

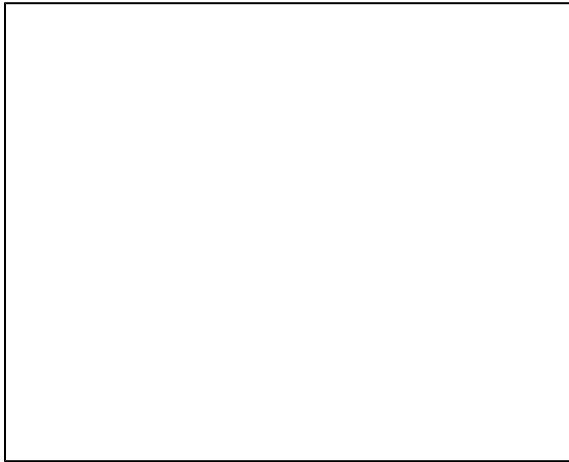
Export and Export Child

Introduction:

DBSync Export functionality enables the user to restore all the changes made in the Salesforce instance to the original status as reflected in the database. User can restore the entire information to reflect the database if any errors were made. Users might be performing various changes to a number of Accounts in the Salesforce instances and there is a chance that such information might be an error or not required or dated in which case it must not affect the User.

Steps to Run Export Functionality:

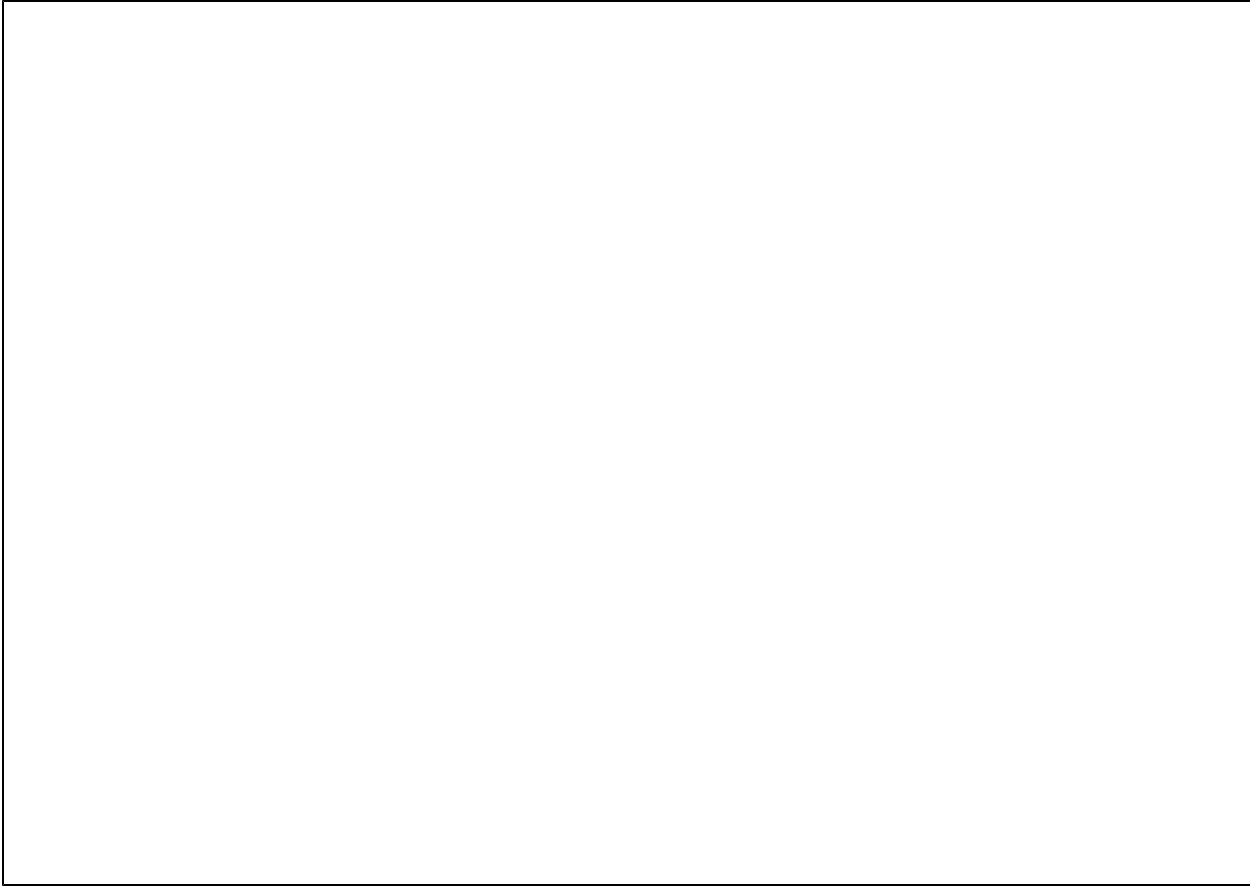
- Login to DBSync Cloud Replication instance



