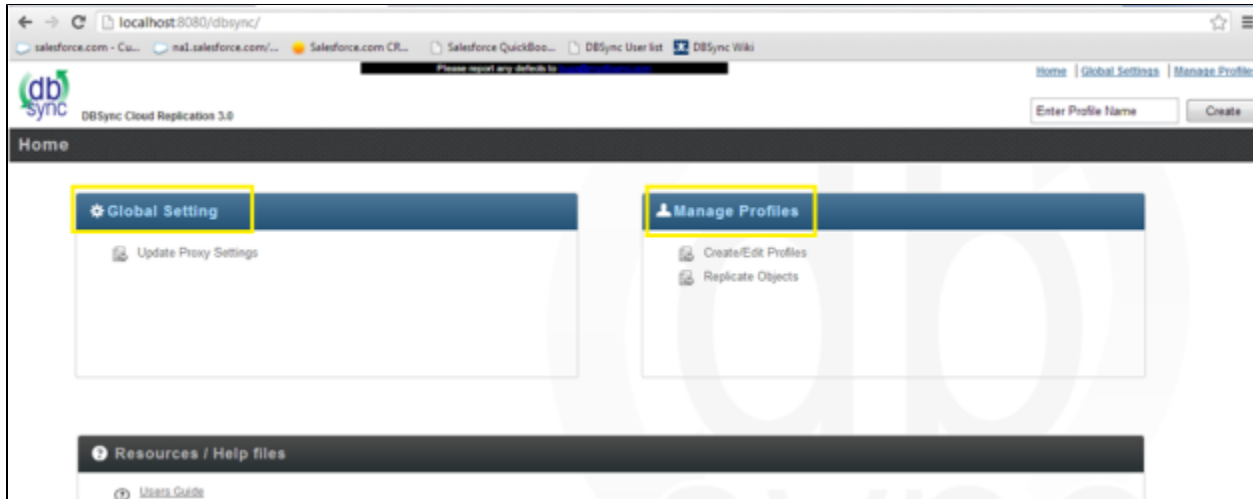


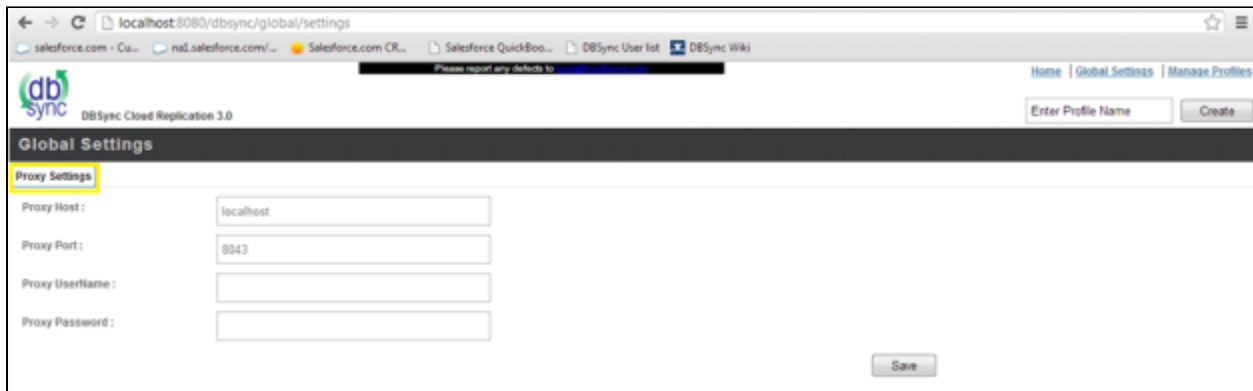
Navigation

Navigation in DBSync Cloud Replication Console:

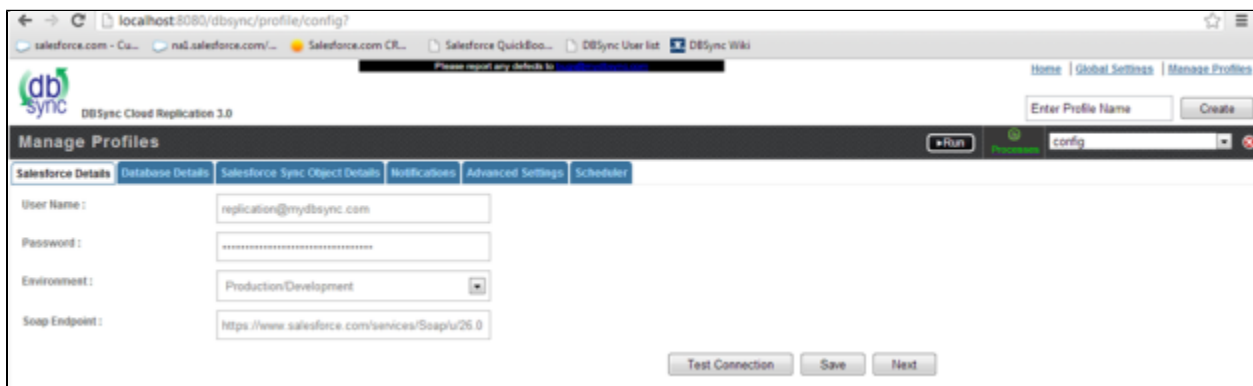
- Home page for DBSync Cloud Replication Console is as shown below. **Global Settings** helps to update Proxy Settings. **Manage Profiles** helps to create or edit profiles and to perform Replication.



- **Global Settings** provides an option to update **Proxy setting** by entering **Proxy Host**, **Proxy Port**, **Proxy Username** and **Proxy Password**. **Save** must be clicked to save settings.



