

6. Salesforce to Database

DBSync Replication tool facilitates Salesforce to Database Replication in three different modes as shown below. This section explains the steps involved in Salesforce to Database Replication

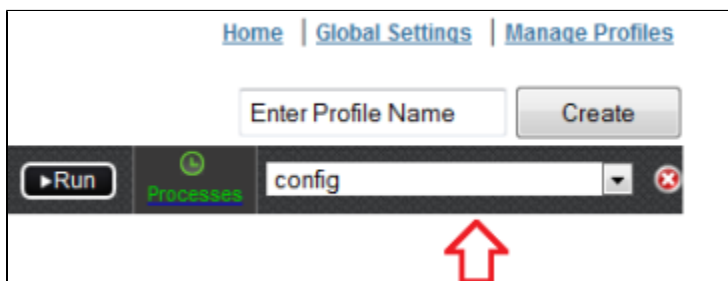
Run Process	Actions Performed
Update Database Schema	Creates Salesforce schema into Database for the selected Salesforce objects.
Salesforce to Database (Clean Copy)	Inserts a clean copy of selected Salesforce object records into respective Database Tables & Columns.
Salesforce to Database (Incremental)	Performs an incremental sync from Salesforce to Database based on the changes / edits made in Salesforce.

- DBSync Replication tool must be installed in your system. Step by step procedure for installation is shown in the topic *Installation*.
- DBSync Replication Console must be started. Step by step procedure to start the console is shown in the topic *Start DBSync Replication Console*.
- Once you are into the Replication UI Console, you can configure the Proxy settings by clicking on **Global Setting** from the menu. Once all the Proxy credentials are entered, click on **Save** button to save the Proxy Settings.



The screenshot shows the 'Global Settings' section of the DBSync Replication 3.0 interface. Under the 'Proxy Settings' tab, there are four input fields: 'Proxy Host', 'Proxy Port', 'Proxy UserName', and 'Proxy Password'. A 'Save' button is located at the bottom right. A banner at the top states: 'This is a Beta Version. If any issue are found kindly email to support@db-sync.com'.

- Once the Proxy settings are configured, you can use the default Replication Profile **config** and configure Salesforce and Database credentials accordingly. The screenshot below shows navigating to the default replication profile.




The screenshot shows the 'Manage Profiles' section of the DBSync Replication 3.0 interface. At the top, there are navigation links: 'Home', 'Global Settings', and 'Manage Profiles'. Below these, there is a text input field labeled 'Enter Profile Name' and a 'Create' button. A 'Run' button is also visible. In the 'Processes' section, a dropdown menu shows 'config' as the selected profile. A red arrow points to the 'config' profile in the dropdown.

- If you want to create a new Profile, navigate to the **Home** page to create a new Replication profile. Enter the desired Name for your new Replication profile under **Profile Name** section and click on **Create** button to create a new Replication Profile.

[Home](#) | [Global Settings](#) | [Manage Profiles](#)

- Click **Manage Profiles** from the home page to configure your Salesforce and Database credentials.
- On the **Salesforce Details** tab, enter your Salesforce login details as shown below. Click on **Test Connection** button to validate your Salesforce login details. Upon getting a success pop-up window, click on **Save** button to save your Salesforce login details.

 DBSync Replication 3.0


Manage Profiles ▶Run

[Salesforce Details](#) | [Database Details](#) | [Salesforce Sync Object Details](#) | [Notifications](#) | [Advanced Settings](#) | [Scheduler](#)

User Name :
 Password :
 Environment :
 Soap Endpoint :

- Click on the **next** button to navigate to **Database Details** tab once all the Salesforce login details are validated and saved.
- On the **Database Details** tab, fill in all the necessary details and follow the same procedure for testing and validating your Database credentials.

Note: The database URL can also be entered manually if you know your database Connection string.

