

Scheduler

DBSync Cloud Replication facilitates Replication to be scheduled as per the requirement. Below section helps with the steps involved in Scheduling.

Log in to the DBSync replication portal

Sign in to the [DBSync Replication portal](#).

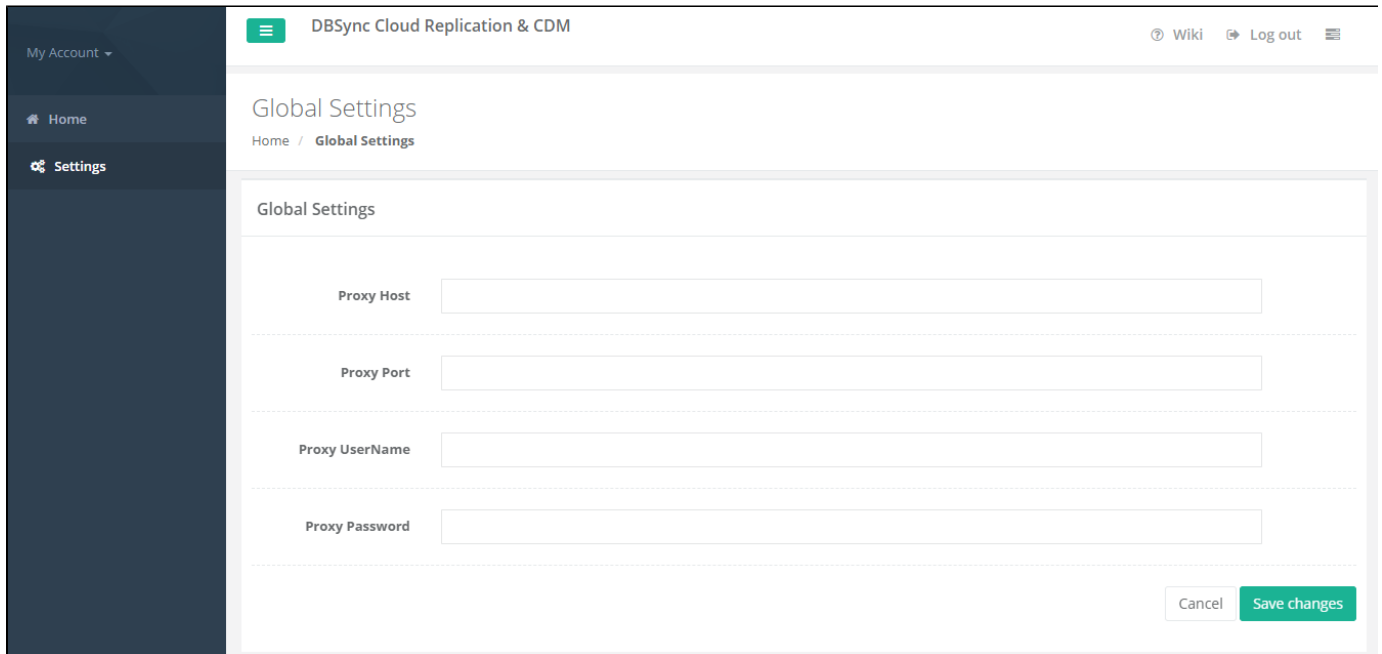
Fill the configuration details in global settings

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 and links to 'Home' and 'Settings'. 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'.

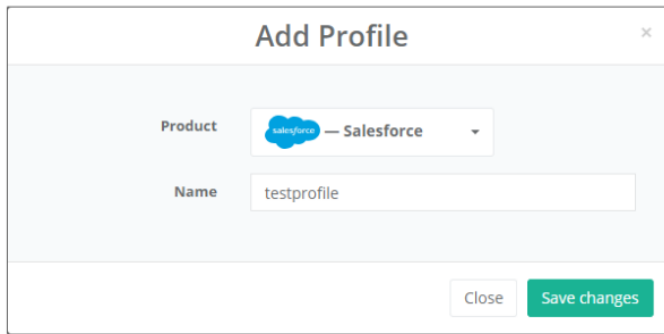
Create a source application profile

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




Add Profile

Product: salesforce — Salesforce

Name:

Close Save changes



Add Profile

Product: MSCRM — MSCRM

Name:

Close Save changes

Source application setup details

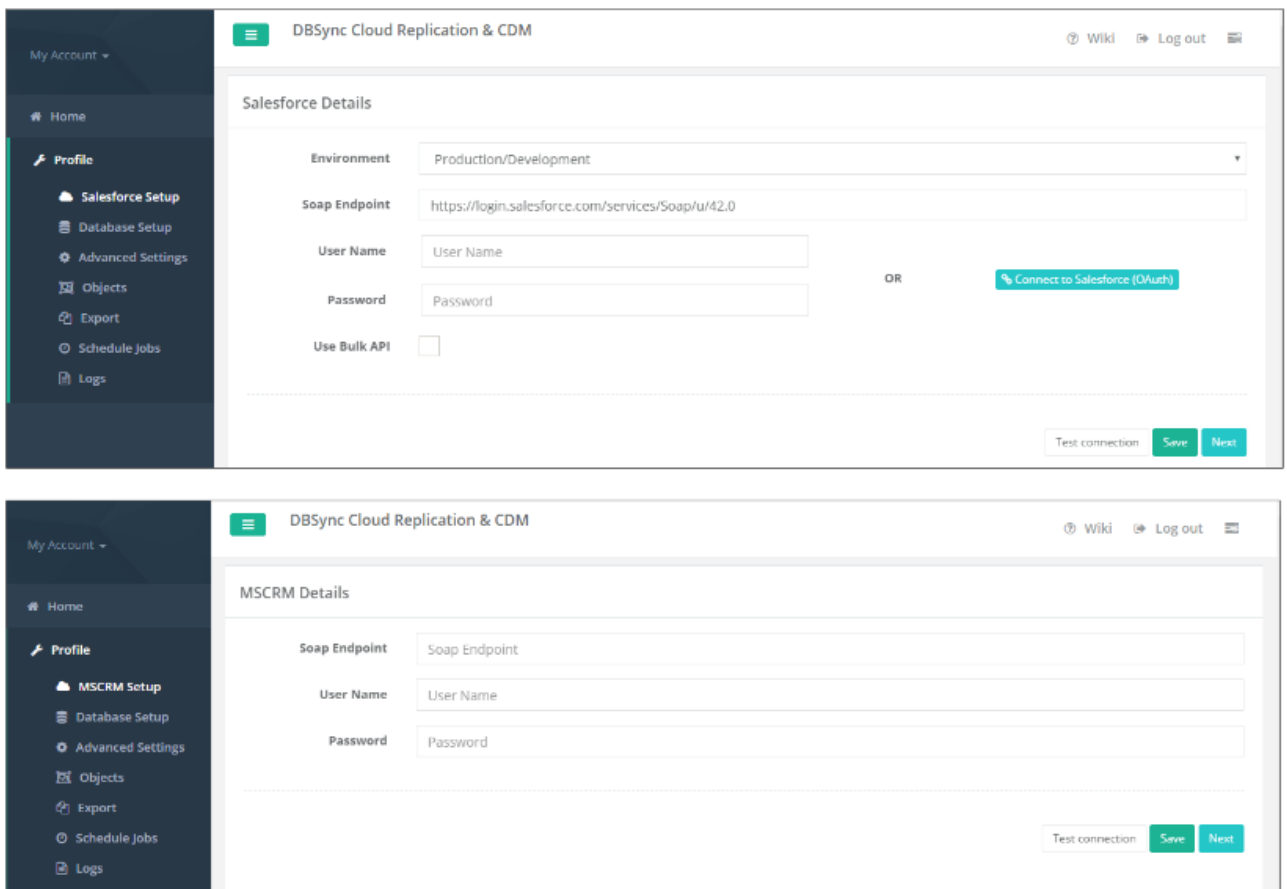
Start with source application setup details includes Salesforce and Microsoft CRM.

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**.

