

User Guide

Salesforce Backup & Recovery



SF UG WL-CE 23.4.1

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1 Preface

1.1 About This Guide

Thank you for selecting our backup service for Salesforce. Relax! All your Salesforce data is now securely protected with easy recovery from data loss. Our backup service comprehensively backs up your data on industry-leading AWS S3 storage. Our product's ethos is to provide feature-rich backup and recovery with security, ease of use, and flexibility woven in.

Our backup service is cloud-native, a full cloud-to-cloud solution. No installation is required, the setup is hassle-free, backup is easy, and there are flexible recovery and export options. Read on for instructions about how to activate and manage your backups, restore your data by keyword, from any point-in-time, and at any granular/hierarchical level, export your backups to your own storage, activate summary/exception reporting, and set up MFA and other helpful features.

1.2 Audience

This guide is intended for individuals who administer our backup service for Salesforce.

1.3 What's in This Guide

This guide is organized to help you find the information you need to manage our backup service for Salesforce. It is divided into functional parts intended to support you as you manage your environment:

- [Creating and Accessing Your Backup Account](#)
- [Backing Up Your Data](#)
- [Recovering Your Backed Up Data](#)
- [Comparing, Replicating, and Setting Smart Alerts](#)
- [Filtering and Viewing Drill-Down Details](#)
- [Managing Your Account](#)
- [Managing Subscriptions and Payments](#)

2

Creating and Accessing Your Backup Account

2.1

Prerequisites

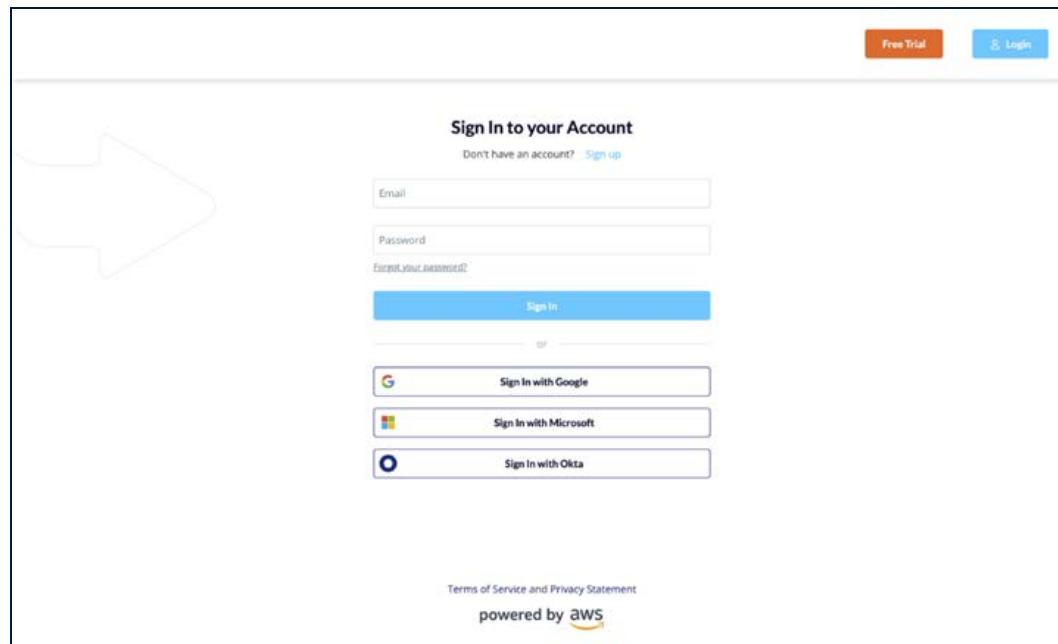
To administer backups for the Salesforce environment, the following is required:

- Salesforce Subscription. Not all editions of Salesforce support API access required for CloudAlly backup to operate. The following editions support the API access: Enterprise Edition, Unlimited Edition, Developer Edition, Performance Edition, and Salesforce Essentials Edition.
- Salesforce account with API access enabled in the profile.

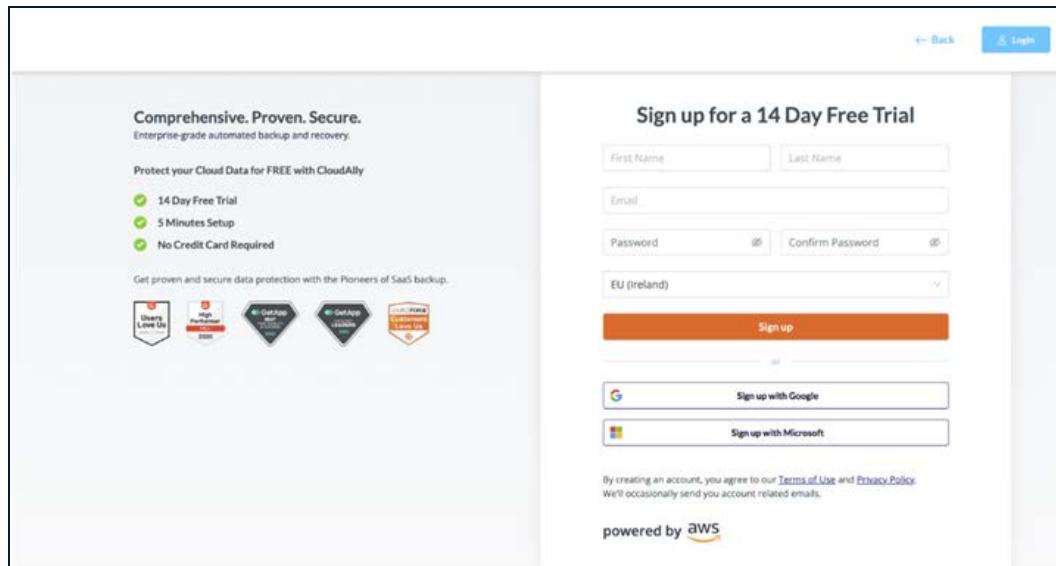
2.2

Sign Up/Sign In from Our Backup Service Home Page

1. In your Internet browser, open our backup service's website and click **Login**.
2. Click **Customers**. The *Sign In* page is displayed.



3. If you don't have an account yet, click **Free Trial**. The *Sign Up* page is displayed.



4. Complete the form, and then click **Sign up**.

Note: Our backup service gives you the choice of numerous AWS data centers available in the dropdown menu “Location.” These include locations in Australia, Canada, EU (France, Germany, and Ireland), US, UK, and Japan. The ability to choose from a wide range of data centers helps our customers comply with local data sovereignty laws that regulate the physical location and movement of data. In addition, we also offer a “Bring Your Own Storage” (BYOS) option on request. This allows you to backup sensitive data in your own AWS S3 buckets, S3 compatible storage service, Azure, or Google Cloud Platform. Please contact our backup service support for more information.

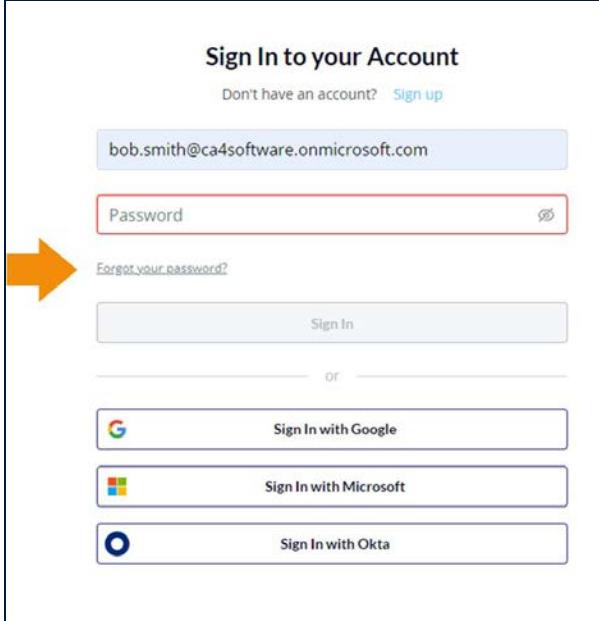
5. Your trial account is created, and an email containing your activation link is sent to your email address. Click on the activation link contained in the email you received to activate your account. If you sign up with Google, Azure, or Okta, the activation link will not be sent to you.
6. Once your account is activated, you are redirected to the backup service *login* page. Enter your email address/password and click **Sign In** to login and access your account.

You can also enable Two-Factor authentication to provide additional security. For more information, see [Managing Your Account](#).

2.3 Resetting Your Password

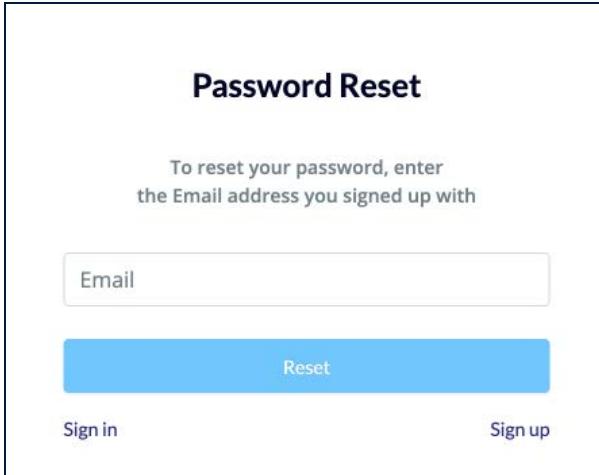
If you do not remember your password, you can easily reset it using the **Password Reset** function.

1. On the sign-in page, click **Forgot your password?** to start the process of resetting your password.



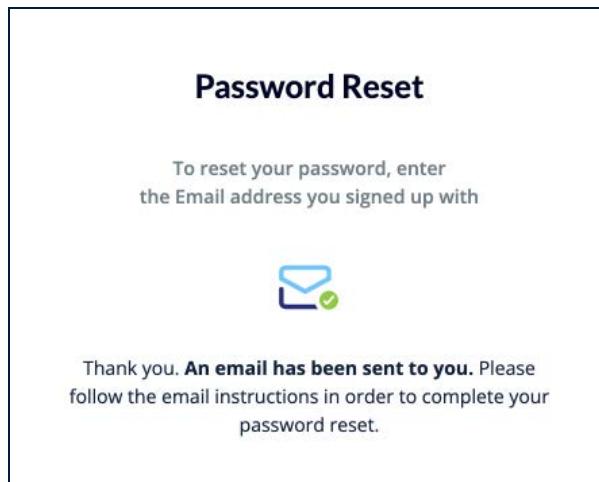
The image shows the 'Sign In to your Account' page. It features a text input field for the email address 'bob.smith@ca4software.onmicrosoft.com'. Below it is a password input field with a 'Forgot your password?' link underneath. A large orange arrow points to this link. To the right of the password field is a 'Sign in' button. Below these are three social sign-in options: 'Sign In with Google', 'Sign In with Microsoft', and 'Sign In with Okta'. At the top, there is a link 'Don't have an account? [Sign up](#)'.

2. The **Password Reset** page will appear.

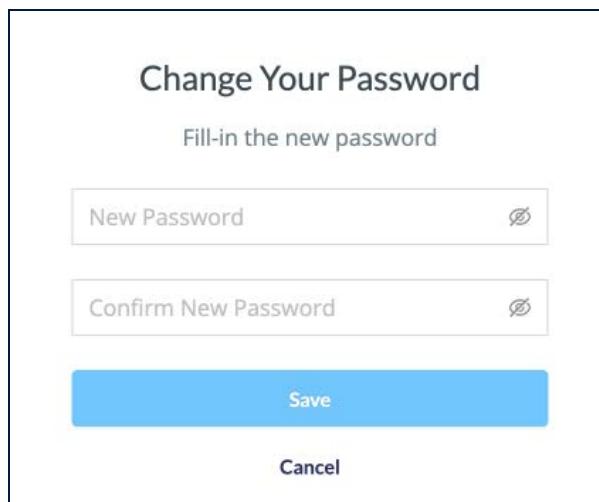


The image shows the 'Password Reset' page. It has a text input field labeled 'Email' and a blue 'Reset' button below it. At the bottom, there are links for 'Sign in' and 'Sign up'.

3. In the Email field, enter the email address that you used to sign up.
4. Click **Reset**, and the *Password Reset* window will appear.



5. In the email, click **Reset Backup Service Password** to confirm the password reset, and the *Change Your Password* window will appear.



6. Enter your new password in the **New Password** field and again in the **Confirm New Password** field, and click **Save**.

After resetting the password, you will be directed back to the *Sign In to your Account*.

3 Backing Up Your Salesforce Data

For many businesses, Salesforce data serves as the infrastructure for success. To protect your business' critical data, a system administrator must perform time-consuming, manual on-site backups that can only be completed once a week. Whether as a result of accidental or malicious data deletion or inadvertent processes that result in data corruption, your business' lack of daily Salesforce data backups represents a tremendous and unnecessary risk. Our backup service's automated daily Salesforce backup service eliminates this risk and ensures that your data is protected around the clock and is available for recovery whenever you need it.

Note: An Admin account is required to back up all Salesforce user accounts.

Our backup service backs up all Salesforce organizational data, including chatter feeds and metadata.

3.1 Creating a New Backup Task

Pre-requisite: Enabling API Access

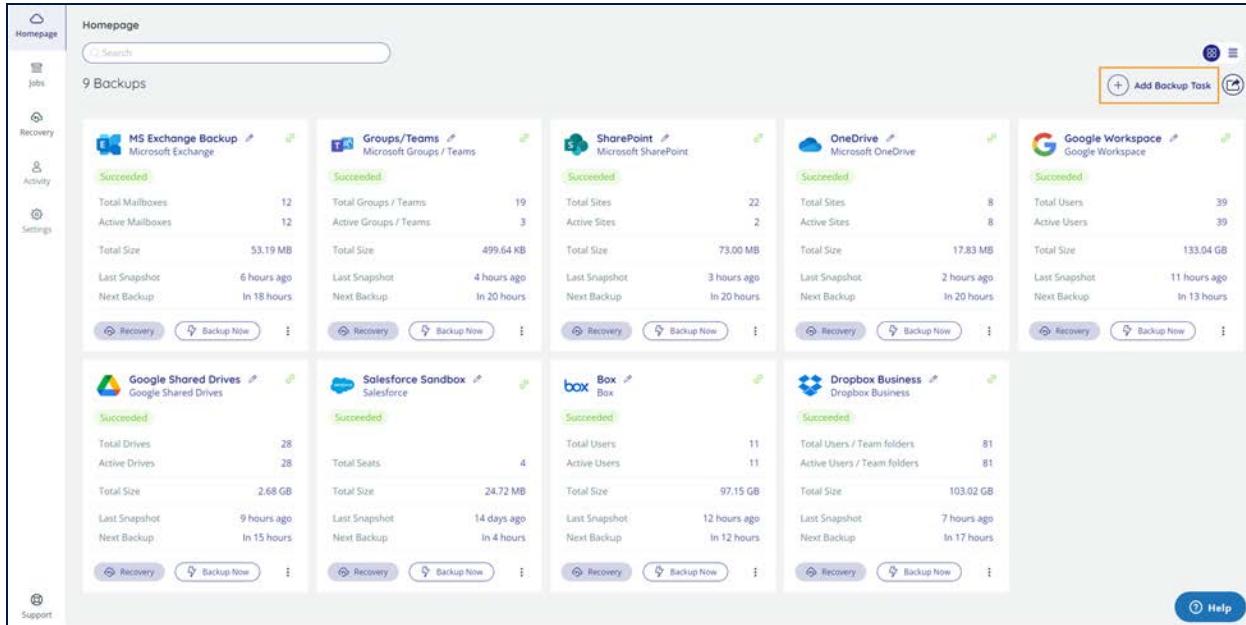
Before our backup service can access your Salesforce account, you need to enable API access in your Salesforce user profile:

1. Log in to your Salesforce account.
2. Click **Setup** at the top of the page.
3. Under **Administration Setup**, expand **Manage Users**, and then click **Profiles**.
4. Click **Edit** for the appropriate Profile.
5. Under **Administrative Permissions**, check API Enabled, View All Data, and Modify All Data.