 DBSync Cloud Replication 4.0

Manage Profiles ▶Run

[Salesforce Details](#) | [Database Details](#) | [Salesforce Sync Object Details](#) | [Notifications](#) | [Advanced Settings](#) | [Scheduler](#)

Database Username :
 Database Password :
 Database URL :

Type	Host	Port	Database
SQLServ	27.251.16.1	3306	dbsync
SQL Server	27.251.16.147:3306;database=dbsync		
Oracle			
DB2			
MySQL			
PostgreSQL			
Cassandra			
Redshift			

[Advanced Settings for File Download \(Beta\)](#)

DBSync Version: 4.0.1.4 Copyrights @ 2014, All rights reserved by DBSync

- While replicating with Cassandra, please refer 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 Amazon Redshift database, please refer the following wiki link for specific details on Replication with Amazon Redshift. <http://help.mydbsync.com/docs/display/CloudReplication/Amazon+Redshift>
- At this point, both Salesforce and Database credentials are configured and saved for your Replication profile. You can navigate to the **Salesforce Sync Object Details** tab by clicking on **Next** button.
- In Salesforce Sync Details section, you can select the Salesforce objects you want to sync into Database from the left Objects section as shown below.

Manage Profiles

Salesforce Details Database Details **Salesforce Sync Object Details**

☐ All

☐ Account

☐ Contact

☐ User

- Select a Salesforce Object from Objects section, select the object fields you want to sync into Database from the **Available Fields** section and use **Exclude Fields** section to filter out fields you don't want to sync into Database. Once completed, click on the **Save** button to save the configuration for the Salesforce object. Field selection is explained with the example in the topic [Salesforce Field Selection](#).

Salesforce Sync Object Details Notifications Advanced Settings Scheduler

Object/Table: **Account**

Available Fields	Exclude Fields
IsDeleted	
MasterRecordId	
Name	
Type	
ParentId	
BillingStreet	
BillingCity	
BillingState	
BillingPostalCode	
BillingCountry	
ShippingStreet	
ShippingCity	
ShippingState	
ShippingPostalCode	
ShippingCountry	
Phone	
Fax	
AccountNumber	
Website	
Sic	

Fields Count: 43 Fields Count: 0

Save

- You can also use **Filter Criteria** for adding filters to specific fields using basic SOQL operators. Once completed, click on the **Save** button to save the filter criteria and click on **Next** button to proceed to **Notifications** tab.

Object/Table: Account

Available Fields	Exclude Fields
IsDeleted MasterRecordId Name Type ParentId BillingStreet BillingCity BillingState BillingPostalCode BillingCountry ShippingStreet ShippingCity ShippingState ShippingPostalCode ShippingCountry Phone Fax AccountNumber Website NumberOfEmployees	Sic Industry AnnualRevenue

Fields Count: 47 Fields Count: 3

Filter Criteria:

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

Save Next

- In the **Notifications** tab, you can configure the tool to send sync notifications to the recipient email address and also use the Database for logging in Sync logs upon every sync.
- Enable the checkbox **Enable Database Logging** which will create a SFLOG__C table in your Database.
- Provide Recipient and Sender email address details under **Email Recipients** and **Email Sender** section respectively.
- Once completed, click on **Next** button to proceed to **Advanced Settings** tab.
- The **Advanced Settings** tab provides you an option to sync non-replicable Salesforce objects into Database. Mark the check-box as *checked* to sync non-replicable objects and click on **Save & Next** buttons to proceed further.
- At this point your Replication profile is ready to sync your Salesforce and Database applications as per configurations. Initiate the sync using the **Run** menu to select the required process to execute.

Run **Processes** sqlserver

- Update Database Schema
- Salesforce → Database (Clean Copy)
- Salesforce → Database (Incremental)
- Database → Salesforce (By Control Flag)

- You can also schedule the sync using the **Scheduler** Tab. Select the required Process from the **Command** dropdown and configure the frequency of the sync by selecting a desired duration from the **Runs** dropdown. The below screenshot illustrates configuring scheduler functionality.

Manage Profiles

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

Schedule for Replication

Command

clean copy

Runs

Every 15 Min

Save



Job Name	Expression	Next Run Time	Action
config/clean copy	0 0/15 * * * ? *	Thu Feb 21 02:00:00 CST 2013	Delete