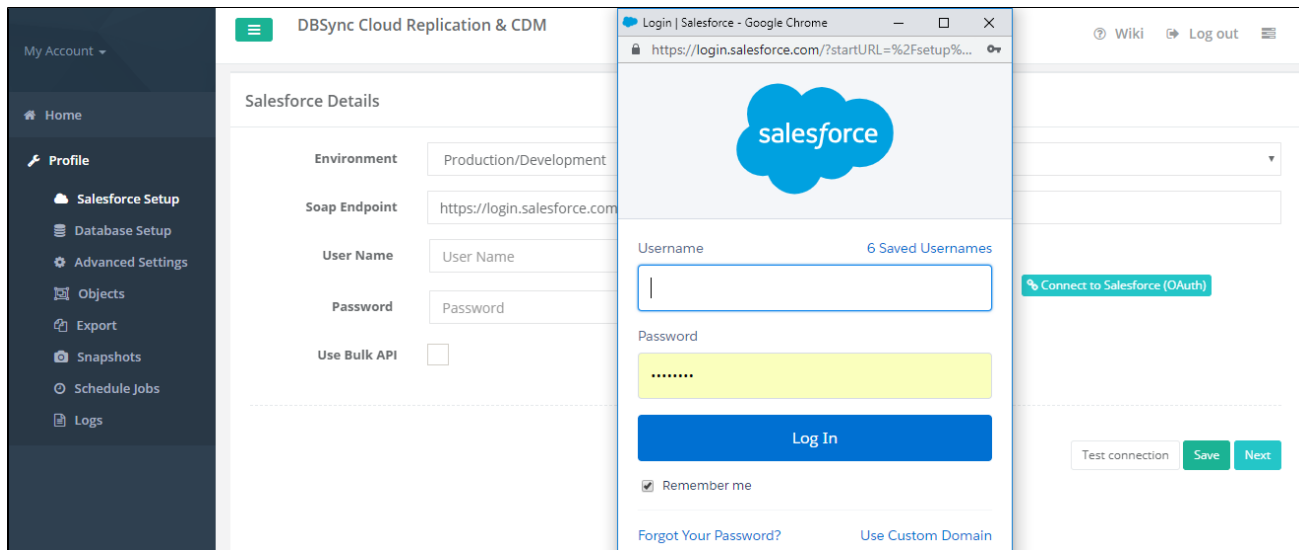
Figure:3



The figure shows two screenshots of the DBSync Cloud Replication & CDM interface. The top screenshot displays the 'Salesforce Details' setup page. It includes a sidebar with navigation options: My Account, 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 checkbox for Use Bulk API. There is an 'OR' option and a 'Connect to Salesforce (OAuth)' button. At the bottom, there are 'Test connection', 'Save', and 'Next' buttons. The bottom screenshot displays the 'MSCRM Details' setup page, which has similar fields for Soap Endpoint, User Name, and Password, along with 'Test connection', 'Save', and 'Next' buttons.

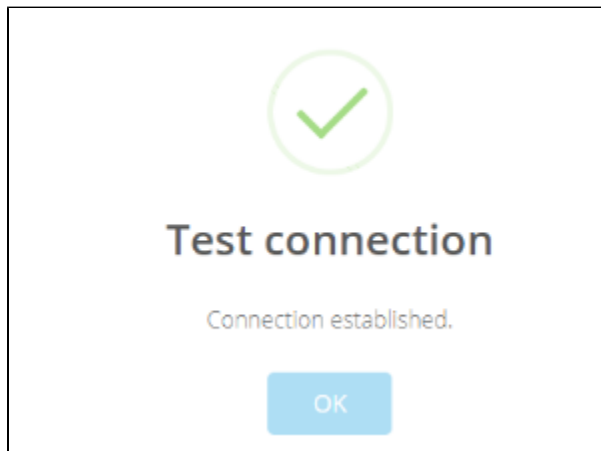
4. "**OR**", "**Other option for salesforce**" click on connect to **Salesforce (OAUTH)** to enter Salesforce login credentials like "**username**" and "**password**" to connect the salesforce application.

Figure:4



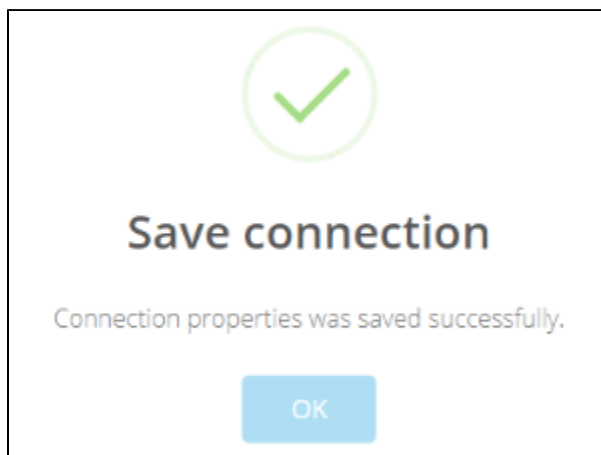
- Click on **test connection button** to validate your source application login details.

Figure:5



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

Figure:6



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

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 button to proceed further**.

Figure: 7

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'), 'Starts On' (a date picker showing '12/12/2018'), and 'Repeat' (a dropdown menu showing 'No Repeat'). There are also time selection fields showing '05:10'. 'Save' and 'Cancel' buttons are located 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.