To create a new backup task:

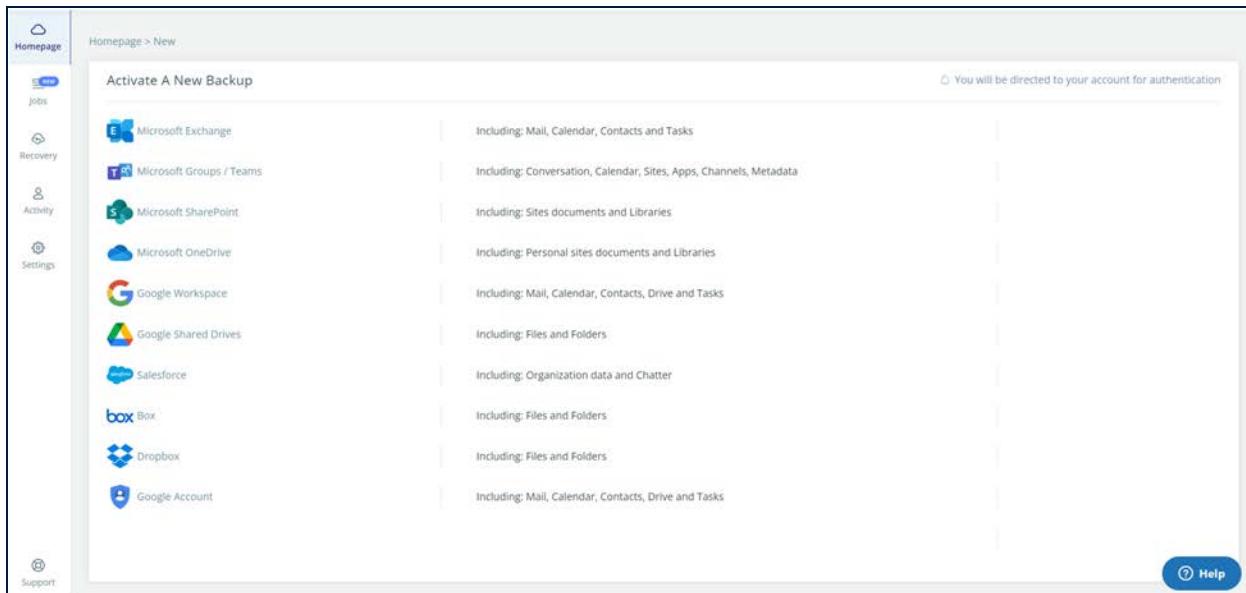
1. Sign in to your account, or if you are already signed in, click the **Homepage** option in the Navigation Panel.

2. On the Homepage, click + Add Backup Task.



The screenshot shows the Cloud-to-Cloud Backup Service homepage. On the left, a sidebar includes links for Homepage, Jobs, Recovery, Activity, Settings, and Support. The main area displays a grid of backup tasks for various services. Each task card includes a service icon, name, status (e.g., Succeeded), and detailed statistics. A prominent orange button in the top right corner is labeled '+ Add Backup Task'.

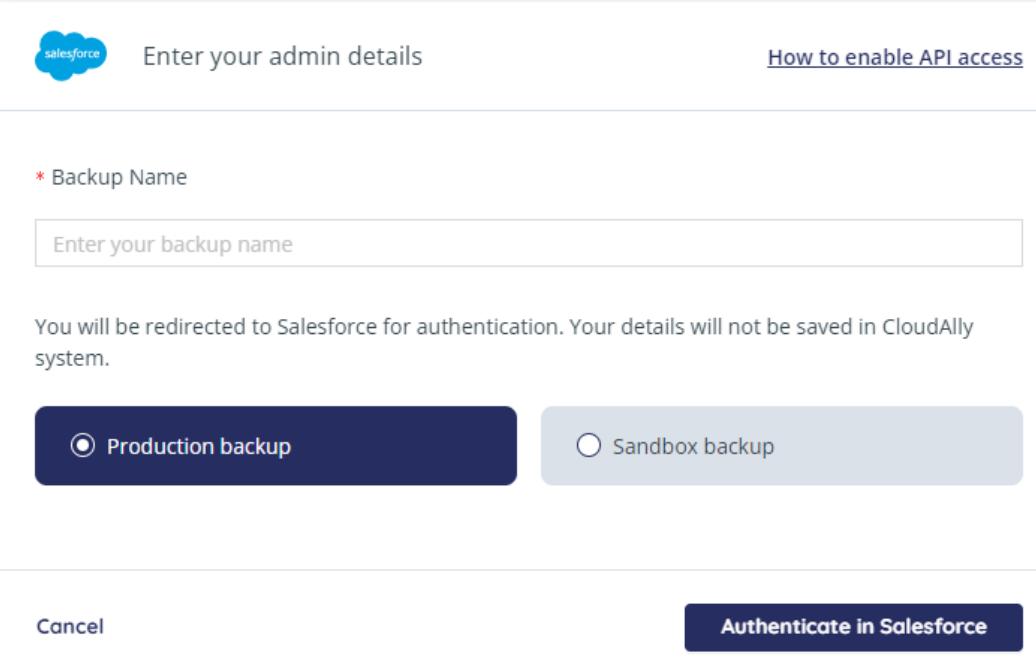
The Activate A New Backup page is displayed:



The screenshot shows the 'Activate A New Backup' page. The left sidebar is identical to the homepage. The main content area lists various cloud services with their backup inclusion details. A note at the top right states: 'You will be directed to your account for authentication'. A blue 'Help' button is located in the bottom right corner.

Service	Inclusion Details
Microsoft Exchange	Including: Mail, Calendar, Contacts and Tasks
Microsoft Groups / Teams	Including: Conversation, Calendar, Sites, Apps, Channels, Metadata
Microsoft SharePoint	Including: Sites documents and Libraries
Microsoft OneDrive	Including: Personal sites documents and Libraries
Google Workspace	Including: Mail, Calendar, Contacts, Drive and Tasks
Google Shared Drives	Including: Files and Folders
Salesforce	Including: Organization data and Chatter
box	Including: Files and Folders
Dropbox	Including: Files and Folders
Google Account	Including: Mail, Calendar, Contacts, Drive and Tasks

3. Click **Salesforce**. The following screen appears.



Enter your admin details [How to enable API access](#)

* Backup Name

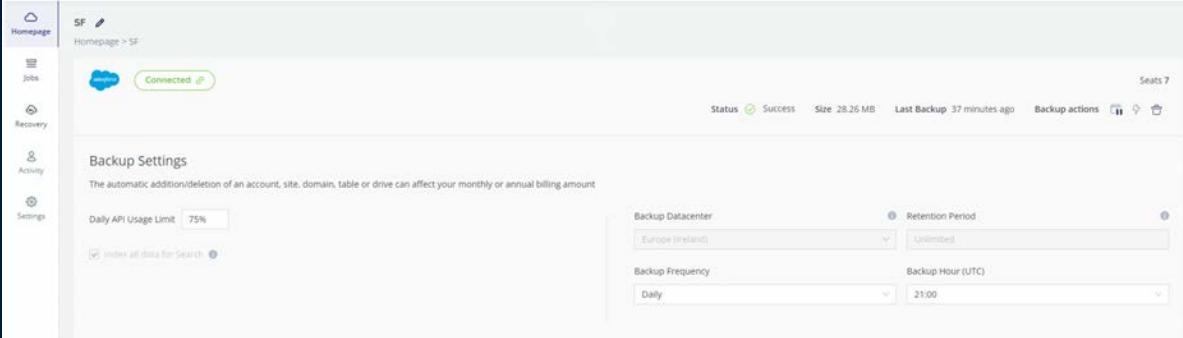
Enter your backup name

You will be redirected to Salesforce for authentication. Your details will not be saved in CloudAlly system.

Production backup Sandbox backup

[Cancel](#) [Authenticate in Salesforce](#)

4. Fill in the name of the backup task. This name is used in the notifications and reports, and it can be changed later.
5. Select whether you'd like to back up your **Production** or **Sandbox** account. This option cannot be changed later.
6. Click **Authenticate in Salesforce**. You will be redirected to the Salesforce authorization page. Click the **Allow** button from the *Allow Access* page.
7. When prompted, enter your Salesforce Admin credentials from the Salesforce login screen, and click **Authorize**. You may be prompted to enter a code that was sent to your mobile device.
8. You will be redirected to the *Backup Settings* page, where you can adjust the settings of the backup.



Homepage > SF

Connected

Backup Settings

The automatic addition/deletion of an account, site, domain, table or drive can affect your monthly or annual billing amount.

Daily API Usage Limit: 75%

index all data for Search

Backup Datacenter: Europe (Ireland)

Retention Period: Unlimited

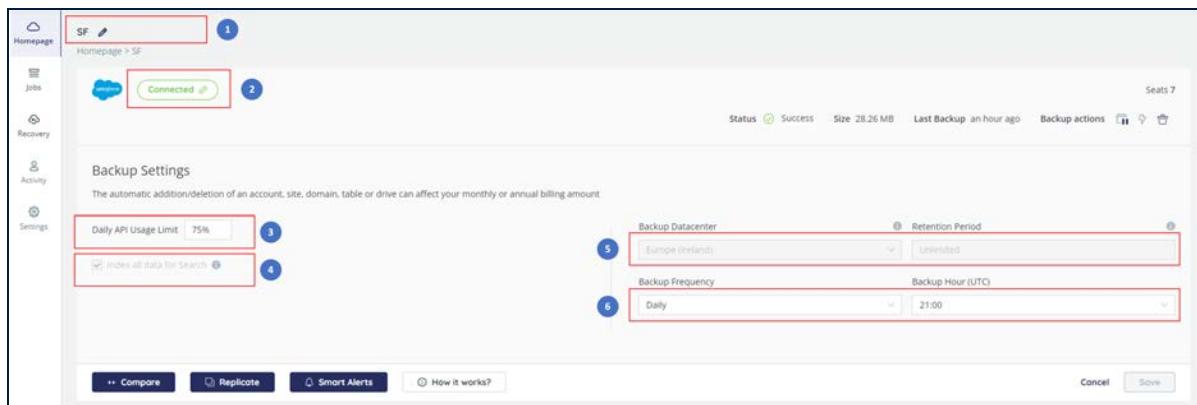
Backup Frequency: Daily

Backup Hour (UTC): 21:00

On this page, you can adjust the backup settings and activate backups for the Salesforce users. See the sections below for the detailed procedures.

3.2 Configuring Backup Settings

To access the configuration screen, click **Edit**.



1. You can change the name of the backup task by clicking the pencil icon.
2. The icon next to the Salesforce logo displays whether the application was able to connect to the specified Salesforce account. If the authentication token granted for the application becomes invalid (e.g., it expires due to inactivity because you put the backup task on pause for a long time), the Connected icon changes to Disconnected. To grant the application a new token, click on the icon to open the authentication dialog, and repeat the authentication process.
3. Enter the daily Salesforce API usage limit. The default value is 75% and the maximum value is 100%, which corresponds to the fraction of the total daily API limit.
4. By default, the “Index all data for Search” option is selected, which enables our backup service to provide you with its granular search and restore functionality. In the process, your data is temporarily decrypted for a brief period of time, and then re-encrypted once the index is built. If this goes against your company policy and you would like to disable automatic indexing, please contact our backup service support.

Note: The **Backup Data Center** and **Retention Period** fields are “display only,” and their values can’t be changed here.

5. The **Backup Data Center** field displays the Data Center location you selected when you signed up with your registration.

The **Retention Period** field displays whether a retention period has been set up. By default, we provide unlimited retention of your daily backups for as long as you maintain your account subscription. You can override this default and specify a retention period in days, months, or years by contacting support. Backups older than the retention period specified will be automatically deleted.

Note: Your backup storage location cannot be changed once it's been set during the account setup process. Contact support if you need to move backups to a different geographic region, or if you'd like more information on our "Bring Your Own Storage" (BYOS) option.

6. Backup Frequency and Backup Hour

- a. Click the drop-down list adjacent to the **Backup Frequency** field and select how often you would like the backups to occur. The available options include:
 - i. Daily
 - ii. Every 3 days
 - iii. Weekly
- b. Click the drop-down list adjacent to the **Backup Hour (UTC)** field and select the backup hour. Click **Save**.

Note: Adding more frequent backups is possible via a support request.

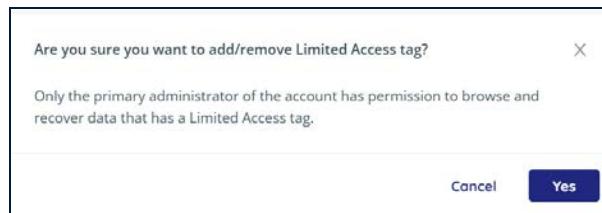
3.2.1 Compare, Replicate, and Smart Alert Buttons

- You can click **Compare** to initiate the data or metadata comparison process. This operation compares data or metadata between two backup snapshots or a backup snapshot and production database.
- You can click **Replicate** to start the data or metadata replication process. This process can help you copy the data or metadata of your organization to the

sandbox of your or any other organization. The tool is especially helpful for Seeding purposes.

- You can click **Smart Alert** to create an alert that compares changes between the previous and latest backups.

Detailed instructions about all three of these features are provided in ["Comparing, Replicating, and Setting Smart Alerts."](#)

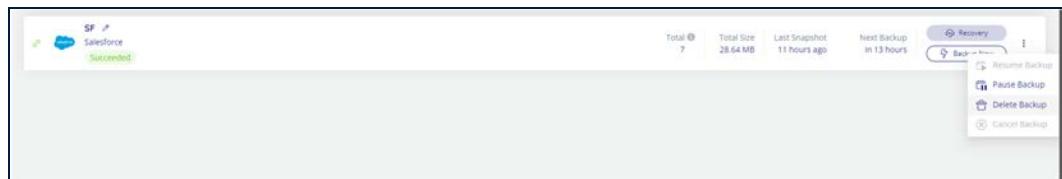


3.3 Removing a Backup

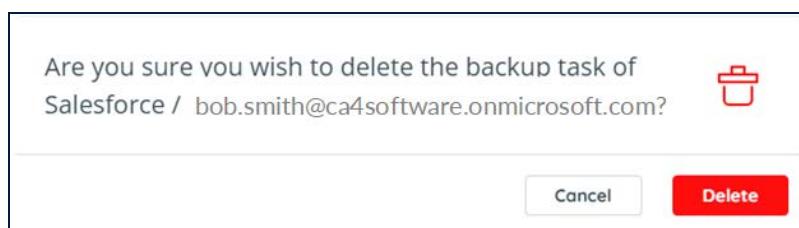
You can delete individual user backups or the entire backup service from your account if you do not want to use them further. The following sections guide you through the process of removing backup services and individual user backups.

