

User Interface

DBSync Cloud Replication User Interface can be used to run the replication. Step by step process is shown in this section.

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](#).

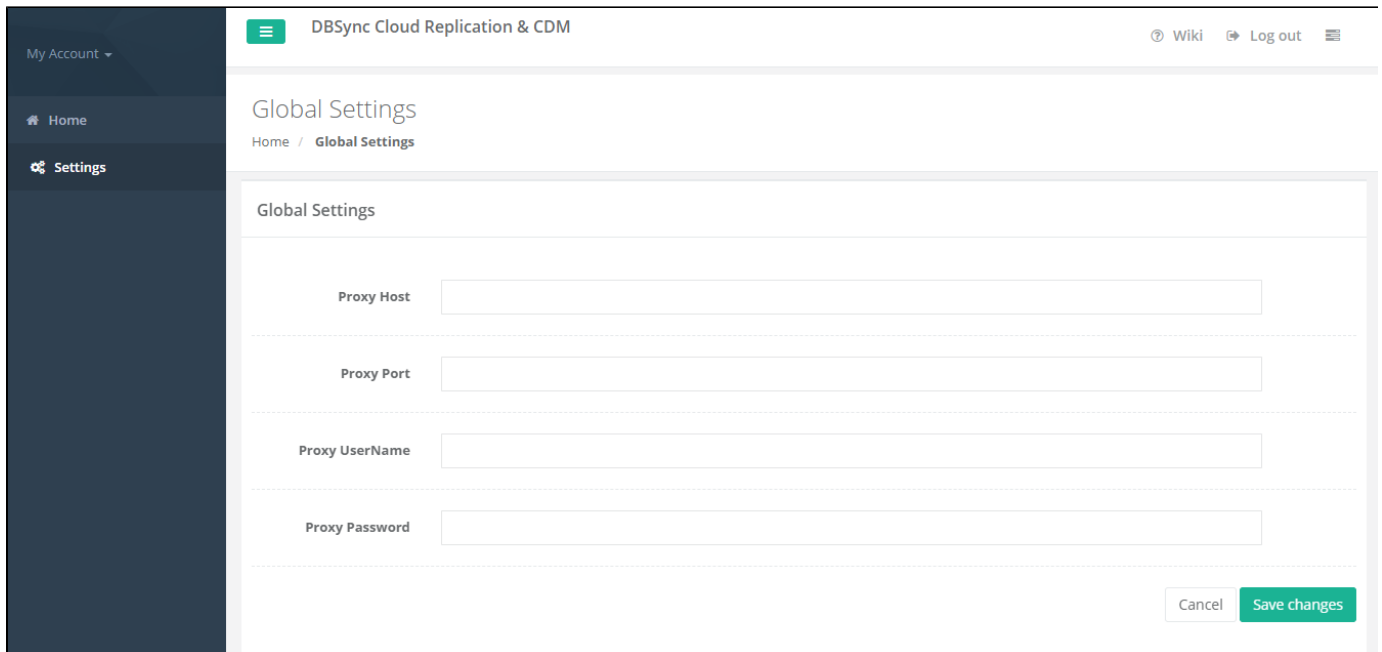
Fill the configuration details in global settings

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 DBSync Cloud Replication & CDM user interface. On the left is a dark sidebar with a 'My Account' dropdown, and links for 'Home' and 'Settings'. The top header bar shows the application name and links for 'Wiki' and 'Log out'. The main content area is titled 'Global Settings' with a breadcrumb 'Home / Global Settings'. Below this, there's a section for 'Global Settings' containing four text input fields labeled 'Proxy Host', 'Proxy Port', 'Proxy UserName', and 'Proxy Password'. At the bottom right of this section are two buttons: 'Cancel' and 'Save changes'.

