

7. Database to Salesforce

DBSync Replication tool facilitates Database to Salesforce Replication using Control Flag (do_sync_flag) as shown below. Use of do_sync_flag is illustrated in detail with example in the topic [do_sync_flag](#).

Run Process	Actions Performed
Database to Salesforce (By Control Flag)	Identifies changes in the Database and updates Salesforce records based on the database column Do_Sync_Flag at tributes. This process is not compatible when Cassandra Database is used for replication.

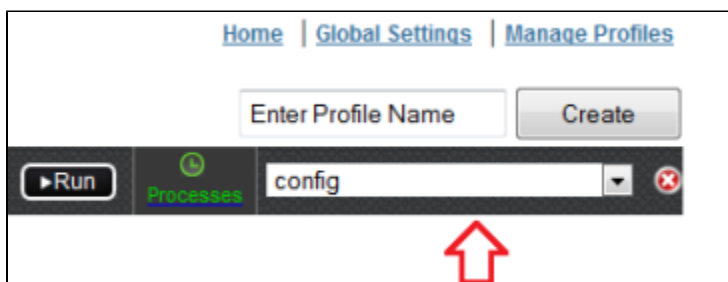
Database to Salesforce Synchronization can be performed in the same profile where in Salesforce to Database Replication is configured. This section explains the step by step process.

- 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.



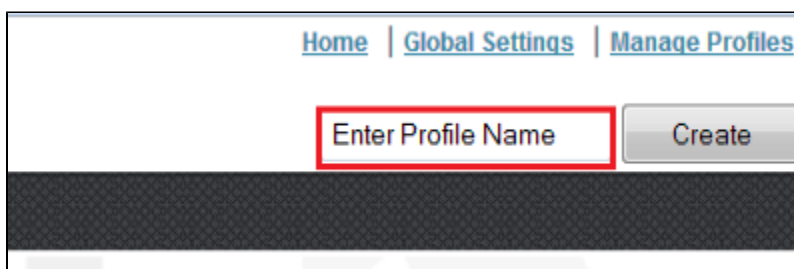
The screenshot shows the 'Global Settings' section of the DBSync Replication 3.0 console. Under the 'Proxy Settings' tab, there are four input fields: 'Proxy Host', 'Proxy Port', 'Proxy UserName', and 'Proxy Password'. A 'Save' button is located at the bottom right of the form. A banner at the top states: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

- 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 top navigation bar with links for 'Home', 'Global Settings', and 'Manage Profiles'. Below the navigation bar, there is a section for creating a new profile with an 'Enter Profile Name' text box and a 'Create' button. Below this, there is a 'Run' button, a 'Processes' tab, and a dropdown menu showing 'config'. A red arrow points to the 'config' 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.



The screenshot shows the top navigation bar with links for 'Home', 'Global Settings', and 'Manage Profiles'. Below the navigation bar, there is a section for creating a new profile with an 'Enter Profile Name' text box and a 'Create' button. The 'Enter Profile Name' text box is highlighted with a red rectangle.

- 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.

This is a Beta Version. If any issue are found kindly email to [support@dbsync.com](#)

db sync 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 :

Test Connection Save Next

- 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.

- 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 from Database from the Objects section as shown below.

Manage Profiles

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

☐ All

☐ Account

☐ Contact

☐ User

- Select the object fields you want to sync from Database from the **Available Fields** section and use **Exclude Fields** section to filter out fields that you don't want to sync from 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

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

Fields Count: 43

Exclude Fields

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

IsDeleted
MasterRecordId
Name
Type
ParentId
BillingStreet
BillingCity
BillingState
BillingPostalCode
BillingCountry
ShippingStreet
ShippingCity
ShippingState
ShippingPostalCode
ShippingCountry
Phone
Fax
AccountNumber
Website
NumberOfEmployees

Fields Count: 47

Exclude Fields

Sic
Industry
AnnualRevenue

Fields Count: 3

-->
<--
>>
<<

Save

Filter Criteria:

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

SaveNext

- 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.
- Include required control flags in the column do_sync_flag of Database table where in SF data is already stored during previous runs for Salesforce to Database Replication. Selection of control flags shown in the below table is illustrated with example in the topic [do_sync_flag](#).

Values	Description
Y	The record has been synchronized between Salesforce.com and Database
S	A request from an external system to indicate that the record needs to be synchronized from Database to Salesforce.com
D	Indicates that the record was deleted in Salesforce.com

- Screen capture shows selected control flags.

sync_id	sf_update_timestamp	do_sync_flag	merge_id	sfId	sfIsDeleted	sfMasterRecordId	sfAccountId	sfLastName	sfFir
1	2013-06-06 00:00:00	Y	(NULL)	0039000000HxeEFAAJ	false	(NULL)	0019000000HxeEFAAJ	Gonzalez	Rose
2	2013-06-06 00:00:00	Y	(NULL)	0039000000HxeEFAAJ	false	(NULL)	0019000000HxeEFAAJ	Forbes	Sean
3	2013-06-06 00:00:00	S	(NULL)	0039000000HxeEFAAJ	false	(NULL)	0019000000HxeEFAAJ	Rogers	Jack
4	2013-06-06 00:00:00	Y	(NULL)	0039000000HxeEFAAJ	false	(NULL)	0019000000HxeEFAAJ	Barr	Tim
5	2013-06-06 00:00:00	S	(NULL)	0039000000HxeEFAAJ	false	(NULL)	0019000000HxeEFAAJ	Bond	John
6	2013-06-06 00:00:00	Y	(NULL)	0039000000HxeEFAAJ	false	(NULL)	0019000000HxeEFAAJ	Pavlova	Stella
7	2013-06-06 00:00:00	Y	(NULL)	0039000000HxeEFAAJ	false	(NULL)	0019000000HxeEFAAJ	Boyle	Laurer
8	2013-06-06 00:00:00	S	(NULL)	0039000000HxeEFAAJ	false	(NULL)	0019000000HxeEFAAJ	Levy	Sabara
9	2013-06-06 00:00:00	Y	(NULL)	0039000000HxeEFAAJ	false	(NULL)	0019000000HxeEFAAJ	Davis	Josh
10	2013-06-06 00:00:00	Y	(NULL)	0039000000HxeEFAAJ	false	(NULL)	0019000000HxeEFAAJ	Grey	Jane
11	2013-06-06 00:00:00	Y	(NULL)	0039000000HxeEFAAJ	false	(NULL)	0019000000HxeEFAAJ	Song	Arthur
12	2013-06-06 00:00:00	D	(NULL)	0039000000HxeEFAAJ	false	(NULL)	0019000000HxeEFAAJ	James	Ashley
13	2013-06-06 00:00:00	Y	(NULL)	0039000000HxeEFAAJ	false	(NULL)	0019000000HxeEFAAJ	Ripley	Tom
14	2013-06-06 00:00:00	Y	(NULL)	0039000000HxeEFAAJ	false	(NULL)	0019000000HxeEFAAJ	D'Cruz	Liz
15	2013-06-06 00:00:00	Y	(NULL)	0039000000HxeEFAAJ	false	(NULL)	0019000000HxeEFAAJ	Frank	Edna

- 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.



- 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