3.3.1 Removing a Backup Task

To remove a backup task for a service, on the *Homepage*, click **Menu** > **Delete Backup** adjacent to the backup task you want to remove.



The **Confirm Delete** pop-up window is displayed with a warning message.



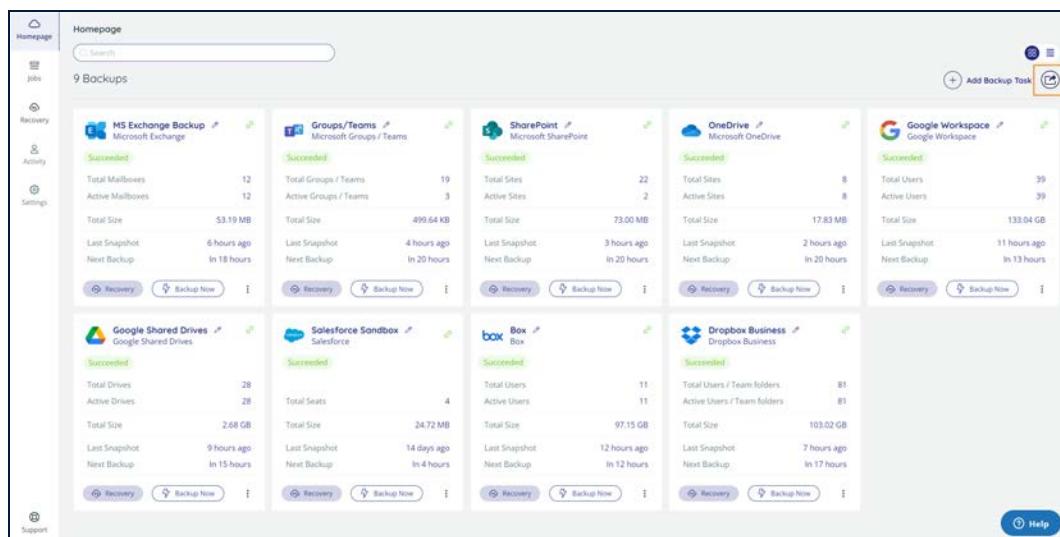
Click **Delete**. The selected backup service is removed from your account.

To prevent mistaken deletions, there is a grace period of 7 days after your backup is deleted.

3.4 Usage Reports

In order to provide greater clarity to you about which accounts our backup service is backing up, you can export a CSV file that lists all of the entities that were backed up, including the status of each entity (active, inactive, or archived).

To export a usage report, click the **Export** button, next to **Add Backup Task**. The report will be sent to you via email.

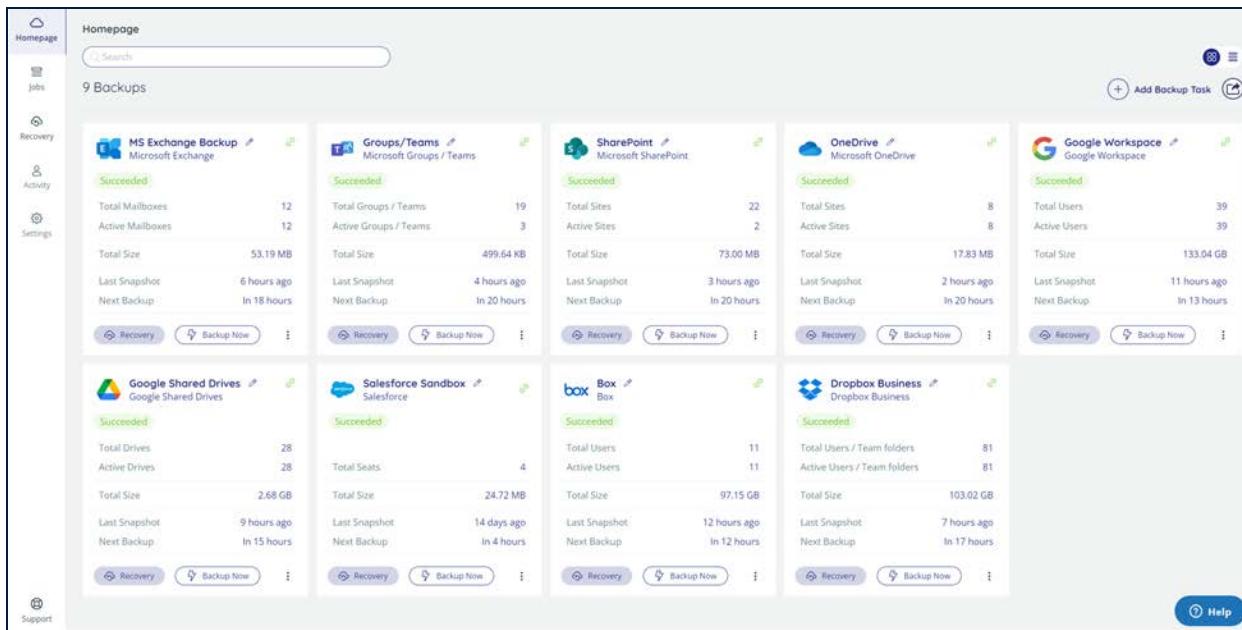


Service	Provider	Status	Total Mailboxes	Active Mailboxes	Total Size	Last Snapshot	Next Backup
MS Exchange Backup	Microsoft Exchange	Succeeded	12	12	53.19 MB	6 hours ago	In 18 hours
Groups/Teams	Microsoft Groups / Teams	Succeeded	19	3	499.64 KB	4 hours ago	In 20 hours
SharePoint	Microsoft SharePoint	Succeeded	22	2	73.00 MB	3 hours ago	In 20 hours
OneDrive	Microsoft OneDrive	Succeeded	8	8	17.83 MB	2 hours ago	In 20 hours
Google Workspace	Google Workspace	Succeeded	39	39	133.04 GB	11 hours ago	In 13 hours
Google Shared Drives	Google Shared Drives	Succeeded	28	28	2.68 GB	9 hours ago	In 15 hours
Salesforce Sandbox	Salesforce	Succeeded	4	4	24.72 MB	14 days ago	In 4 hours
Box	Box	Succeeded	11	11	97.15 GB	12 hours ago	In 12 hours
Dropbox Business	Dropbox Business	Succeeded	81	81	103.02 GB	7 hours ago	In 17 hours

3.5 Modifying the Settings of an Existing Backup

To modify an existing backup task:

1. Click the *Homepage* option from the Navigation Panel. The *Homepage* screen appears.



The screenshot shows the Cloud-to-Cloud Backup Service homepage with a sidebar on the left containing links for Homepage, Recovery, Activity, Settings, and Support. The main area displays 9 backups for the following services:

Service	Provider	Status	Total Mailboxes	Active Mailboxes	Total Size	Last Snapshot	Next Backup
MS Exchange Backup	Microsoft Exchange	Succeeded	12	12	53.19 MB	6 hours ago	In 18 hours
Groups/Teams	Microsoft Groups / Teams	Succeeded	19	3	499.64 KB	4 hours ago	In 20 hours
SharePoint	Microsoft SharePoint	Succeeded	22	2	73.00 MB	3 hours ago	In 20 hours
OneDrive	Microsoft OneDrive	Succeeded	8	8	17.83 MB	2 hours ago	In 20 hours
Google Workspace	Google Workspace	Succeeded	39	39	133.04 GB	11 hours ago	In 13 hours
Google Shared Drives	Google Shared Drives	Succeeded	28	28	2.68 GB	9 hours ago	In 15 hours
Salesforce Sandbox	Salesforce	Succeeded	4		24.72 MB	14 days ago	In 4 hours
Box	Box	Succeeded	11	11	97.15 GB	12 hours ago	In 12 hours
Dropbox Business	Dropbox Business	Succeeded	81	81	103.02 GB	7 hours ago	In 17 hours

Each service entry includes a 'Recovery' and 'Backup Now' button. A 'Help' button is located in the bottom right corner.

2. Click the Salesforce icon from the list or enter a keyword in the Search field to find a specific task. The *Salesforce Backup* page is displayed.
3. Click **Settings Edit** on the top-right section of the screen to see the backup settings.

From here, it is possible to modify the fields described in [Configuring Backup Settings](#).

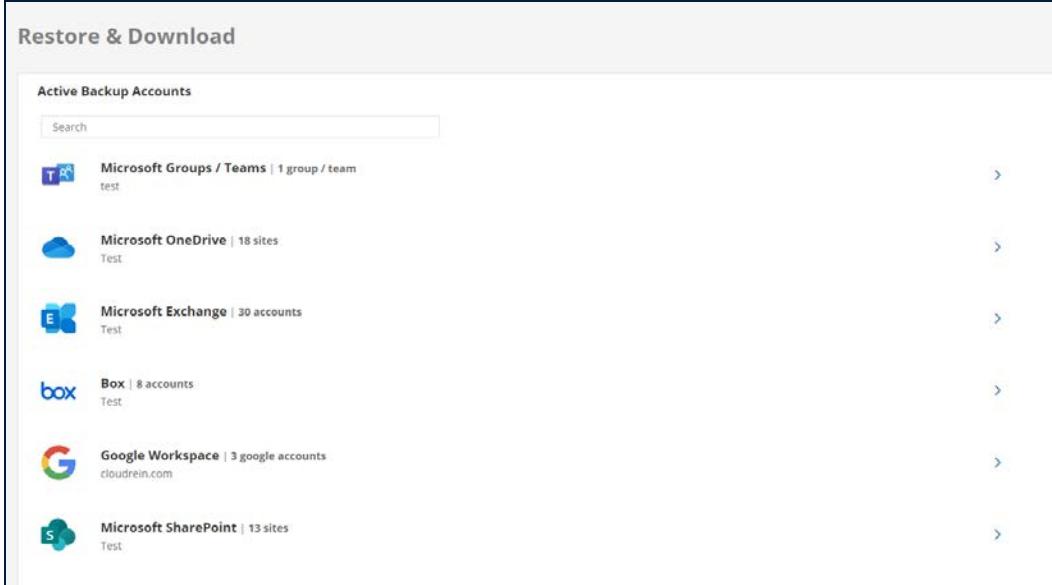
4 Recovering Your Backed Up Data

4.1 Using the Recovery Menu

The Recovery Menu provides you with options at a fine granularity for selecting which account to restore or export.

To recover your backed up data:

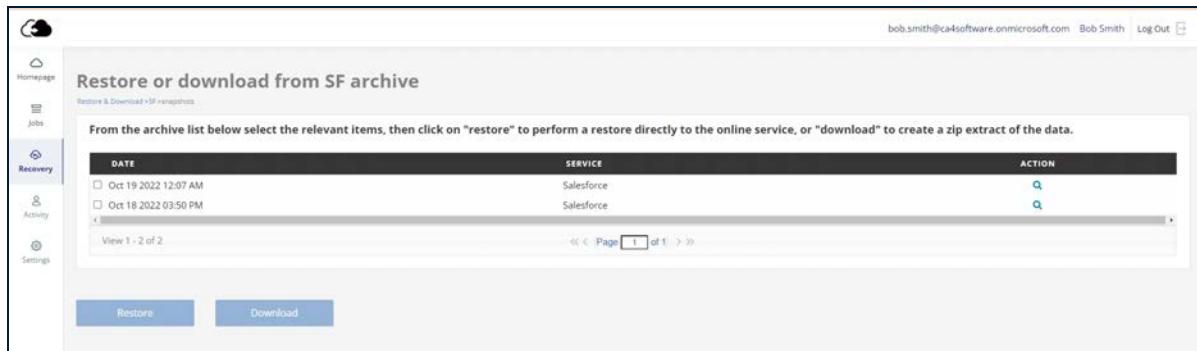
1. Click Recovery from the Navigation Panel. The *Restore & Download* page is displayed with all your active-backup account details.



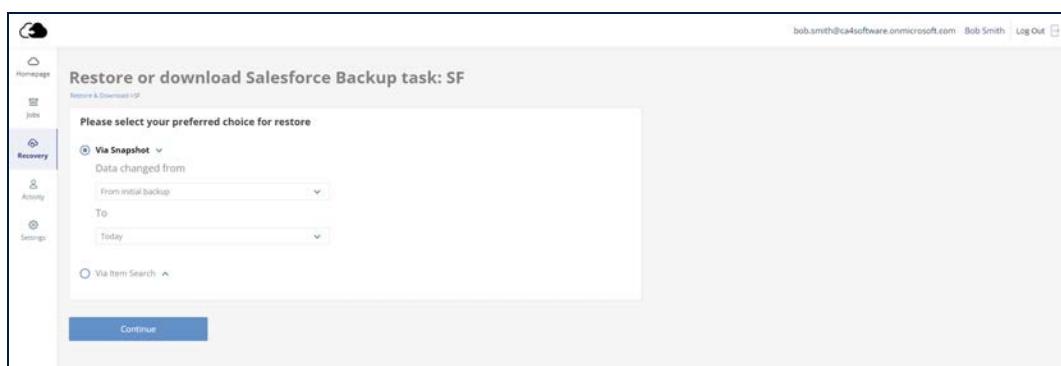
The screenshot shows the 'Restore & Download' page with the following interface:

- Section Header:** 'Restore & Download'
- Section:** 'Active Backup Accounts'
- Search Bar:** 'Search' (empty)
- List of Accounts:**
 - Microsoft Groups / Teams** | 1 group / team
test
 - Microsoft OneDrive** | 18 sites
Test
 - Microsoft Exchange** | 30 accounts
Test
 - Box** | 8 accounts
Test
 - Google Workspace** | 3 google accounts
cloudrein.com
 - Microsoft SharePoint** | 13 sites
Test

2. Click the Salesforce backup task from which you wish to recover the data.



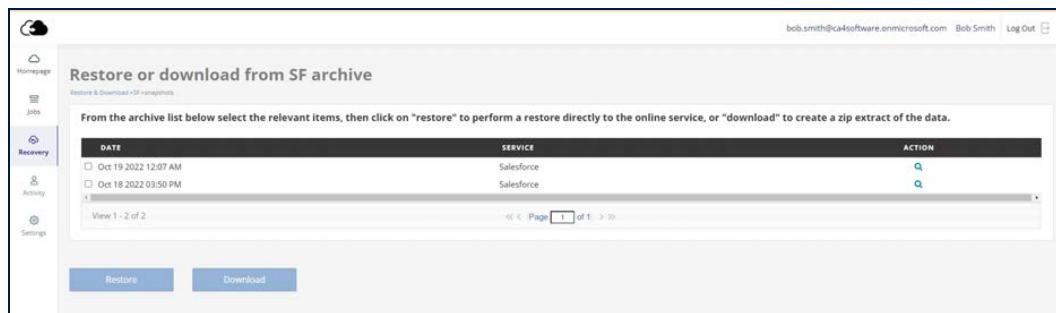
The *Restore or download Salesforce* page is displayed.



