



Sandbox Advanced Options And Sync Filtering

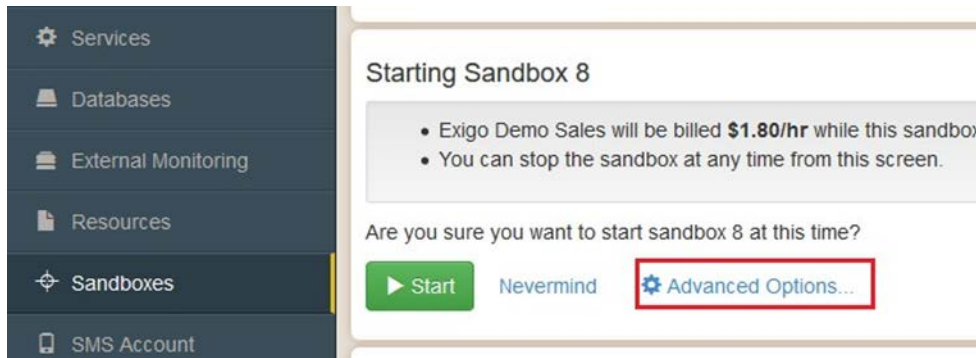
v1.0

Sandbox Advanced Options and Sync Filtering

HOW TO USE:

A. CLIENT PORTAL SANDBOXES:

- When starting a Sandbox, clients will have filtering on by **DEFAULT** with max days set to 90. To **change** that value or disable filtering, click on **“Advanced Options”**.



- You will have the option of disabling the filter by unchecking **“Filter Sync with...”** OR **changing the amount of days**. The days are how many days of data will synced for the **Commission** and **Order Table Groups**. See **Table Filtering Groups table** below for all tables affected by this.
- Directly above the aforementioned option, users will also see a list of **available sync settings** in snapshot that can be applied. Look for **“Enable Sync going to <server-name>”**.



- NOTE: If there is more than one sync server available and they are enabled, they all get the SAME value seen in **“Filter Sync with last x days of data”**. For more control, visit the **Sync Management** section.

B. CLIENT PORTAL SYNC MANAGEMENT:

1. **Editing filters can ONLY be done on Sandbox systems.** The production environment doesn't have this capability yet. To edit the filters, click on **"Sync Management"** via the **navigation menu** and change the Source to the desired Sandbox.
2. A new blue button will appear called **"Manage Sync Filters"**. Select that.
3. Select the **Sync setting** you'd like to edit the filters on.
4. Edit Filters.

Manage Sync Filters

Server Name

Allow Filtering

WARNING: If you DESELECT a table group below, ALL data contained within that group's tables will be deleted from your replicated DB.

Include Table Groups:

- AutoOrder Tables
- Commission Tables**
 Optional Filter(s):
 Only include Commission Tables within the last days
- Core Tables**
- Customer Tables**
- CustomersExtended Tables
- Image Tables
- Item Tables**
- Log Tables
- Messaging Tables
- Order Tables**
 Optional Filter(s):
 Only include Order Tables within the last days
- Payout Tables
- Tree Tables**
- User Tables

Save Changes
Close

Table Filtering Groups and associated tables

Table Group	Enabled/Disabled (Defaults)	Tables in group
AutoOrder	Enabled	1. AutoOrder 2. AutoOrderPaymentType 3. AutoOrderProcessType 4. AutoOrderStatus 5. FrequencyType

Core	Enabled	<ol style="list-style-type: none"> 1. Company 2. Country 3. CountryRegion 4. Languages
Commission	Enabled	<ol style="list-style-type: none"> 1. Bonus 2. CodedRank 3. CodingType 4. Commission 5. CommissionBinaryTree 6. CommissionRun 7. CommissionRunStatus 8. CommissionUniLevelTree 9. CustomerOverride 10. Override 11. Period 12. PeriodRankScores 13. PeriodType 14. PeriodVolume 15. Rank
Customer	Enabled	<ol style="list-style-type: none"> 1. Customer 2. CustomerAccount 3. CustomerAdjustment 4. CustomerContact 5. CustomerFieldNames 6. CustomerStatus 7. CustomerType 8. CustomerWall 9. TaxAddressType 10. TaxCodeType 11. TaxNameType
CustomersExtended	Disabled	<ol style="list-style-type: none"> 1. CustomerEvent 2. CustomerEventHistory 3. CustomerExtendedDetail 4. CustomerExtendedGroup 5. CustomerInquiry 6. CustomerInquiryCategory 7. CustomerInquiryType

		<ol style="list-style-type: none"> 8. CustomerLead 9. CustomerPointAccount 10. CustomerSocialNetwork 11. CustomerSubscription 12. CustomerTransactionType 13. Party 14. PartyStatusType 15. PartyType 16. PayableType 17. PointAccount 18. PointTransaction 19. PointTransactionType 20. Subscription 21. SubscriptionStatus 22. CustomerSite
Item	Enabled	<ol style="list-style-type: none"> 1. Item 2. ItemChangeLog 3. ItemCountryRegion 4. ItemDynamicKitCategory 5. ItemDynamicKitCategoryItemMember 6. ItemDynamicKitCategoryMember 7. ItemGroupMember 8. ItemLanguage 9. ItemPointAccount 10. ItemPrice 11. ItemStaticKitMember 12. ItemSubscription 13. ItemType 14. ItemWarehouse 15. WebCategory 16. PriceType 17. WebCategoryItem
Images	Disabled	<ol style="list-style-type: none"> 1. ItemImage 2. ImageFile
Log	Disabled	<ol style="list-style-type: none"> 1. AutoOrderChangeLog 2. AutoOrderStatusChangeLog 3. CustomerAccountChangeLog 4. CustomerChangeLog 5. CustomerRankChangeLog 6. CustomerStatusChangeLog 7. CustomerTypeChangeLog 8. EmailOutLog 9. MerchantDeclineLog 10. MerchchangeDeclineReason 11. OrderChangeLog

Messaging	Disabled	<ol style="list-style-type: none"> 1. Broadcast 2. BroadcastType 3. CompanyNews
		<ol style="list-style-type: none"> 4. CompanyNewsDepartments 5. SmsMessage 6. SmsStatus 7. SocialNetowrk
Order	Enabled	<ol style="list-style-type: none"> 1. CreditCardType 2. Currency 3. OrderBatch 4. OrderFieldNames 5. OrderReplacementCategories 6. OrderReturnCategories 7. Orders 8. OrderStatus 9. OrderStatusChangeLog 10. OrderType 11. Payments 12. PaymentCard 13. PaymentCardTypes 14. PaymentType 15. Payout 16. PayoutBill 17. PayoutTypes 18. ShipCarrier 19. ShipMethod 20. ShipRates 21. Warehouse 22. WarehouseCurrency
Payout	Disabled	<ol style="list-style-type: none"> 1. Bill 2. BillStatus 3. BillType 4. CustomerPayoutSettings
Tree	Enabled	<ol style="list-style-type: none"> 1. BinaryPlacementType 2. BinaryTree 3. EnrollerTree 4. UniLevelTree
User	Disabled	<ol style="list-style-type: none"> 1. Department 2. Users