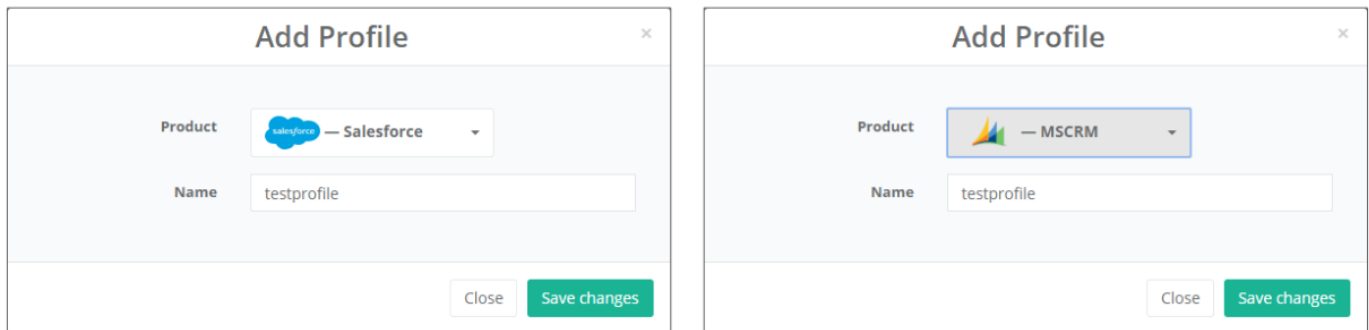
Create a source application profile

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



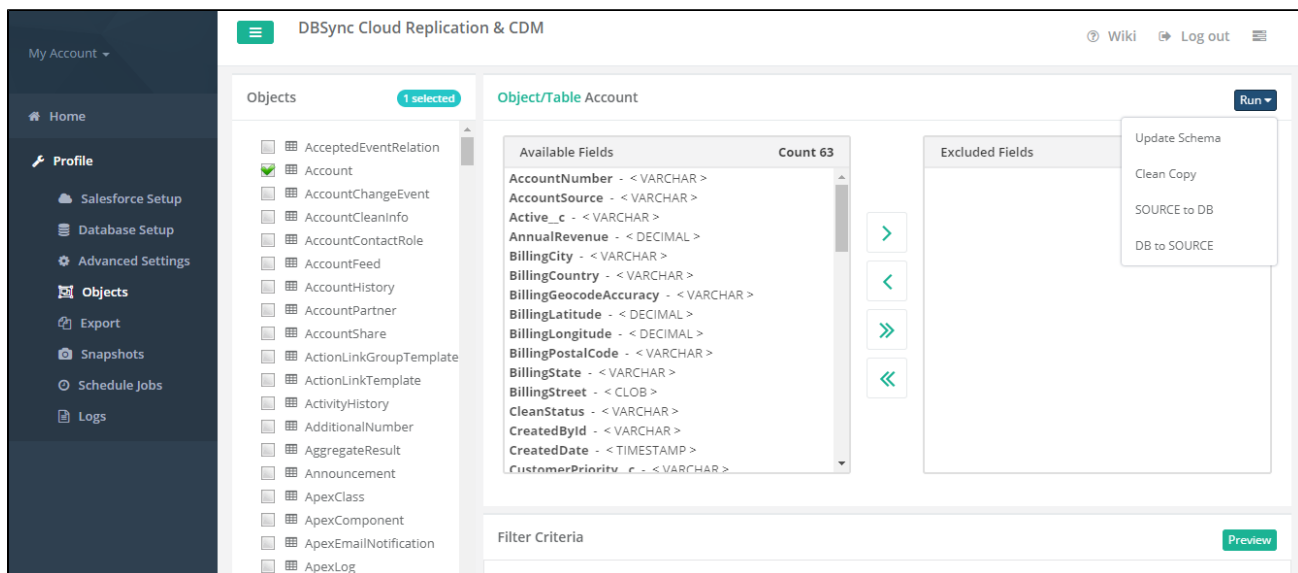
Source application objects tab

Start with Source Application Objects tab, to get synced all the objects when user will get connected to different source applications like Salesforce and Microsoft CRM.

Follow these steps to synced all objects for source application like Salesforce and Microsoft CRM.

1. Click to **"objects" tab** on the left hand corner in the Profiles section of DBSync replication portal.
2. Once, user has connected to source applications like Salesforce and Microsoft CRM then objects will get synced and it will show on the objects tab.
3. Once completed, click on the **"run button"** to Run the configuration for the **source apps object**.

Figure:3



4. Run menu to select the required commands like **update database schema**, **source apps to database (Clean Copy)**, **source apps to database (Incremental)** to execute.
As per the above commands here user has to **select the Clean copy and Source to Database command to replicate all the sync objects to their database**.
5. Initiate the sync using the **Run** menu to select the required mode of Replication to execute.
6. Once user has selected and **"Run"** the Command, then it will redirect to user on the **log screen tab** to see the status of command is completed or not.

Configure schedule jobs tab

Start with Scheduler Jobs tab, here users can schedule the sync using Scheduler Tab.

Follow these steps to schedule the sync using Scheduler tab with scheduler functionality like run commands options, Date, Month and year format settings and repeat Drop-down menu details to set the desired duration to sync the selected objects.

1. Click to **"scheduler jobs" tab** on the left hand corner in the Profiles section of DBSync replication portal.
2. Once, user has connected to source applications like Salesforce and Microsoft CRM then objects will get synced and user can directly select the required process from the command drop-down and configure the frequency of the sync by selecting a desired duration from the **Repeat drop-down menu**.
3. Next, **"start on"** option to select the **date, month and year** from the **drop-down menu** to get the objects synced for particular Date and Month format.
4. Create a task in the **"task section"** with all the details including **task name, action, command and start, date and time**.
5. Once the process is completed then click on **save and next button to proceed further**.

Figure: 4

The screenshot displays the DBSync Cloud Replication & CDM interface. On the left is a dark sidebar with navigation links: My Account, Home, Profile, Salesforce Setup, Database Setup, Advanced Settings, Objects, Export, Schedule Jobs (highlighted), and Logs. The main content area is titled 'Schedule Jobs' and contains a form with the following fields: 'Command' (a dropdown menu showing 'Update Schema'), 'Repeat' (a dropdown menu showing 'No Repeat'), 'Starts On' (a date picker showing '12/12/2018'), and a time field showing '05:10'. There are 'Save' and 'Cancel' buttons at the bottom right of the form. Below the form is a 'Tasks' section with a table header: Task Name, Repeat, Start Date Time, Next Fire Date Time, Command, and Actions. The table body is currently empty.