- Select the radio button for your preferred restore method:
 - [Via Snapshot \(see Via Snapshot\)](#)
 - [Via Item Search \(see Via Item Search\)](#)

4.1.1 Restore or Download Via Snapshot

1. Enter the date range that you would like to restore using the *Data changed from* and *To* fields, and press **Continue**.
2. The list of backup snapshots within that date range is displayed. Select the snapshot you want to recover.



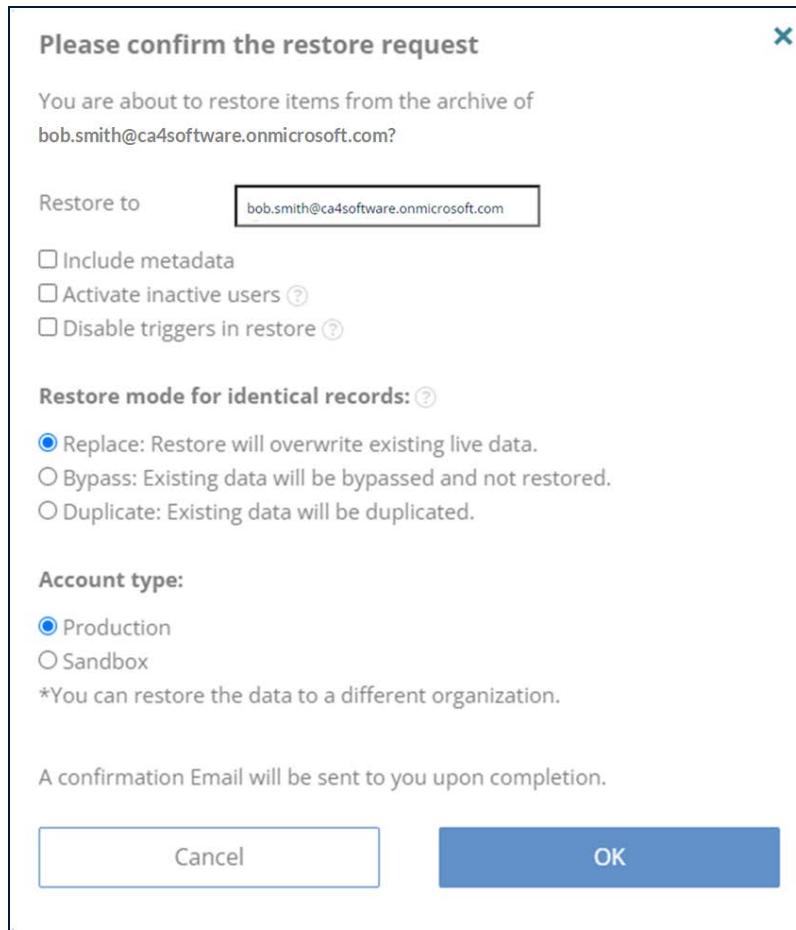
3. Alternatively, you can click the magnifying glass in the Action column to drill down into the snapshot and view the structure of the backed up data. There you can select one or more items for recovery.
4. Once you select a snapshot (if you wish to recover all the data in the backup), or one or more items (if you wish to recover only selected items), the **Restore** and **Download** buttons become available.

4.1.1.1 Restore

If you click **Restore**, the restore confirmation window appears, asking you about the following:

- Which account would you like to restore the data to? You can restore the data to a different Salesforce instance.
- Do you want to:
 - **Include metadata:** If you want to include information about the fields, configurations, code, logic, and page, etc.
 - **Activate inactive users:** If you would like the restore process to automatically attempt to activate inactive users to restore the associated data using their accounts. The users will be deactivated after the restore process. If the checkbox is left unmarked, the restore will attempt to insert the data as the current user.
 - **Disable triggers in restore:** Data affected by restore can activate triggers. Mark this checkbox if you would like the restore process to automatically disable all Validation Rules, Workflows, Triggers, and Processes in the restored data. This doesn't affect the triggers in the existing data at the destination organization. After the restoration process concludes, all Validation Rules, Workflows, Triggers, and Processes are automatically reactivated.

- Choose one of the three available restore modes:
 - **Replace:** The restored content will be merged with existing data. Deleted items and folders will be restored from the snapshot. Existing items will be overwritten with the snapshot version.
Use this option: to restore or repair deleted / modified items
 - **Bypass:** The restored content will be merged with existing data. Deleted items and folders will be restored from the snapshot. Existing items will be skipped.
Use this option: to restore deleted data.
 - **Duplicate:** The restored data will be duplicated in the same location as the existing data, with a suffix that indicates that it is a copy. (The suffix contains the year, month, day, hour, minutes, and seconds, e.g., 20230401000525.) Deleted items and folders will be restored from the snapshot.
Use this option: to compare both versions of each file, to ensure the correct version is preserved
- Choose available account types:
 - Production
 - Sandbox

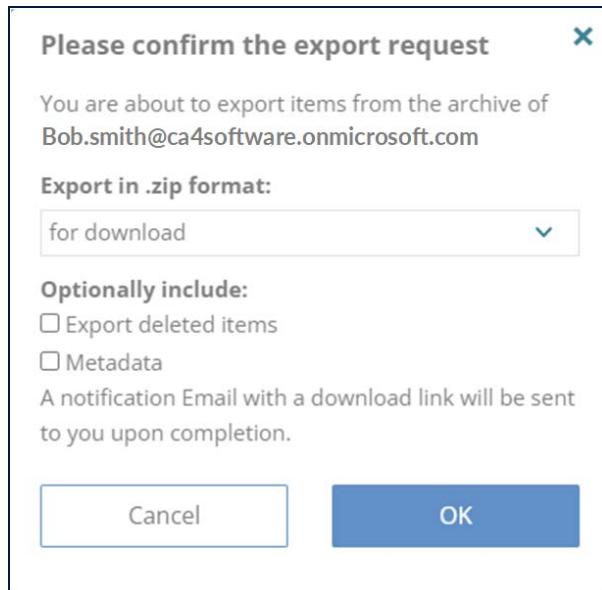


The backup data that you selected will be restored to the location that you specified. When the recovery process is complete, a summary will be sent to your email.

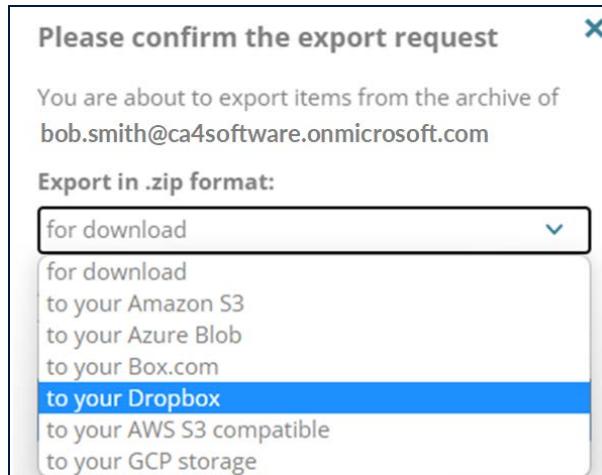
You can also check the Jobs page to see the progress of your task. See ["Tracking Recovery Tasks on the Jobs Page."](#)

4.1.1.2 Export/Download

1. If you click **Download**, the following confirmation window appears.



2. Click the drop-down list and select one of the following storage locations:



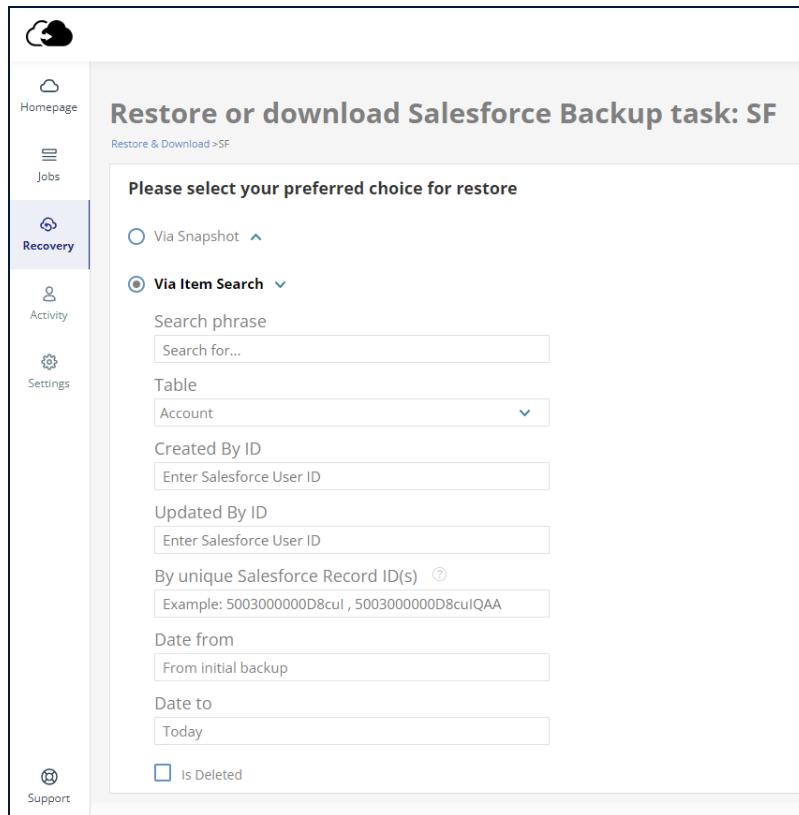
3. If you select options other than "for download," you may be asked for additional credentials and/or access tokens for the selected storage locations.
4. You may optionally include:
 - a. Deleted items
 - b. Metadata: If you want your to include information about the fields, configurations, code, logic, and page, etc.

5. Click **OK**. The download instructions are sent to your registered email address. The download link is only valid for 72 hours.
6. Or, you can check the *Jobs* page. (See "[Tracking Recovery Tasks on the Jobs Page.](#)") When the task is completed, the **Download Results** button will be active.



4.1.2 Restore or Download Via Item Search

1. Select **Via Item Search**, and enter a word or phrase to search on.
2. Or search using any of the following fields:
 - a. **Table**: Enter the name of the table from which the data has to be retrieved.
 - b. **Created by ID**: Enter a term that matches part of the user's ID
 - c. **Updated by ID**: Enter a term that matches part of the user's ID
 - d. **By unique Salesforce Record ID(s)**
 - e. **Date from / Data to**: Enter the date range that you would like to restore.
3. **Is Deleted**: Select the check box adjacent to this field if you want to include deleted items in your search.



4. Click **Continue**. The *Restore or download* page is displayed, showing the search results with details such as Type, Name and Date. The details columns are different for different types of restored items.
5. Select items you would like to restore or download. When at least one item is selected, **Restore** and **Download** become available.
6. Follow the instructions in the [Restore](#) or [Export/Download](#) sections to complete the recovery process.

4.2 Tracking Recovery Tasks on the Jobs Page

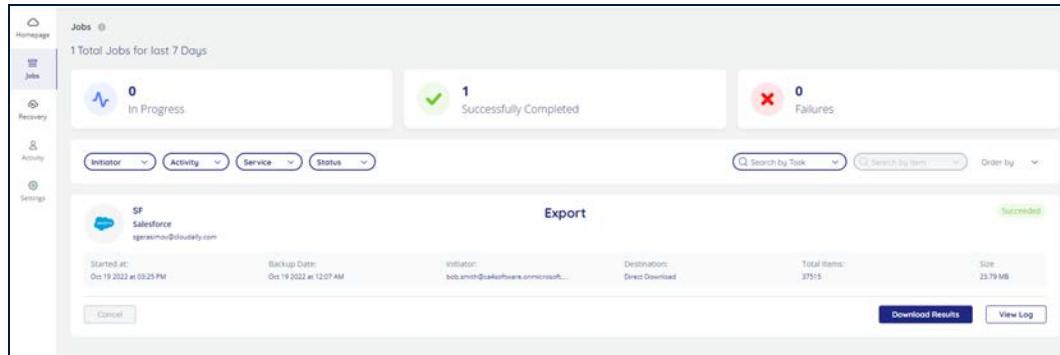
The Jobs page provides you with both high-level and drill-down views of your restore and export jobs over the last seven days.

Note: To see the status of your Backups, click the name of the backup from the *Homepage*.

From the Navigation pane, click **Jobs**.

4.2.1 High-Level Summary

- The top portion of the Jobs dashboard summarizes how many of your jobs are in progress, how many have successfully completed, and how many have partially succeeded or failed over the past 7 days.



To see a list of jobs that have any of these 3 statuses, click on the status, and your results will be filtered accordingly

4.2.2 Filtering

The next section allows you to filter by numerous criteria:

- **Initiator:** Who initiated the backup / restore?
- **Activity:** Filter by restores or exports.
- **Service:** Filter by one of the following services, such as:
 - Google Workspace
 - Google Shared Drives
 - Salesforce
 - Box
 - Dropbox
 - Google Account

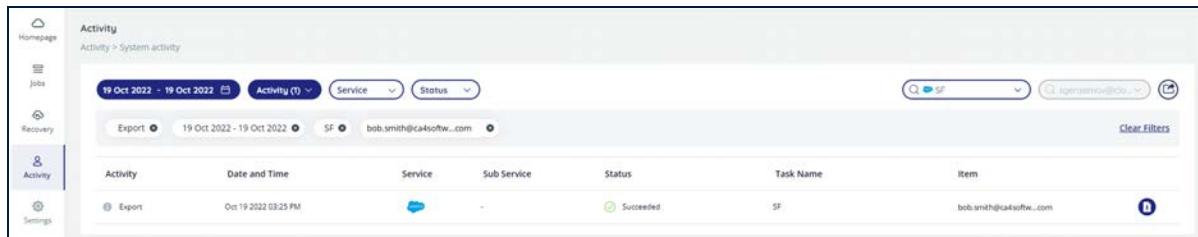
- **Status:** Filter by one of the following:
 - In progress
 - Succeeded
 - Partially succeeded
 - Failed
 - Pending
 - Canceled
- **Search by Task:** Filter by a task, such as:
 - Box
 - Dropbox
 - Google Workspace
 - Salesforce

If you choose to filter using a particular service, then you can focus on a specific item in the search bar. You can also order by:

- Latest First
- Oldest First

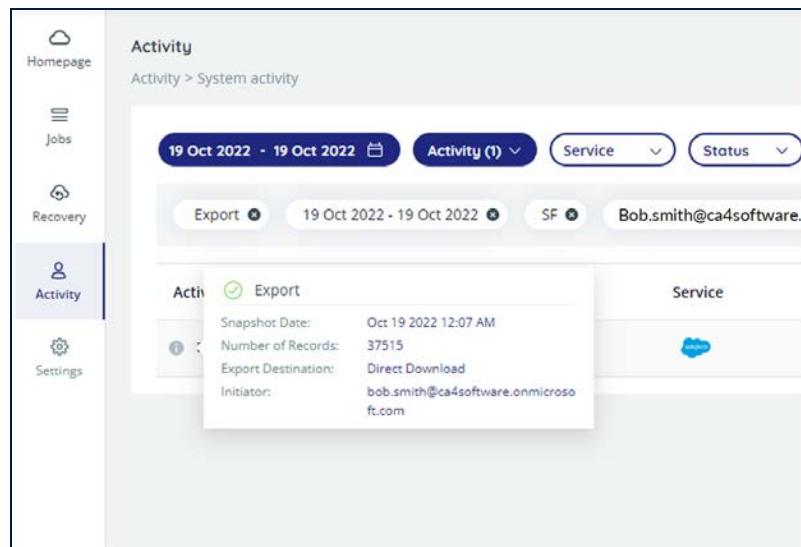
4.2.3 Description of Each Job

- The rest of the screen provides a detailed description of each individual job that you ran.
 - **Type of Job:** Export, or Restore – this appears as a large title within each job description.
 - **Name, Service, and Account** of the job.
 - Start date, backup date, initiator, destination, total items backed up or restored, and the size of the file(s).
- **Cancel** enables you to stop a job that is in progress.
- **Download Results** enables you to download a zip file with your recovery data.
- **View Log** redirects you to the System Activity page, which displays your account activity with details such as Activity, Date and Time, Service, Sub-Service, Status, Task Name, and Item.