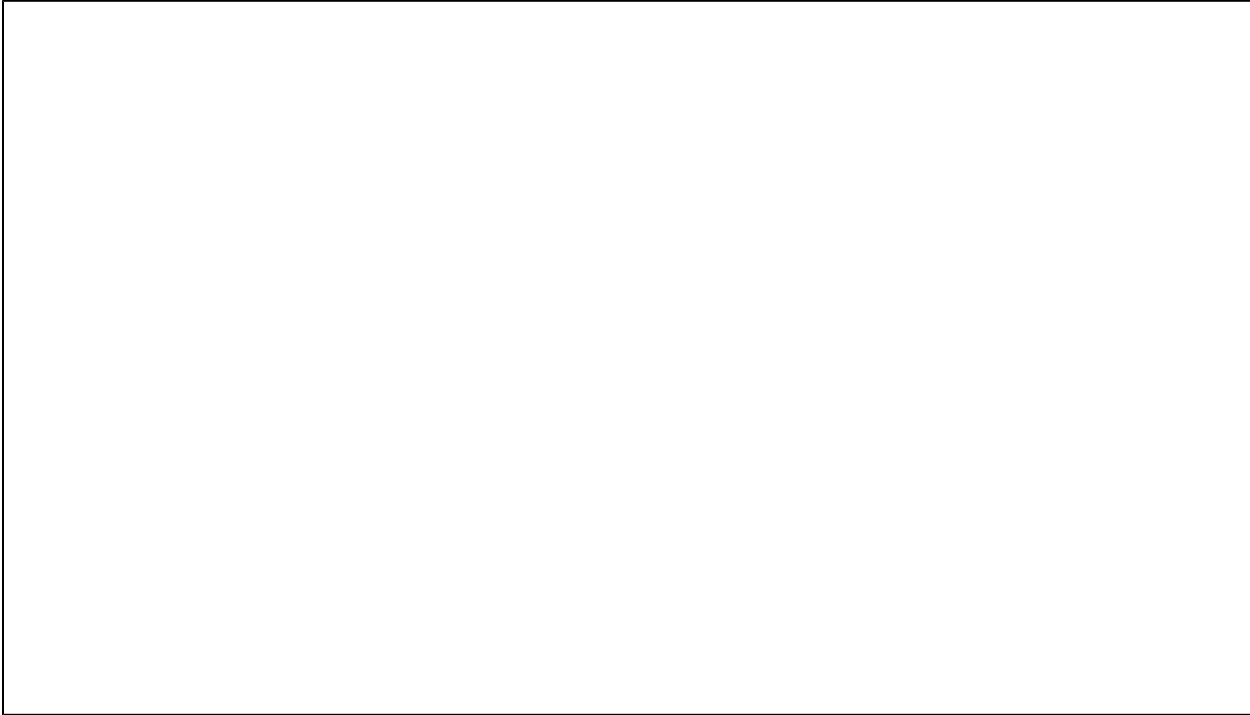
- Select the desired profile



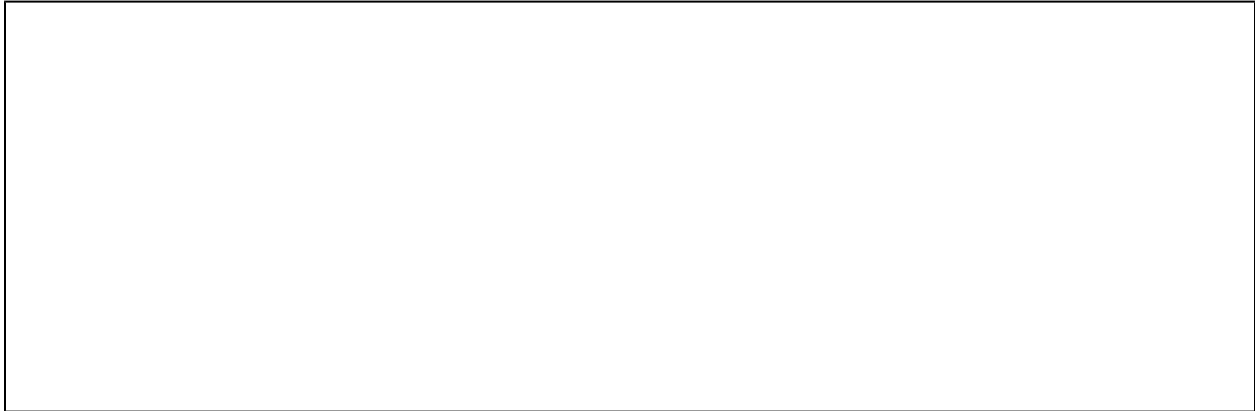
- Connect to Salesforce



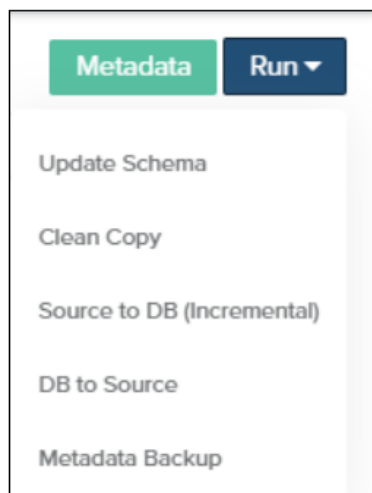
- Connect to Database



- Select an Object from the Objects tab by clicking the check box next to it.



- Click Run and from the drop-down menu select the functionality you want to perform

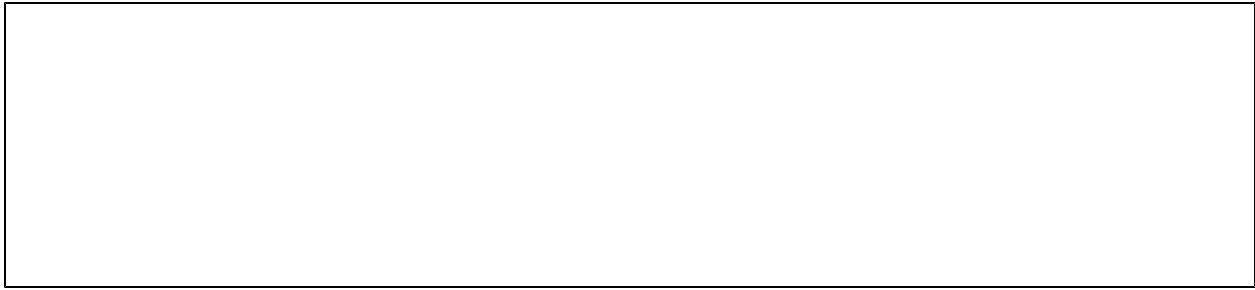


For this example let us consider: Clean Copy

1. You will be redirected to the LOGS screen where you can check the status



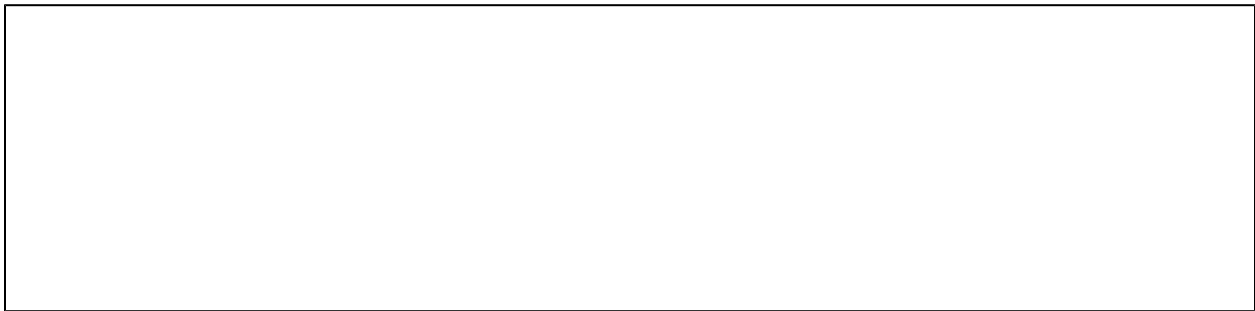
2. Click on EXPORT from the top navigation toolbar



- From the left panel under SCHEMA click the check boxes for selecting the various schema you want. The Query builder will consider all these variables for creating a table.
- Click on RUN



3. The list of all the columns in the database will appear in a table format as shown below:

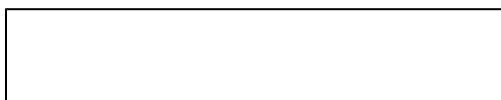


This table has details of all accounts from the database

- Now if any changes are made to any account in the Salesforce instance you can update that information directly by running the UPDATE command. This will update the information newly added into the Account in the Salesforce instance in the database.
- Click the checkbox next to the account name which you want to update the new information which has been added to the Salesforce instance.



