

Salesforce Setup

Setup Salesforce instance

To set up your Salesforce instance follow the steps below:

- Login to DBSync Cloud Replication instance
- Select the desired profile and click connect to Salesforce

Following fields are auto filled:

- Environment and Soap Endpoint
- A pop-up asking for your Salesforce credentials will appear on the screen
- Provide the login credential and click Log In

The User Name and Password fields are automatically populated

The screenshot displays the 'Salesforce Details' configuration page in a web application. The interface includes a top navigation bar with tabs: Salesforce, Database, Objects, Metadata, Schedule Jobs, Notification, and Logs. A left sidebar contains icons for various settings. The main content area is divided into two sections: 'Salesforce Details' and 'Advanced Settings'.

Salesforce Details:

- Environment:** A dropdown menu showing 'Production/Development'.
- Soap Endpoint:** A text field containing 'https://avankia-ac-dev-ed.my.salesforce.com/services/Soap/u/54.0'.
- User Name:** A text field containing 'tiwary@avankia.com'.
- Password:** A text field containing 'Password'.
- Use Bulk API:** An unchecked checkbox.

Advanced Settings:

- Incremental Update Time Offset:** A dropdown menu is open, showing options: 'Select', 'Seconds' (highlighted), 'Minutes', and 'Hours'. To the right, a text field contains '0'. A note below states: 'Maximum incremental offset limits to 23 hours'.
- Salesforce API Calls Usage Limit:** A text field containing '100000'.
- Salesforce Objects Type:** A dropdown menu showing 'Replicable'. Below it, a note states: 'These are Salesforce objects that have bi-directional sync and support both clean copy and incremental replication.'

- You can configure the advanced settings to include:
 1. **Incremental update time offset**

To retrieve the latest data from Salesforce use this setting. The timeframe that is specified in this field will work as an offset to the actual SystemModStamp/LastModifiedDate/CreateDate timestamp. Select a desired time field from the drop-drop option: seconds, minutes or hours. The latest delta changes are displayed using one of these three time fields. Also specify the number of incremental offset limits.

Note: The maximum incremental offset limit is 23hours.
 2. **Salesforce API Calls Usage Limit**

Use this field to set the limit on the number of API calls allowed during replication
 3. **Salesforce object type**

Select the object type as 'Replicable' or 'Non-Replicable' . These are Salesforce objects that have bi-directional sync and support both clean copy and incremental replication
- You can test and Save your connection.