This page enables you to filter and search the list of backup tasks, export the list as a CSV file, and view more details on any backup task.

The latter can be achieved by clicking the information icon in the Activity column. The Info pop-up displays the backup execution time, the size of the stored data, and the number of entities, and the summary of the backup execution.

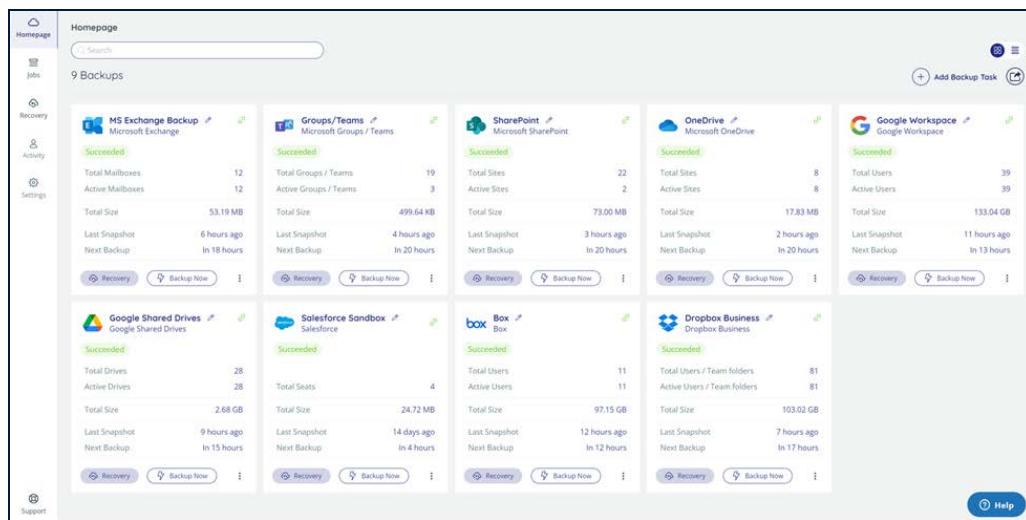


5 Filtering and Viewing Drill-Down Details

This section explains the process of finding the exact backup data you are looking for using filtering.

5.1 Filtering by account

1. Click the *Homepage* option from the Navigation Panel. The *Homepage* screen appears.



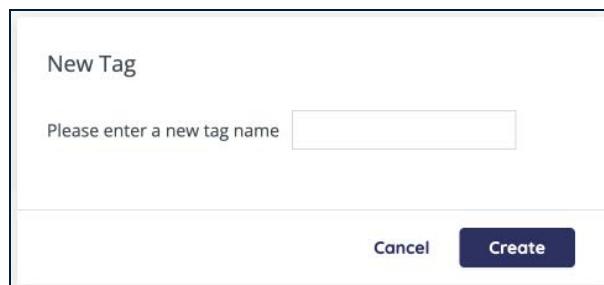
The screenshot shows the Backup Service Homepage. On the left, there are navigation links for 'Homepage', 'Jobs', 'Recovery', 'Activity', 'Settings', and 'Support'. The main area displays a grid of backup tasks for different cloud services. Each task card includes the service name, provider, status (e.g., 'Succeeded'), and various metrics like Total Mailboxes, Active Mailboxes, Total Size, Last Snapshot, and Next Backup. Buttons for 'Recovery' and 'Backup Now' are also present. The services listed are MS Exchange Backup (Microsoft Exchange), Groups/Teams (Microsoft Groups / Teams), SharePoint (Microsoft SharePoint), OneDrive (Microsoft OneDrive), Google Workspace (Google Workspace), Google Shared Drives (Google Shared Drives), Salesforce Sandbox (Salesforce), Box (Box), and Dropbox Business (Dropbox Business).

2. Click the Salesforce icon from the list or enter a keyword in the Search field to find a specific task. The *Salesforce Backup* page is displayed.
3. The *Salesforce Backup* page displays all the Salesforce accounts available for the administrator account you are using. The page displays the details such as Object Type, Object Name, Record Count, Status, Last Snapshot, and how many records were added, updated or deleted. It also provides the means to filter by Object Type or Status.

5.1.1 Filtering Using Names or Statuses

You can filter accounts using the following options:

- Enter a search phrase in the *Search by* field to view all the accounts with the entered keyword.
- Filter by Object Type: Data or Metadata.
- Filter by statuses such as Not Active, Scheduled, Success, In Process, Failed, Paused, Archived, or Partial.



5.2 Viewing Backup Statistics with the Drill-down Feature

Select the desired account, and click the downward-facing arrow at the end of the row. This option enables you to drill down to the backup history dashboard.

When you drill down, you can find a diagram describing past backups, and a brief summary of the backup outcomes.



The diagram depicts the number of items backed up each day. By hovering your mouse over a column in the diagram, you can see the number of items backed up in each service. This number includes all new and changed items, so it may be greater than the total number of items in the backup. You can select the date range of the chart with the sliders underneath it. The maximum range displayed is 30 days.

The summary tiles below the chart provide at-a-glance information about the backup: for each sub-service, they display the total number of items in the backup, the date of the last backup, and the outcome.

6 Comparing, Replicating, and Setting Smart Alerts

The Our backup service Compare, Replicate and Smart Alert tools allow you to compare your data or metadata across backups or your production Salesforce database, and to alert you when something significant has changed. You can compare any backup snapshot or Salesforce Production/Sandbox and, in the case of metadata, even to other organizations.

6.1 Compare

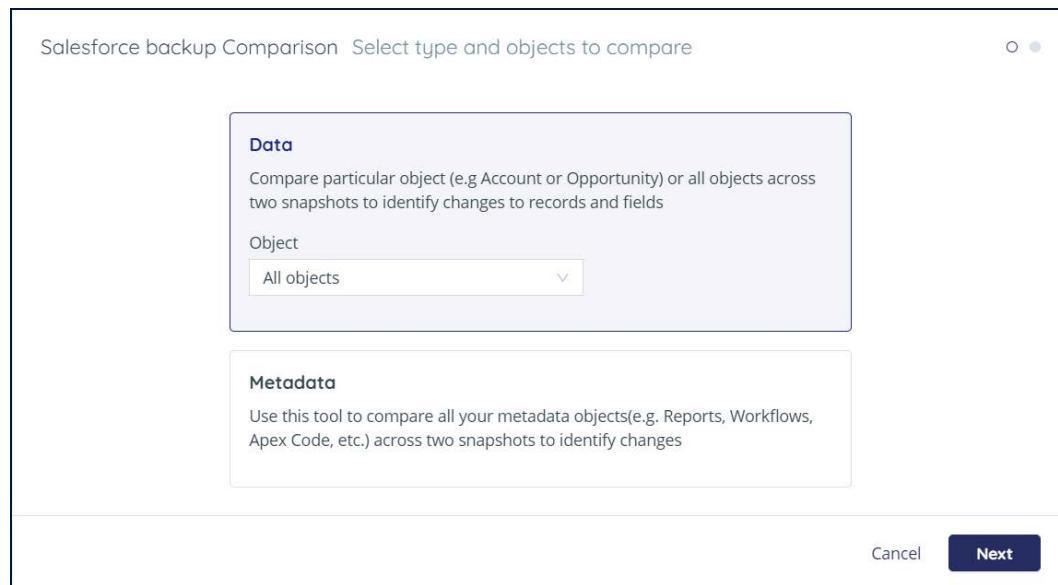
You can access the Compare tool by clicking the Salesforce backup task from the *Homepage*.



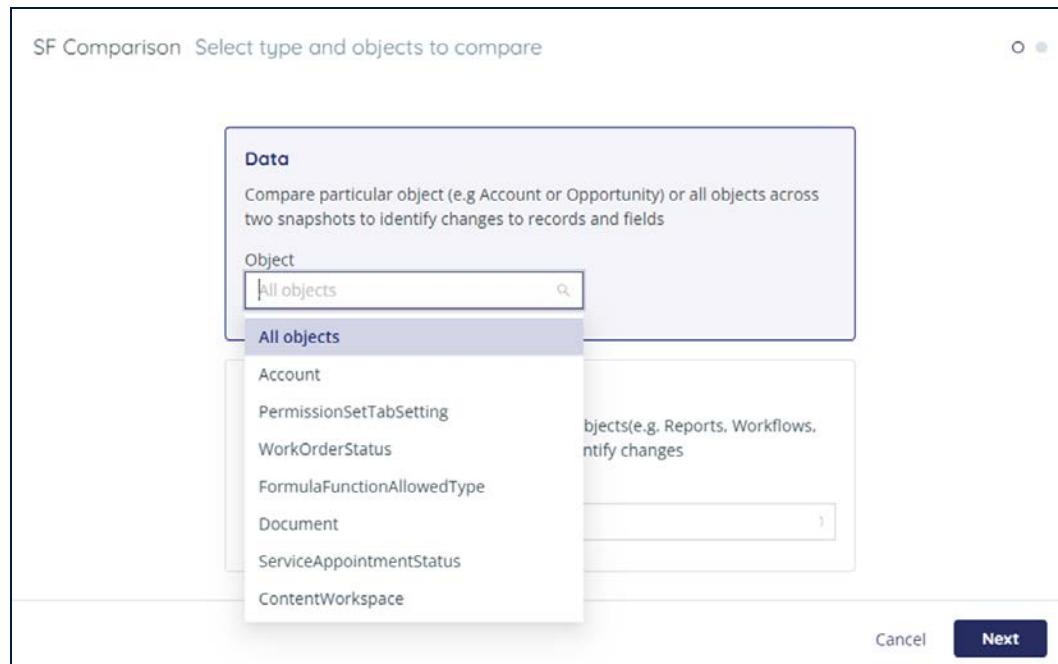
6.1.1 Initializing the Data Comparison

To initiate the comparison procedure, follow these steps:

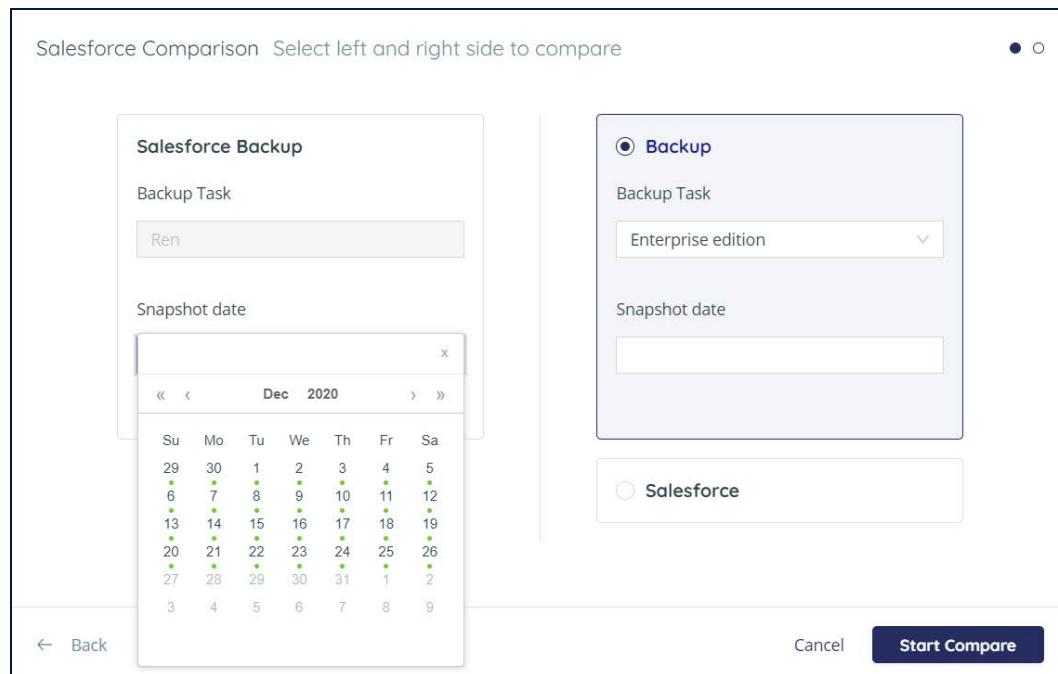
1. Click **Compare**.
2. The *Comparison* screen is displayed. The Data comparison option is selected by default:



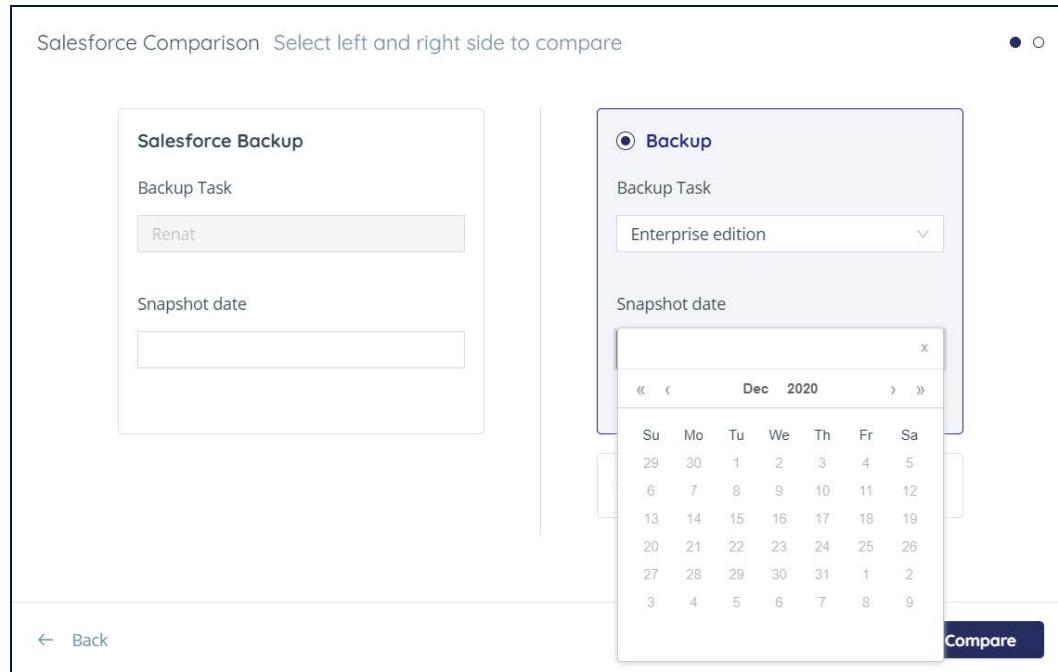
3. You can select which objects you want to compare. By default, all objects are compared during the operation. You can select an object from the drop-down menu:



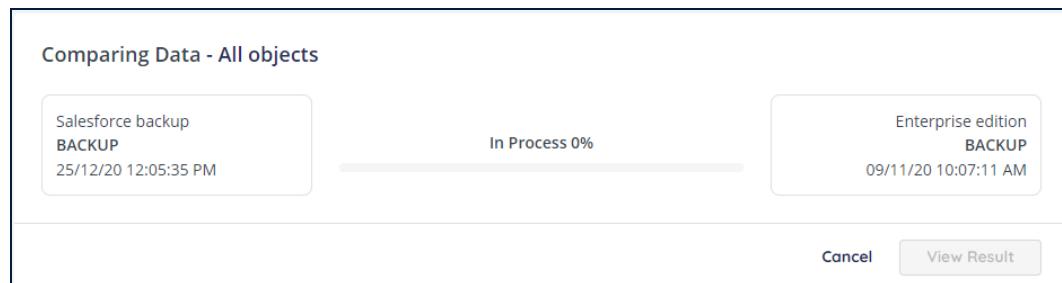
4. In the next step you are prompted to select the date of the sources of the data for the comparison:



5. Select the date of the backup task for which you initiated the comparison. If more than one backup was performed on the selected date, choose the time of the backup.



