

f. Log Event Notification

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, DB2, PostgreSQL, Cassandra, Redshift, 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](#).

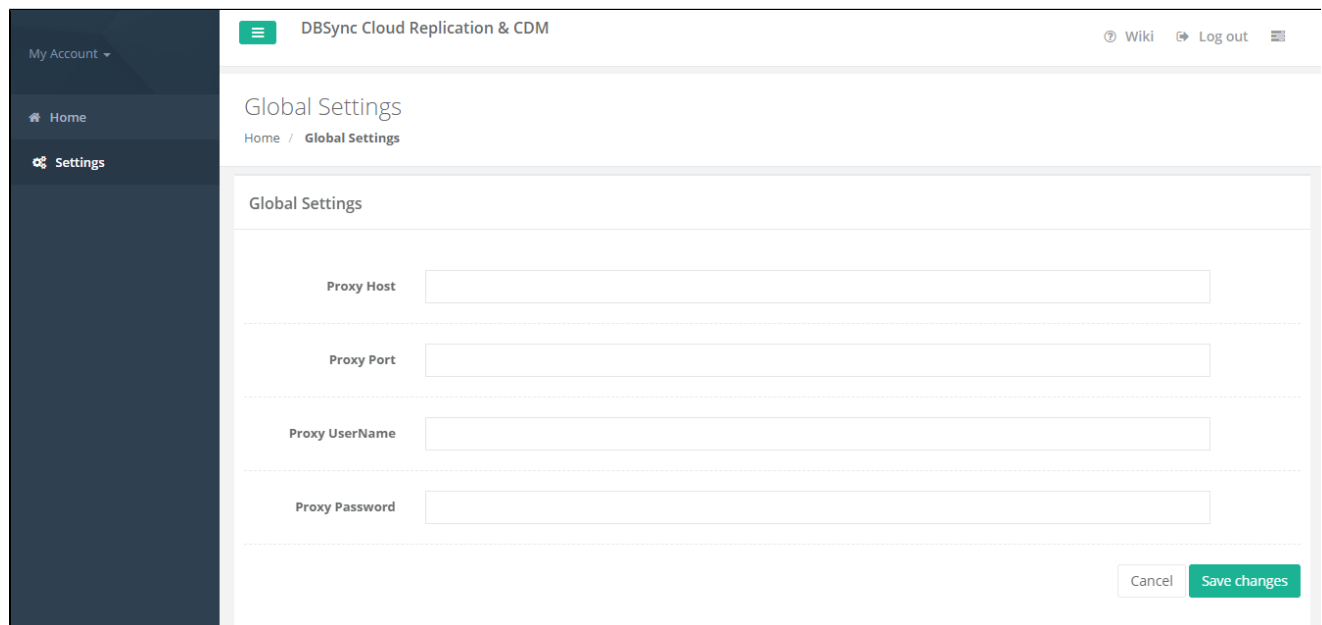
Fill the configuration details in global settings

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**.

Figure:1



The screenshot displays the 'Global Settings' page in the DBSync Cloud Replication & CDM portal. The interface includes a dark sidebar on the left with a 'My Account' dropdown, 'Home' (with a house icon), and 'Settings' (with a gear icon). The main content area has a header with a hamburger menu icon, the title 'DBSync Cloud Replication & CDM', and links for 'Wiki' and 'Log out'. Below the header, the page title 'Global Settings' is shown with a breadcrumb 'Home / Global Settings'. The settings form contains four labeled input fields: 'Proxy Host', 'Proxy Port', 'Proxy UserName', and 'Proxy Password'. At the bottom right of the form, 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 DBSync Replication platform.

Follow these steps to create a profile under source application like Salesforce and Microsoft CRM.

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

Figure:2

The figure shows two instances of the 'Add Profile' dialog box. In the first, the 'Product' dropdown is set to 'Salesforce' and the 'Name' field contains 'testprofile'. In the second, the 'Product' dropdown is set to 'MSCRM' and the 'Name' field also contains 'testprofile'. Both dialogs have 'Close' and 'Save changes' buttons at the bottom right.

Source application setup details

Start with source application setup details includes Salesforce and Microsoft CRM.

The source setup applications 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.

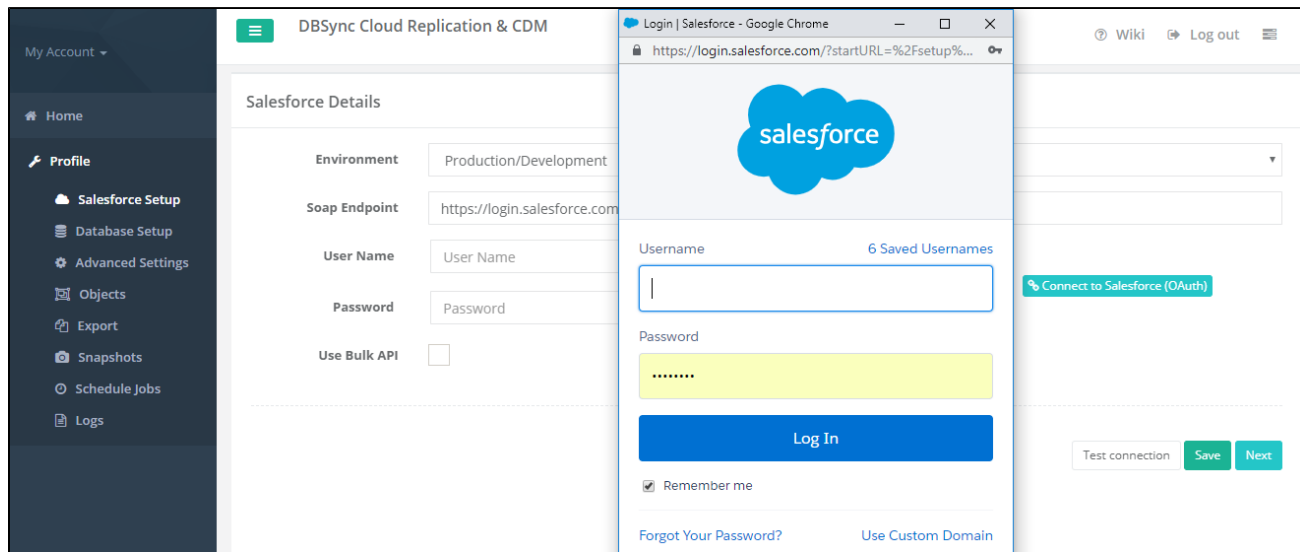
1. Click to "**Salesforce and Microsoft CRM**" **setup tab** on the left hand corner in the profiles section of DBSync Replication portal.
2. Don't change the "**environment and soap end details**", all these details are pre-filled.
3. Next, enter the "**username**" and "**password**" **credential for Salesforce and Microsoft CRM**.