4. Click UPDATE



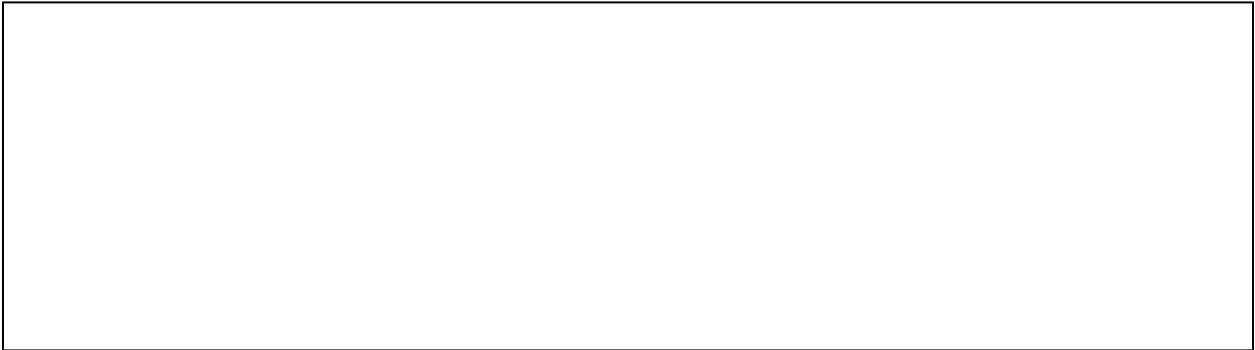
For example: let us consider the following:

Changes have been made to the contact information: Phone number into the once of the accounts. When you click the checkbox next to the account and click UPDATE the information will get updated into the database

- The list of account changes made will appear in the table section. Select the check box next to it and Click Refresh



- The number of records which were updated will appear in the table section below the query builder as shown below:



- Once you click REFRESH the Salesforce instance for that account will get RESTORED to the actual details reflected in the database.
- For example: Refresh the Salesforce instance and you will see that the contact information will be updated into the original details that was in the database for that account.

EXPORT CHILD:

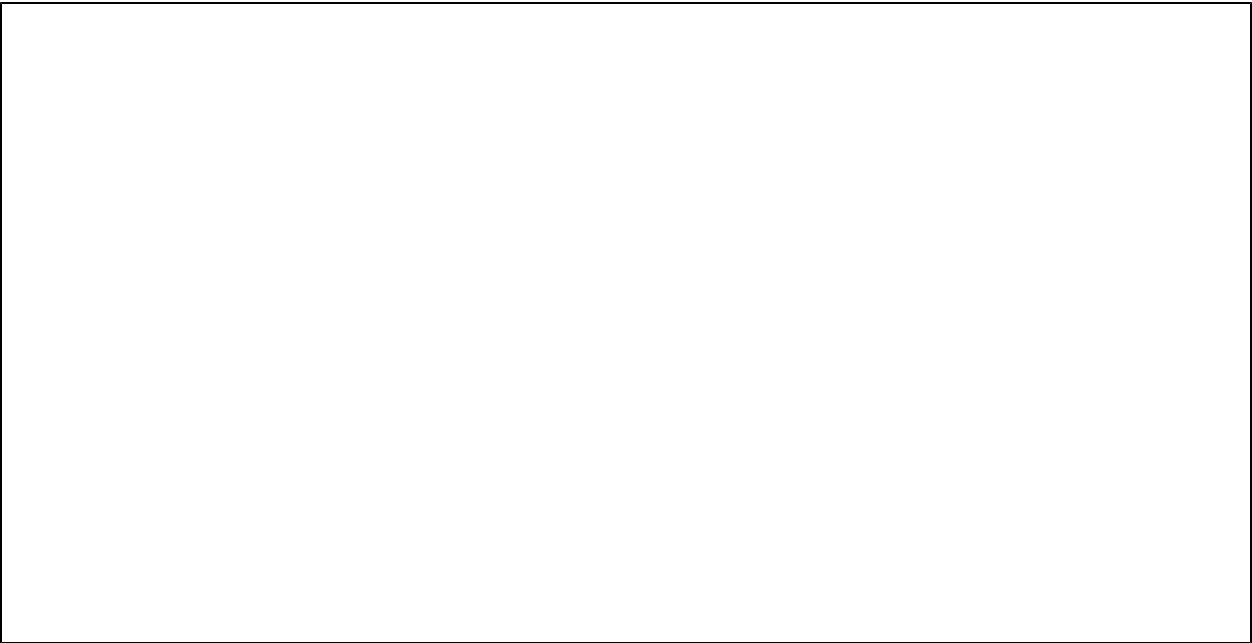
This functionality is used when restoring more than one record from more than one interlinked account. One value change in account that is interlinked with opportunity and contact the change will reflect in all instance and restore will be done in all instance at once.