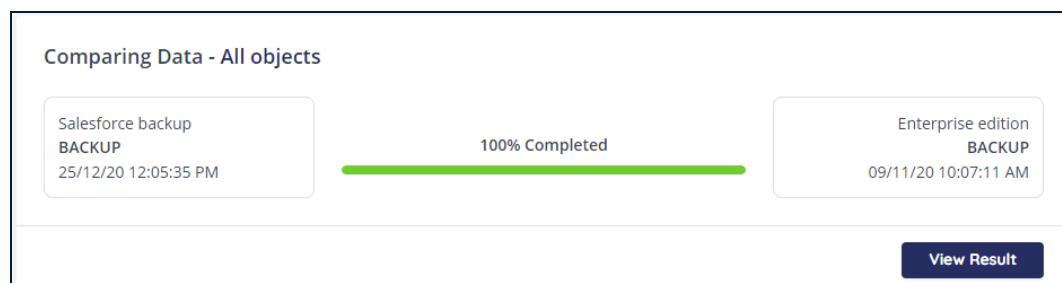
6. In the right panel, you can either select the backup task that will be used for comparison, or the Salesforce production database.
7. Once you have set the data sources, click **Start Compare**. The comparison task is started in the background, and the results will be available as soon as it is finished.



8. You can cancel the task with the **Cancel** button before it is finished.

6.1.2 Viewing the Data Comparison Results

Once the comparison task is finished, the **View Result** button becomes available.



Clicking on the **View Result** button takes you to the *Compare* page:

Backups					
Backups >> Salesforce backup >> Compare					
Backup task Salesforce backup		Search Object		Backup task Enterprise edition	
Total Records	Unique Records	Changed Records	Unique Records	Total Records	
3	3	0	1	1	Task
27	27	0	214	214	LightningUsageByAppTypeMetrics
3	3	0	3	3	TaskPriority
920	920	0	3526	3526	SetupEntityAccess
3742	3742	0	1080	1080	PermissionSetTabSetting

27	27	0	34	34	LightningToggleMetrics
58	58	0	870	870	LightningUsageByPageMetrics
1	0	1	0	1	ApexPageInfo
3	3	0	4	4	MatchingRule
3	3	0	20	20	ApexComponent
2	2	0	1	1	Test__c
1	1	0	1	1	Community
1	1	0	5	5	BusinessProcess
The following 3 data object(s) had no changes					
The following 40 data object(s) exist only in Backup task Renat - 25/12/20 12:05:35 PM					
The following 49 data object(s) exist only in Backup task Enterprise edition - 09/11/20 10:07:11 AM					

The results in this page are organized in a table displaying the Total number of records, the number of Unique records in each of the data sources, and the number

of changed records in each of the objects found in the Salesforce database at the point of backups (or in the production database respectively).

To find more details on the Unique or Changed elements, click the corresponding numbers in the table – they contain links to the “comma-separated values” (.csv) files containing detailed information on the unique or changed items in the corresponding object.

The CSV files created for the Unique and the Changed records are essentially different and describe different aspects of the records. Below is an example of a CSV file created for Unique records in an item:

	A	B	C	D	E	F	G	H	I	J	K
1	Id	Durability	Label	MasterLabel	NamespacePref	DeveloperName	LogoUrl	Description	UiType	NavType	UtilityBar
2	0000000000000000 06m5J00000n7 Sales	standard	salesforce	standard	Sales	/img/salesforce-i	The world's most popular sales	Aloha	Standard	Standard	
3	0000000000000000 06m2X000001D Sales	salesforce.com	standard	Sales	/img/salesforce-i	The world's most popular sales	Aloha	Standard	Standard		

The results page can be filtered via the Search bar at the top of the page. The search is case insensitive and requires just a partial match of the name of the objects.

Backups					
Backup task Salesforce backup			Backup task Enterprise edition		
25/12/20 12:05:35 PM	09/11/20 10:07:11 AM	log	0	16	16
Total Records	Unique Records	Changed Records	Unique Records	Total Records	
4	4	0	16	16	
6	6	0	3	3	
67	67	0	14	14	
662	662	0	55	55	
6921	6921	0	1107	1107	
The following 3 data object(s) had no changes					
The following 40 data object(s) exist only in Backup task Renat - 25/12/20 12:05:35 PM					
The following 49 data object(s) exist only in Backup task Enterprise edition - 09/11/20 10:07:11 AM					

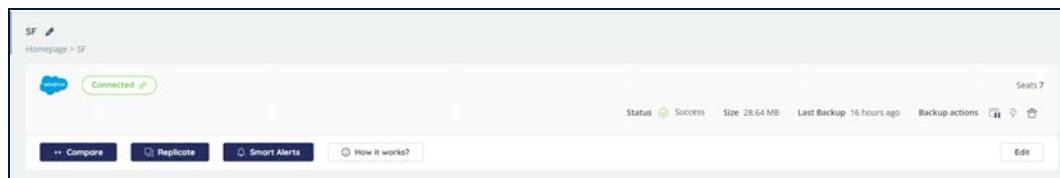
At the bottom of the page, you can find the summary of the objects that had no changes and the objects that only exist in either of the data sources. These numbers can also be clicked, displaying the detailed lists of respective objects:



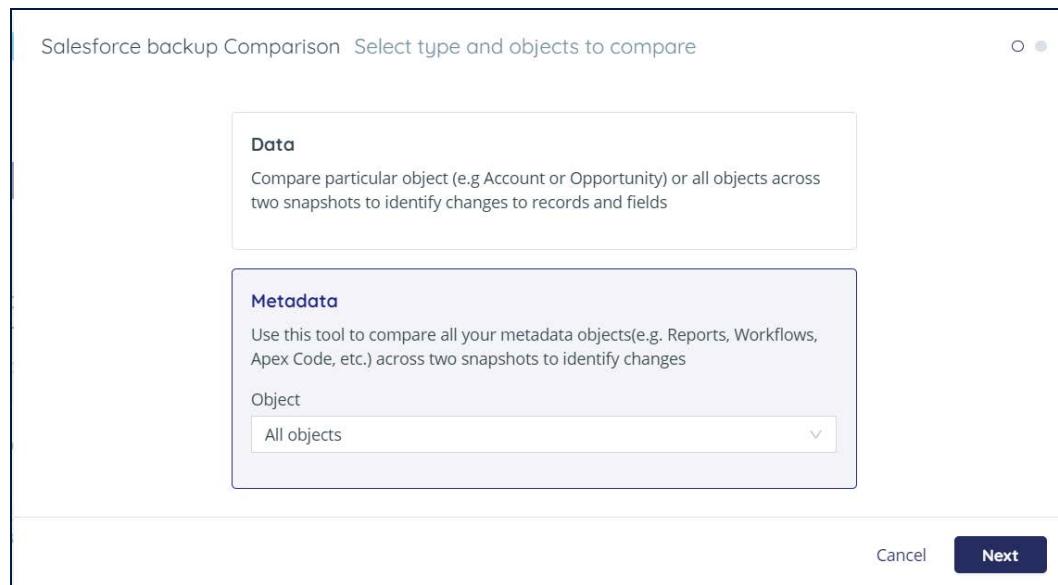
6.2 Comparing Metadata

6.2.1 Initializing the Metadata Comparison

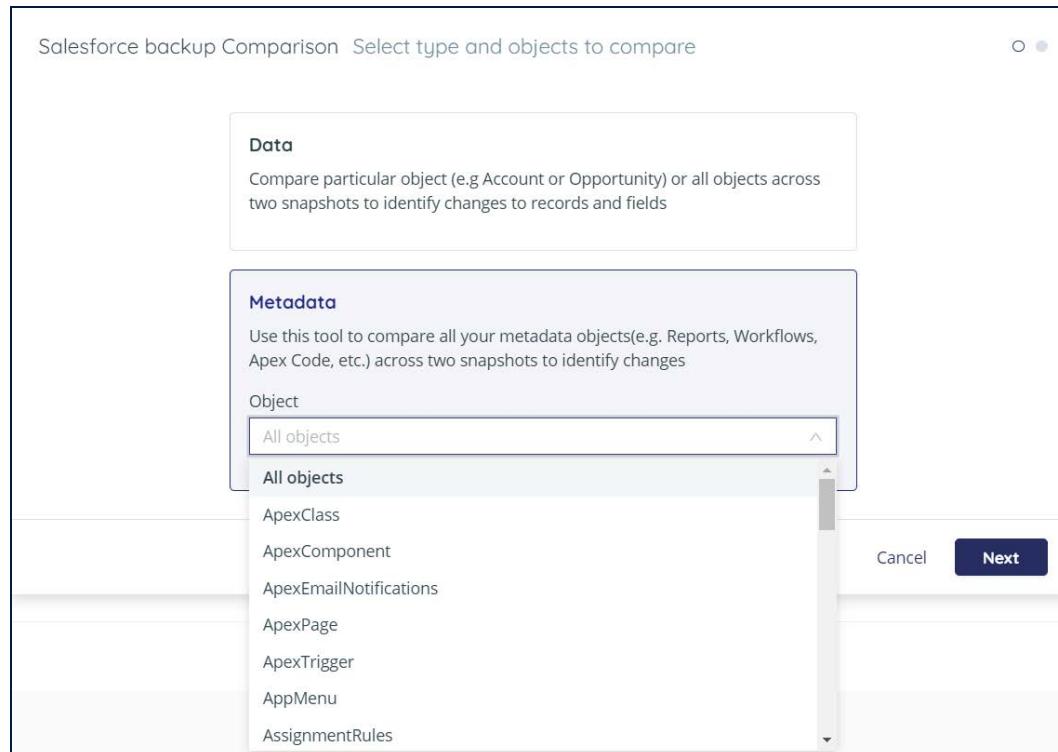
To initiate the metadata comparison procedure, follow these steps:



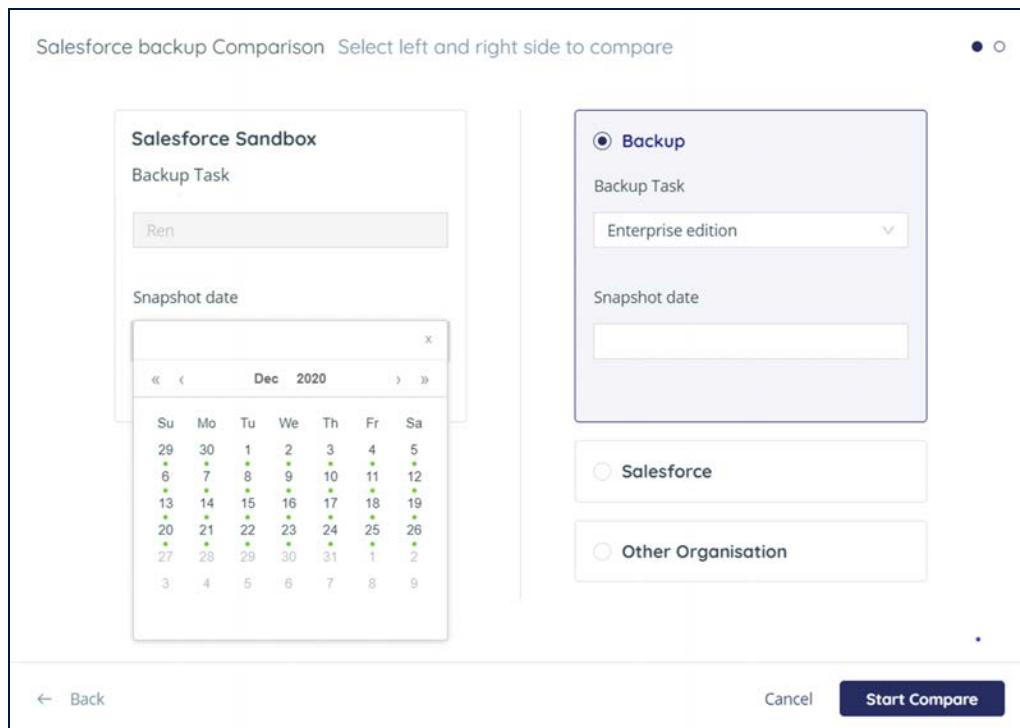
1. Click **Compare**.
2. The compare dialog screen is displayed. The data comparison option is selected by default. Select the **Metadata** option:



3. You can select which objects you want to compare. By default, all objects are compared during the operation. You can select an object from the drop-down menu:

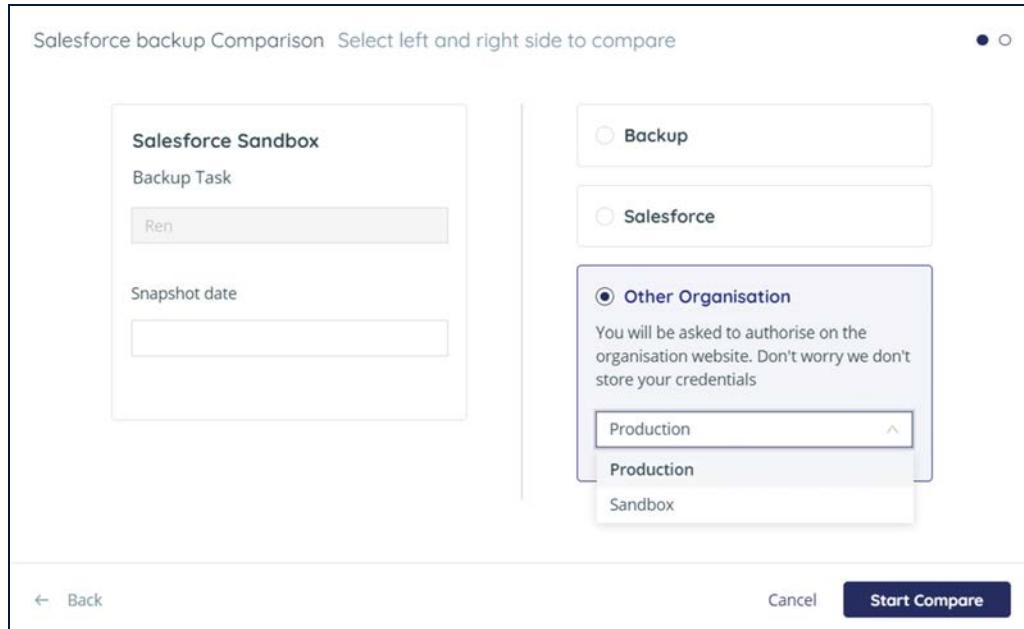


4. In the next step, you are prompted to select the date of the sources of the data for the comparison:

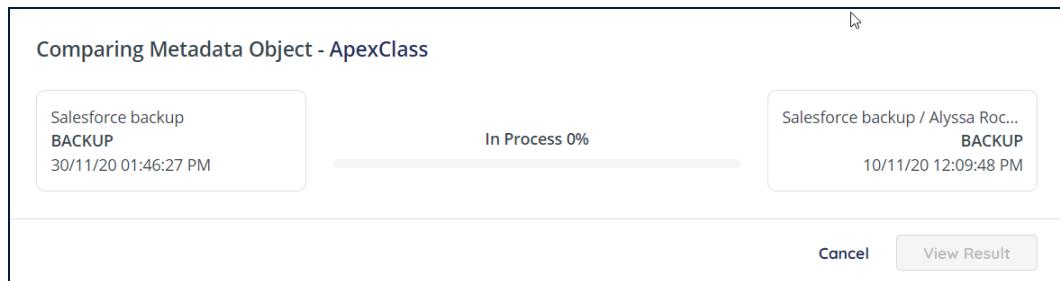


5. In the left panel of the page, select the date of the backup task for which you initiated the comparison. Below you can select the date of the backup, and, if more than one backup had been performed on the selected date, choose the time of the backup.
6. In the right panel, you can either select the backup task that will be used for comparison, the Salesforce production database, or metadata from another organization. In the latter case you can choose whether to use the production

database or the sandbox:



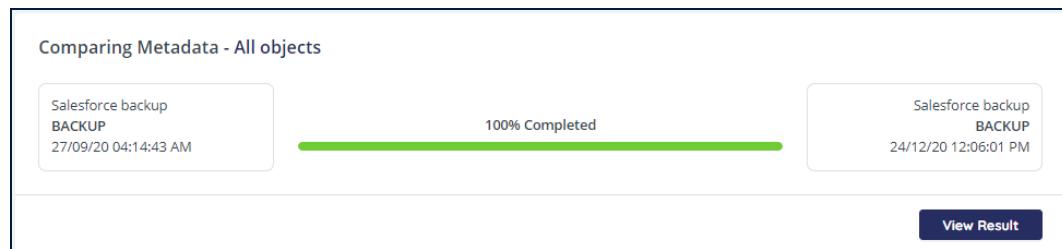
7. Once you have set the data sources click **Start Compare**. The comparison task is started in the background, and the results will be available as soon as it is finished.



8. You can cancel the task by clicking **Cancel** before it is finished.

6.2.2 Viewing the Metadata Comparison Results

Once the comparison task is finished, the **View Results** button becomes available.



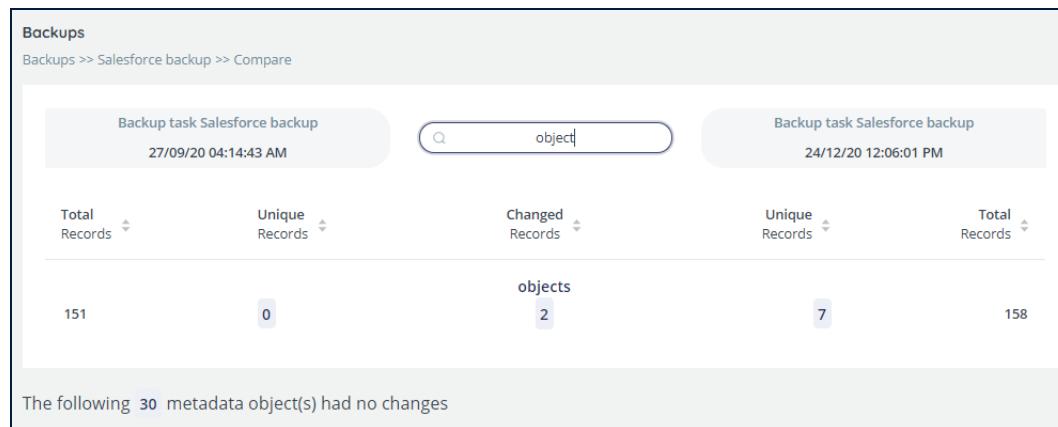
Clicking on **View Results** takes you to the *Compare* page:

The screenshot shows a comparison between two Salesforce backups. The left backup is from 27/09/20 04:14:43 AM and the right is from 24/12/20 12:06:01 PM. The table displays the following data:

Total Records	Unique Records	Changed Records	Unique Records	Total Records
sharingRules				
75	0	0	4	79
objects				
151	0	2	7	158
profiles				
34	0	34	0	34
layouts				
118	0	0	4	122
The following 30 metadata object(s) had no changes				

The comparison results are organized on the page in a table displaying the Total number of records, the number of Unique records in both the data sources, and the number of changed records for Objects and Profiles.

You can filter the page using the search bar situated in the top portion of the page:



Backups

Backups >> Salesforce backup >> Compare

Backup task Salesforce backup 27/09/20 04:14:43 AM

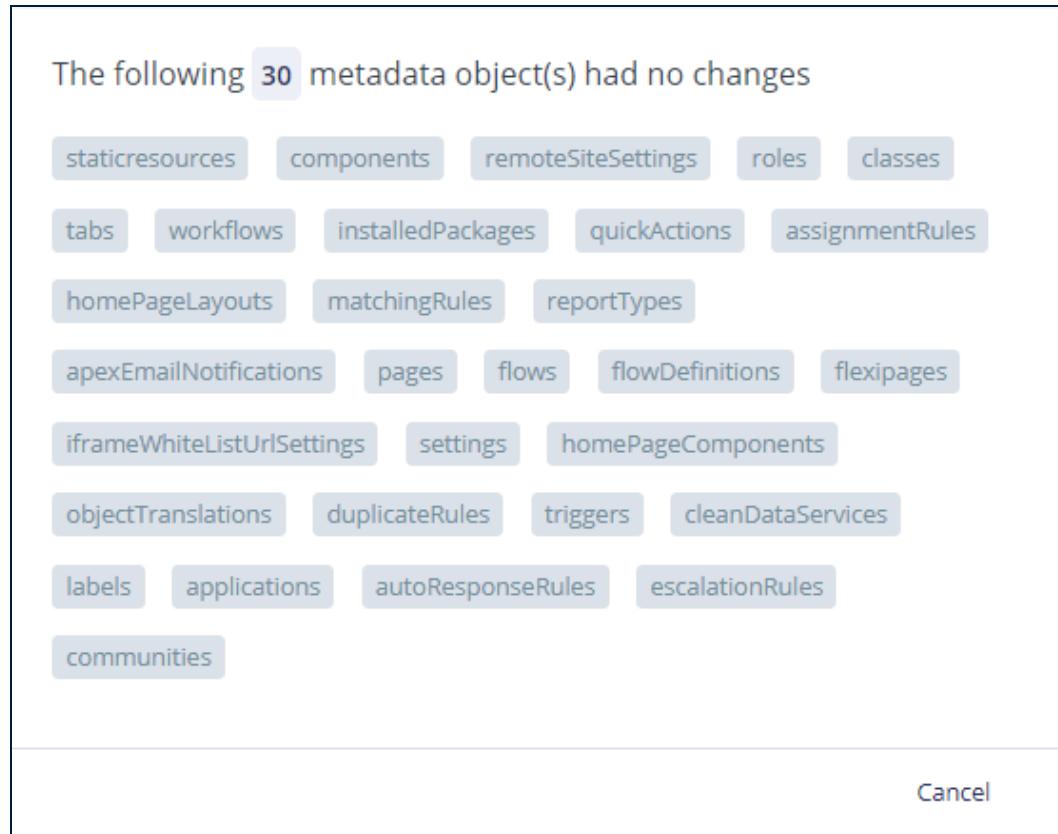
Backup task Salesforce backup 24/12/20 12:06:01 PM

object

Total Records	Unique Records	Changed Records	Unique Records	Total Records
151	0	2	7	158

The following 30 metadata object(s) had no changes

At the bottom of the page, you can find the summary of the number of objects that have no changes and the objects found only in one of the data sources. Clicking the numbers of such objects displays the list of corresponding objects:



The following 30 metadata object(s) had no changes

staticresources	components	remoteSiteSettings	roles	classes
tabs	workflows	installedPackages	quickActions	assignmentRules
homePageLayouts	matchingRules	reportTypes		
apexEmailNotifications	pages	flows	flowDefinitions	flexipages
iframeWhiteListUrlSettings	settings	homePageComponents		
objectTranslations	duplicateRules	triggers	cleanDataServices	
labels	applications	autoResponseRules	escalationRules	
communities				

Cancel

To find more details on the Unique or Changed elements you can click the corresponding numbers in the table. This leads you to the comparison GUI.

Backups	
Backups >> Salesforce backup >> Compare >> Profiles	
profiles 34 Changed Records	Download ALL
Admin.profile	Down ^
<pre> @@ -4744,6 +4744,11 @@ 4744 </fieldPermissions> 4745 <fieldPermissions> 4746 <editable>false</editable> </pre>	<pre> 4744 </fieldPermissions> 4745 <fieldPermissions> 4746 <editable>false</editable> 4747 + <field>Case.AssetWarrantyId</field> 4748 + <readable>false</readable> 4749 + </fieldPermissions> 4750 + <fieldPermissions> 4751 + <editable>false</editable> </pre>
<pre> 4747 <field>Case.BusinessHoursId</field> 4748 <readable>false</readable> 4749 </fieldPermissions> @@ -5093,6 +5098,16 @@ 5093 <readable>true</readable> 5094 </fieldPermissions> 5095 <fieldPermissions> </pre>	<pre> 4752 <field>Case.BusinessHoursId</field> 4753 <readable>false</readable> 4754 </fieldPermissions> 5098 <readable>true</readable> 5099 </fieldPermissions> 5100 <fieldPermissions> 5101 + <editable>false</editable> 5102 + <field>ContactPointAddress.PreferenceRank</field> 5103 + <readable>false</readable> 5104 + </fieldPermissions> 5105 + <fieldPermissions> 5106 + <editable>false</editable> 5107 + <field>ContactPointAddress.UsageType</field> 5108 + <readable>false</readable> 5109 + </fieldPermissions> 5110 + <fieldPermissions> 5111 <editable>true</editable> </pre>
5096 <editable>true</editable>	

You can expand any row of the table by clicking the downward-arrow button to view the comparison results, or you can download an archive with the corresponding objects via the download button. The records can be displayed side-by-side, or over-under. You can switch the orientation by clicking on the orientation button.

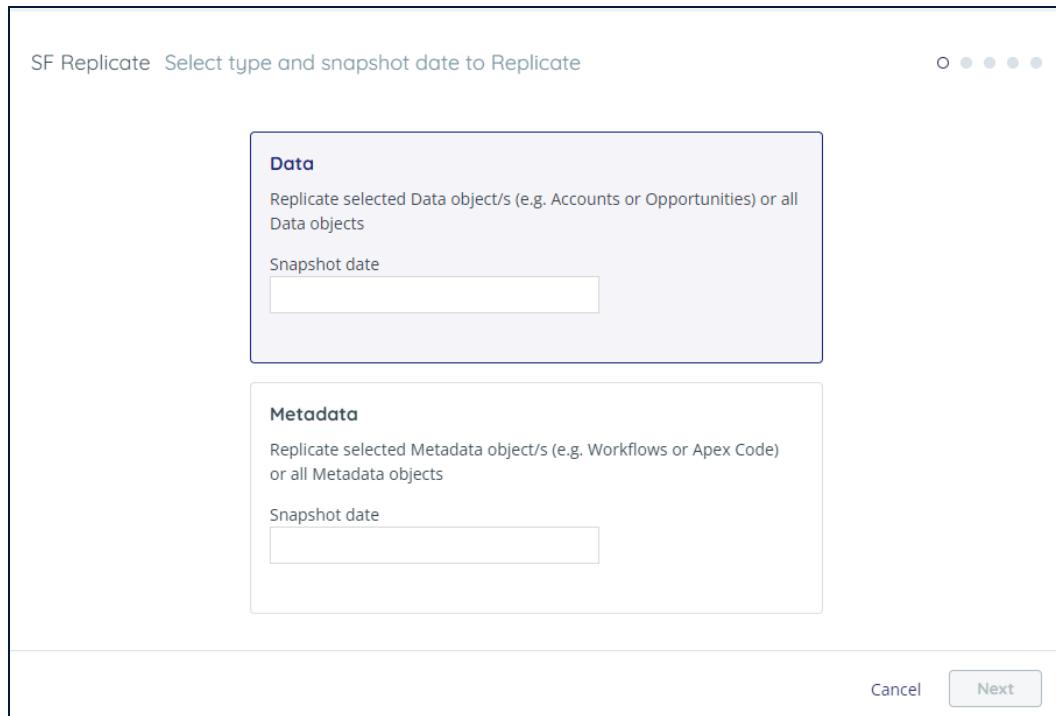
6.3 Replicating your Database

The Our backup service **Replicate** feature enables you to copy your data or metadata from your backup to a Salesforce sandbox database. The tool has a wide range of options and you can choose whether to copy all of the data or just selected objects, to apply various functions on the data, and to copy data to other Salesforce organizations.

You can access the **Replicate** tool by clicking the Salesforce backup task from the *Homepage*.