Figure:3

The figure displays two screenshots of the DBSync Cloud Replication & CDM interface. The top screenshot shows the 'Salesforce Details' setup page. It includes a sidebar with navigation options like 'Home', 'Profile', 'Salesforce Setup', 'Database Setup', 'Advanced Settings', 'Objects', 'Export', 'Schedule Jobs', and 'Logs'. The main content area has fields for 'Environment' (Production/Development), 'Soap Endpoint' (https://login.salesforce.com/services/Soap/u/42.0), 'User Name', 'Password', and a 'Use Bulk API' checkbox. There is also a 'Connect to Salesforce (OAuth)' button. The bottom screenshot shows the 'MSCRM Details' setup page, which has similar fields for 'Soap Endpoint', 'User Name', and 'Password'. Both screenshots have 'Test connection', 'Save', and 'Next' buttons at the bottom right.

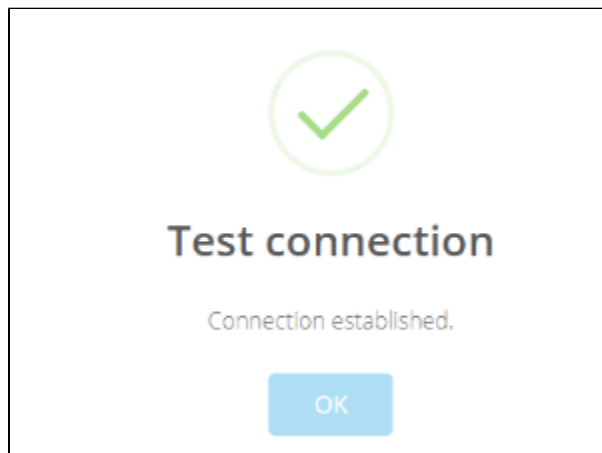
4. **"OR", "Other option for salesforce"** click on connect to **Salesforce (OAUTH)** to enter Salesforce login credentials like **"username"** and **"password"** to connect the salesforce application.

Figure:4



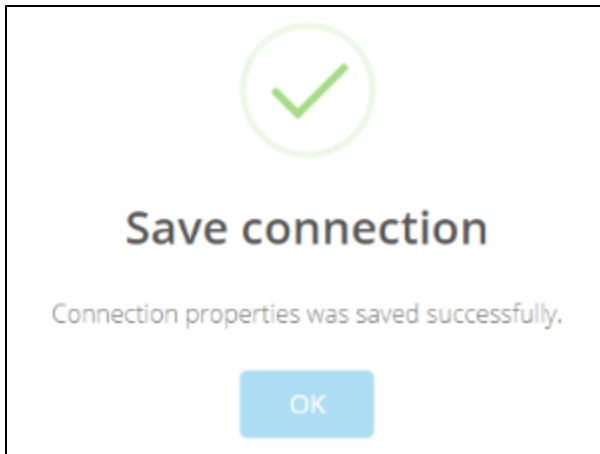
5. Click on **test connection button** to validate your source application login details.

Figure:5



6. Click on **save button** to save your source apps login details.

Figure:6



7. Once completed, click on **next button to proceed to database setup tab.**

Advanced settings tab details

Start with **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 DBSync replication portal.
2. Mark the checkbox to **"enable database logging"** to create 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 **"email recipient"** to get the notification when any run command is executed.
5. Click on **save button to save your advanced settings details.**
6. Once the process is completed then click on **save and next button to proceed further.**

Figure:8

7. When the replication is performed **notification email** will be sent which will have the notification details as shown below.

Figure:9

Salesforce.com to DB Sync Report : [MySQL] Thu Jul 11 12:56:47 CDT 2013

Database side activity:

Command:cleanCopy

DBSync Standard Edition

Table Name	Updated	Inserted	Deleted	Errors
User	0	0	0	
Contact	0	0	0	
Account	0	11	0	

Time taken for Replicating:4 sec

Time taken with Salesforce calls:2438 milli sec

Time taken with Database calls:171 milli sec

dbsync version:3.0.14b

8. If Database Logging is enabled, *SF LOG_C* table will be auto created in the database which will have useful

details like timestamp and the log details as shown below.

Figure:10

