Salesforce Setup

Setup Salesforce instance

To set up you 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 Salsforce credentials will appear on the screen

- Provide the login credential and click Log In

The User Name and Password fields are automatically populated

- 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/CreatedDate 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 'Replicatable' or Non-Replicatable' . These are Salesforce objects that have bi-directional sync and support both clean copy and incremental replication
- You can test and Save your connection.