Advanced Settings, Objects (selected), Export, Snapshots, Schedule Jobs, and Logs. The main area is titled 'Object/Table Account'. It features a list of 'Objects' on the left, with 'Account' selected. The 'Available Fields' list contains 63 fields, including AccountNumber, AccountSource, Active\_c, AnnualRevenue, BillingCity, BillingCountry, BillingGeocodeAccuracy, BillingLatitude, BillingLongitude, BillingPostalCode, BillingState, BillingStreet, CleanStatus, CreatedByld, CreatedDate, and CustomerPriority. The 'Excluded Fields' list is currently empty. A context menu is open over the 'Excluded Fields' list, showing options: Update Schema, Clean Copy, SOURCE to DB, and DB to SOURCE. Below the fields lists is a 'Filter Criteria' section with a 'Preview' button.

Step 4: Confirm in Tomcat that replication was successful. Database will have only Name, Type, Fax & SLA\_c columns along with DO\_SYNC\_FLAG and other Id columns.

## Example to exclude selected fields only:

Step 1: Salesforce Account Details are as shown below. Let us replicate all the fields in the Accounts Object except Billing Street and Billing City fields.

Step 2: In DBSync Cloud Replication, under 'Sales Sync Object Details' Tab, select 'Account'. Move Billing Street and Billing City fields from Available Fields to Exclude Fields using -> button. Save the selection and run the Replication Source to DB.

This screenshot is similar to the previous one but shows the result of moving 'BillingCity' and 'BillingStreet' to the 'Excluded Fields' list. In the 'Available Fields' list, 'BillingCity' and 'BillingStreet' are now crossed out. The 'Excluded Fields' list is now empty, but the context menu remains open over it, showing the same options: Update Schema, Clean Copy, SOURCE to DB, and DB to SOURCE. The rest of the interface, including the sidebar and the 'Object/Table Account' header, remains the same.

Step 3: Confirm in Tomcat that replication was successful. Database will have all the accounts field columns along with DO\_SYNC\_FLAG and other Id columns except Billing Street & Billing City Columns.