Also if you want to match the fields from one Salesforce instance to another and match all fields in all account Export Child can be used.

For doing export child first a clean copy and export functions must have been run

Continue the below steps:

1. Click on Export in the table section
2. A pop-up window with 4 tabs will appear on the screen:
 - Source Metadata
 - This section will show all the accounts and the child items listed in a tree structure
 - Click **NEXT**
 - In this example the below will appear:



- Target Profile
- Select the target profile (the Salesforce instance that you want to Match)
- Click the check box next to deleted records if you want to update these in database
- Select the Profile for which you want to perform this function from the drop-down menu
- **Incremental export**- Select this option in order to incrementally export the data from Production to Sandbox instance. This option supports to create an incremental copy of the data during export.

Target Profile

1. Source Metadata 2. Target Profile 3. Validate 4. Notification

☒ Incremental Export

☐ Include Deleted Records

Select existing Profile

Select Profile ▼

Create a Profile

Previous Next

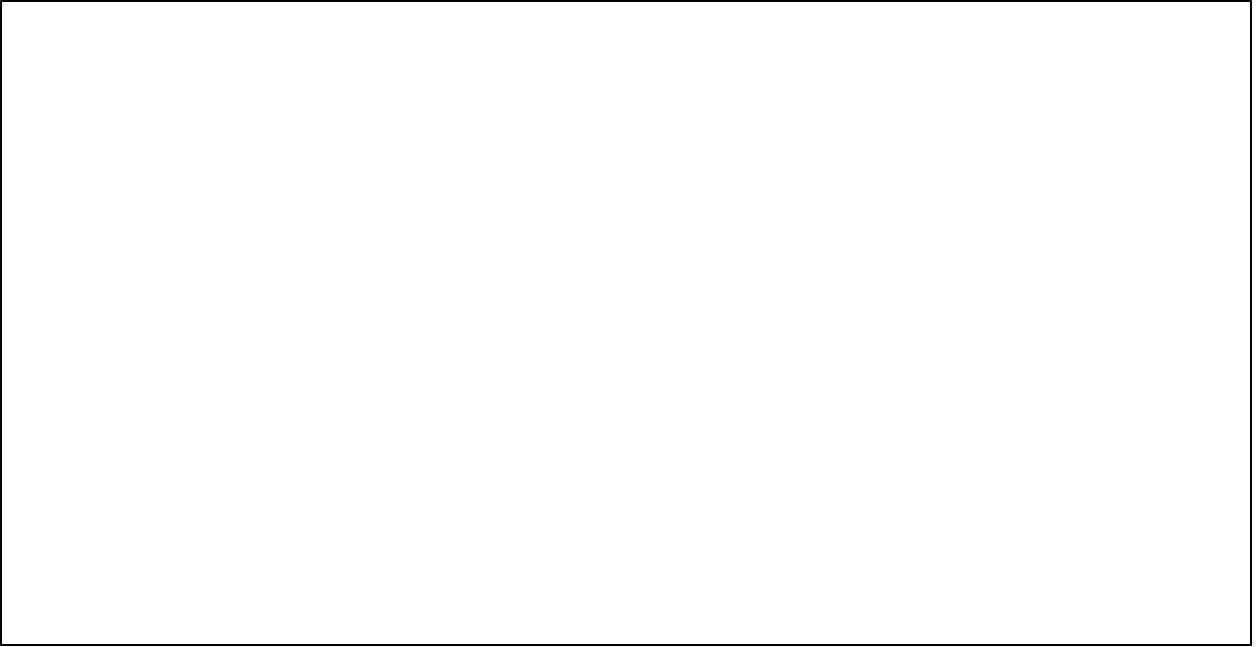
- Click the check box next to Update existing database



- Click NEXT
- Validate
- This step will validate all the records and provide a description of all changes made.
- The functionality will include interpreting and extracting the schema from the Salesforce instance and Matching fields of Account. If any missing fields are found it will also be listed in this section.
- A confirmation mentioning that validation is finished will appear on the screen



- Click NEXT
- Notification
- In this table enter details of the email id which you need the notification to be sent. The Export report will be sent to this email id



- Click EXPORT
- A pop-up confirming the export will appear on the screen