- **Manage Profiles** helps to create or edit profiles and to perform Replication. **Manage Profiles** screen looks as below. **Profile Name** must be entered and **Create** button must be clicked to create new profile and all the tab details must be saved.



- In **Salesforce Details** tab shown above Salesforce credentials must be entered along with Salesforce environment and soap point. Connection can be tested using **Test Connection** button. **Save** button saves the settings and **Next** button takes to the next tab.
- In **Database Details** tab Database credentials must be entered along with Database URL by entering Type, Host, Port and Database name. The database URL can also be entered manually if database Connection string is known and available.

The screenshot shows the 'Manage Profiles' interface for DBSync Cloud Replication 3.0. The 'Database Details' tab is active. It contains fields for 'Database Username' (set to 'sa'), 'Database Password' (masked with asterisks), and 'Database URL'. The 'Database URL' section includes sub-fields for 'Type' (SQL Serv), 'Host' (localhost), 'Port' (1433), and 'Database' (dbsync), with a text area below showing the JDBC URL: 'jdbc:sqlserver://localhost:1433:database=dbsync'. At the bottom are 'Test Connection', 'Save', and 'Next' buttons.

- **Salesforce Sync Object Details** tab helps to select the required object and field for replication. **Filter Criteria** can be used to meet the required condition for replication using basic SOQL operators.

The screenshot shows the 'Salesforce Sync Object Details' tab. On the left, a list of objects includes 'Account' (checked), 'Contact', and 'User'. The main area displays 'Object/Table: Account' with two columns: 'Available Fields' and 'Exclude Fields'. The 'Available Fields' list includes fields like 'IsDeleted', 'MasterRecordId', 'Name', 'Type', 'ParentId', 'BillingStreet', 'BillingCity', 'BillingState', 'BillingPostalCode', 'BillingCountry', 'ShippingStreet', 'ShippingCity', 'ShippingState', 'ShippingPostalCode', 'ShippingCountry', 'Phone', 'Fax', 'AccountNumber', 'Website', and 'Site'. Below this list, 'Fields Count: 45' is shown. The 'Exclude Fields' column is empty, with 'Fields Count: 0' below it. A 'Filter Criteria' text area is at the bottom with a 'Save' button. A 'Next' button is also present.

- **Notifications** tab helps to configure the Replication tool to send sync notifications to specified email address and also use the Database for logging in Sync logs upon every sync.

localhost:8080/dbsync/profile/MySQL?#tab-4n

salesforce.com - Cu... na1.salesforce.com/... Salesforce.com CR... Salesforce QuickBoo... DBSync User list DBSync Wiki

Please report any defects to bugzilla@mydbsync.com

db sync DBSync Cloud Replication 3.0

Manage Profiles Run

Salesforce Details Database Details Salesforce Sync Object Details **Notifications** Advanced Settings Scheduler

Enable Database Logging : ☐ Note: SFLOG__C table will be auto created in the database

Email Recipients :

Email Sender :

Save Next

- **Advanced Settings** tab provides an option to sync non-replicable Salesforce objects into Database.

localhost:8080/dbsync/profile/MySQL?#tab-5n

salesforce.com - Cu... na1.salesforce.com/... Salesforce.com CR... Salesforce QuickBoo... DBSync User list DBSync Wiki

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db sync DBSync Cloud Replication 3.0

Manage Profiles Run

Salesforce Details Database Details Salesforce Sync Object Details **Notifications** Advanced Settings Scheduler

☐ Process only non-replicable objects like AccountShare and LeadShare. These are Salesforce.com objects that cannot have bi-directional sync and require complete data replication instead of incremental replication. (Default behavior will ignore non-replicable objects during data replication).

Save Next

- **Scheduler** Tab helps to schedule the sync. Required Process must be selected in the **Command** drop-down and configure the frequency of the sync by selecting a desired time interval from the **Runs** drop-down.

localhost:8080/dbsync/profile/MySQL?#tab-6n

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db sync DBSync Cloud Replication 3.0

Manage Profiles

Salesforce Details Database Details Salesforce Sync Object Details **Notifications** Advanced Settings **Scheduler**

Schedule for Replication

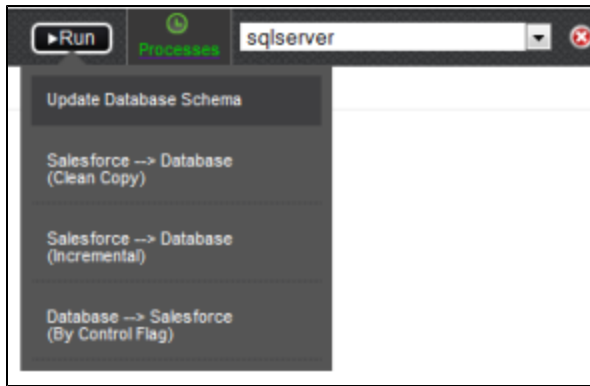
Command

Runs

Cron Expression

Save

- **Run** menu is used to initiate sync by selecting the required process as shown below.



Run Process	Actions Performed
Update Database Schema	Creates Salesforce schema into Database for the selected Salesforce objects.
Salesforce to Database (Clean Copy)	Inserts a clean copy of selected Salesforce object records into respective Database Tables & Columns.
Salesforce to Database (Incremental)	Performs an incremental sync from Salesforce to Database based on the changes / edits made in Salesforce.
Database to Salesforce (By Control Flag)	Identifies changes in the Database and updates Salesforce records based on the database column <i>Do_Sync_Flag</i> attributes. This process is not compatible when Cassandra DB is used for replication.