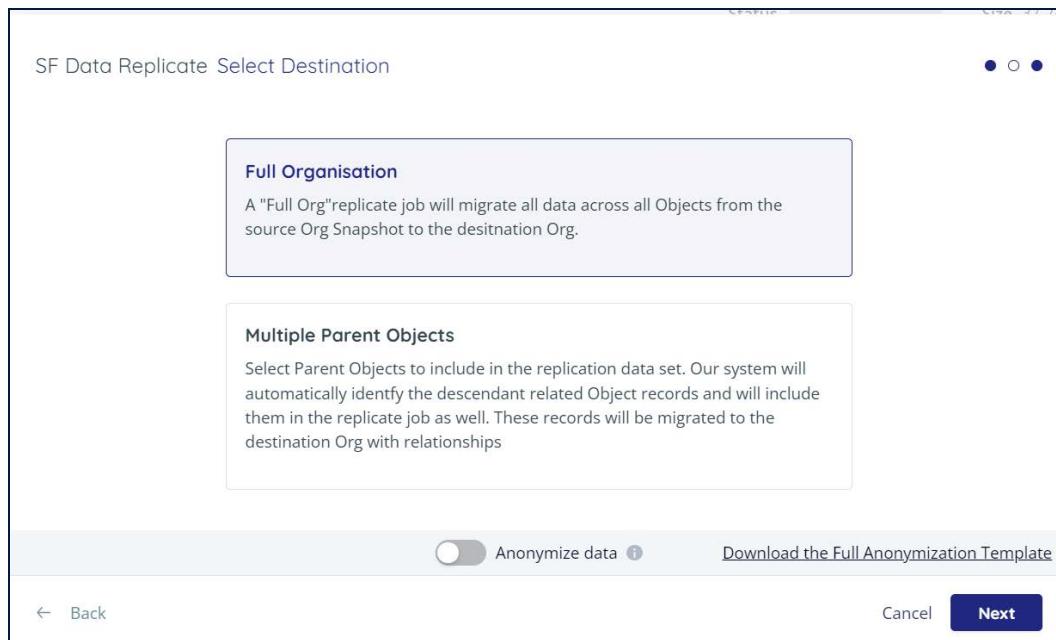


When you click Replicate, you will see the following screen:



6.3.1 Replicating Data

1. By default, **Data** is selected.
2. Choose the Snapshot date. If more than one backup was performed on the selected date, choose a backup time. Click **Next**.



You can choose whether you want to restore all data objects or select the objects to replicate.

- Select **Full Organization** if you want to restore all data objects. See [Full Organization Replication](#) below.
- Select the **Multiple Parent Objects** options to select the objects you want to be replicated and, if needed, apply selection filters on them. See [Multiple Parent Objects](#) below.

6.3.1.1 The Need to Anonymize Data

When you replicate part or all of your Production Salesforce data in your Sandbox, you may be exposing PII - Personally Identifiable Data. PII is information that can be used to identify, contact, or locate a person, such as their name, social security number, birthdate, or contact details. PII is extremely lucrative to hackers and is the main target of ransomware and malware attacks. Data security best practices and global regulatory laws including the GDPR, CCPA, HIPAA, and PIPEDA, mandate stringent protection and anonymization of PII by organizations.

6.3.1.2 Data Anonymization in Our backup service Salesforce Data Replication

Our backup service supports your efforts to anonymize your Salesforce data by providing a toggle switch that turns data anonymization on and off.



Anonymization Using the Default Template

By default, our backup service will anonymize your data using a template, that defines which data will be replaced by which type of values:

- Some of your data will be replaced with pre-set typical values, such as Last Name = Smith, or Address = 123 Main Street. The data will keep its original format, to ensure that it can be safely used for integration.
- Other data will be replaced with meaningless characters, such as notes or comments.

To learn the details of how each data field will be anonymized using the template, click **Download the Full Anonymization Template** to view the full list in an Excel format. As you will see, our backup service sets the most frequently-used fields, with the appropriate information (pre-set values or random data). The template is an excellent solution for most System Administrators.

Customization of Anonymized Data

For some advanced users who want to delve into the details, instead of accepting the default template, you can change how each object is handled.

- To see how to customize anonymized data for a **Full Organization Replication**, click [here](#).
- Click [here](#) to see how to customize anonymized data for a **Multiple Parent Objects Replication**, click [here](#).

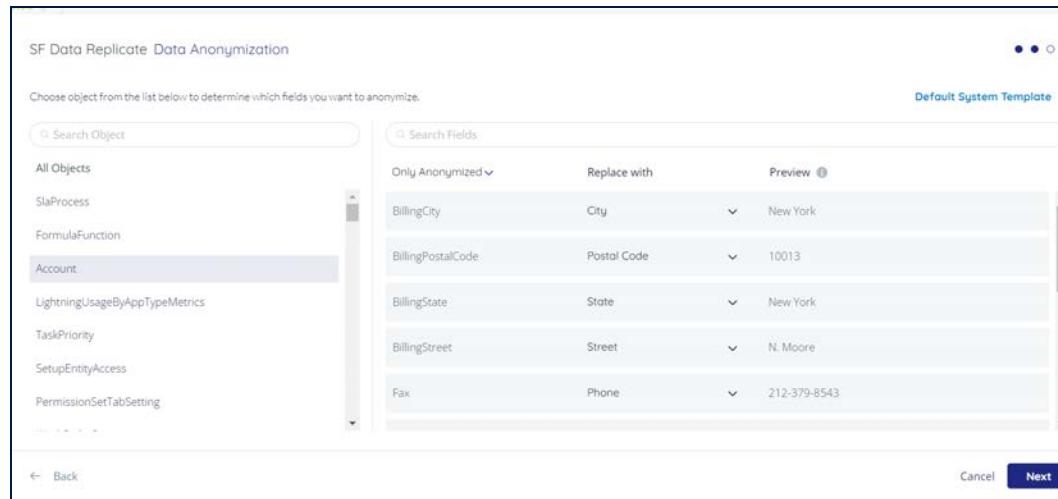
6.3.1.3 Full Organization Replication

After selecting the snapshot date, click **Full Organization** and then click **Next**.

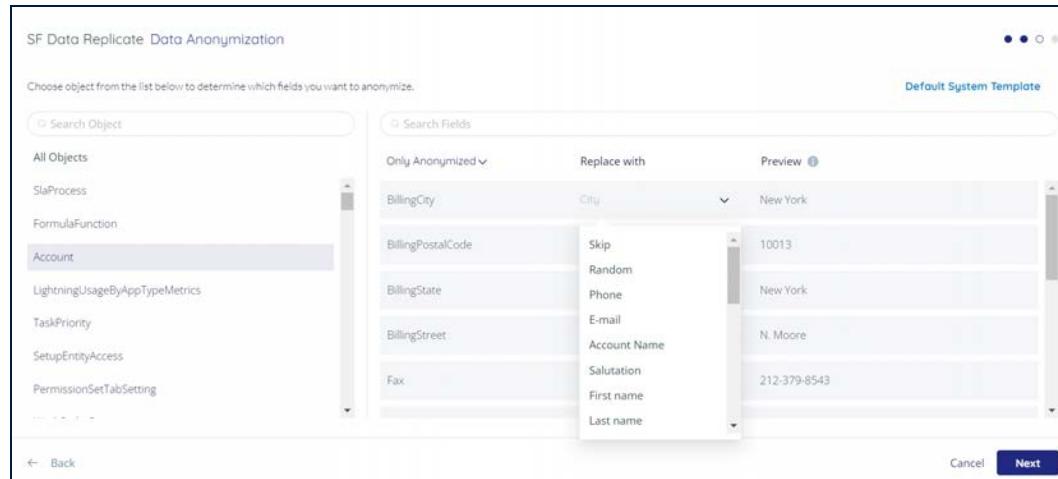
Anonymizing Data

Click the toggle to turn **Anonymize data** on. By default, our backup service will use the Anonymization Template, which sets either fake or random values for the most commonly-used objects and fields. If you would like to delve into the details to customize your anonymized fields, you can do so on the screen after you click **Next**.

You will see the following screen:

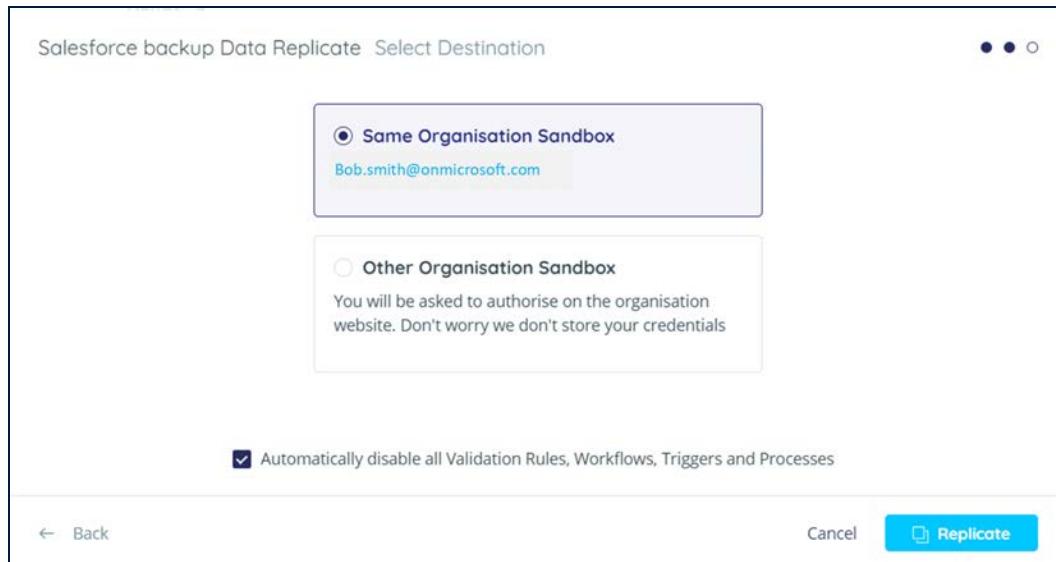


- The left side of the screen contains all of the objects in your data set.
- The right side of the screen lists all of the fields in the highlighted object. Here, for each field, you can determine whether you want to:
 - Skip this field (it won't be anonymized)
 - Replace it with random characters
 - Or, replace it with one of the pre-defined fields in the template.



When you are done customizing your fields, click **Next**.

Select the destination of the replicated data. You can replicate the data to a sandbox of the original organization or you can send it to a sandbox of a different organization. In the latter case, you will be asked to authorize the operation with the credentials of the destination organization.



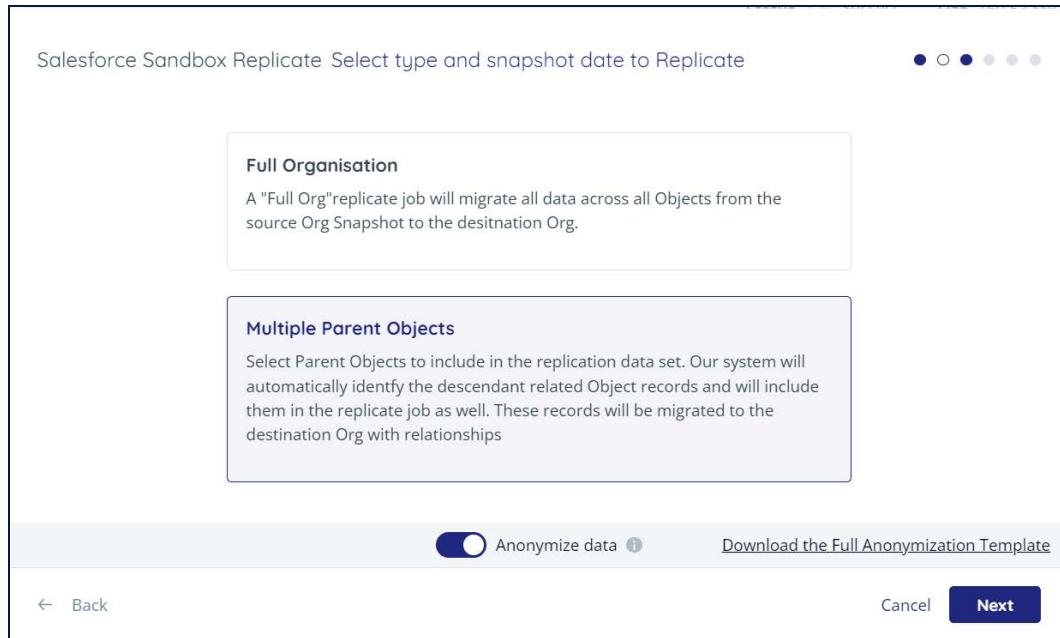
You can unmark the checkbox **Automatically disable all Validation Rules, Triggers, and Processes** if you want these elements to be enabled in the replicated data. By default, the checkbox is marked, thus disabling the validation of rules, workflows triggers, and processes. This is done as a precaution because the said elements may not work well with replicated data. After the restoration process concludes, all Validation Rules, Workflows, Triggers, and Processes are automatically reactivated.

Click **Replicate** to create the replication task. The task will be assigned to the next available processing machine, which may take several minutes. You can view the progress of the task in the Replicates tab of the backup page.



6.3.1.4 Multiple Parent Objects

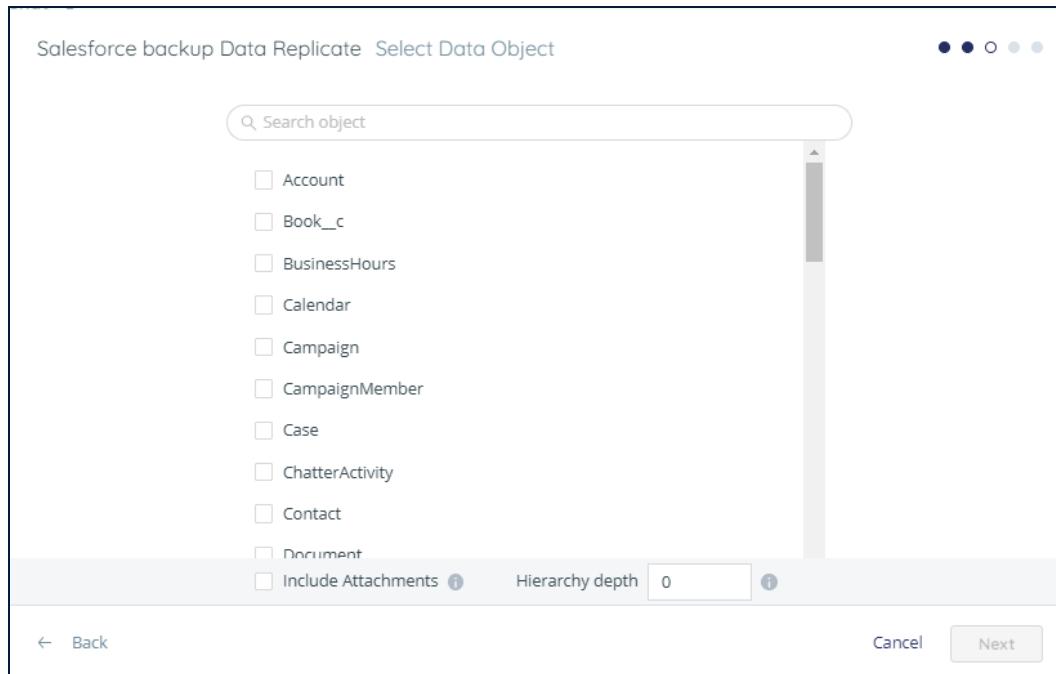
After selecting the snapshot date, select **Multiple Parent Objects** and click **Next**.



Anonymizing Data

Click the toggle to turn **Anonymize data** on. By default, our backup service will use the Anonymization Template, which sets either fake or random values for the most commonly-used objects and fields. If you would like to delve into the details to customize your anonymized fields, you can do so after you click **Next**.

You are taken to the step: **Select Data Object**:



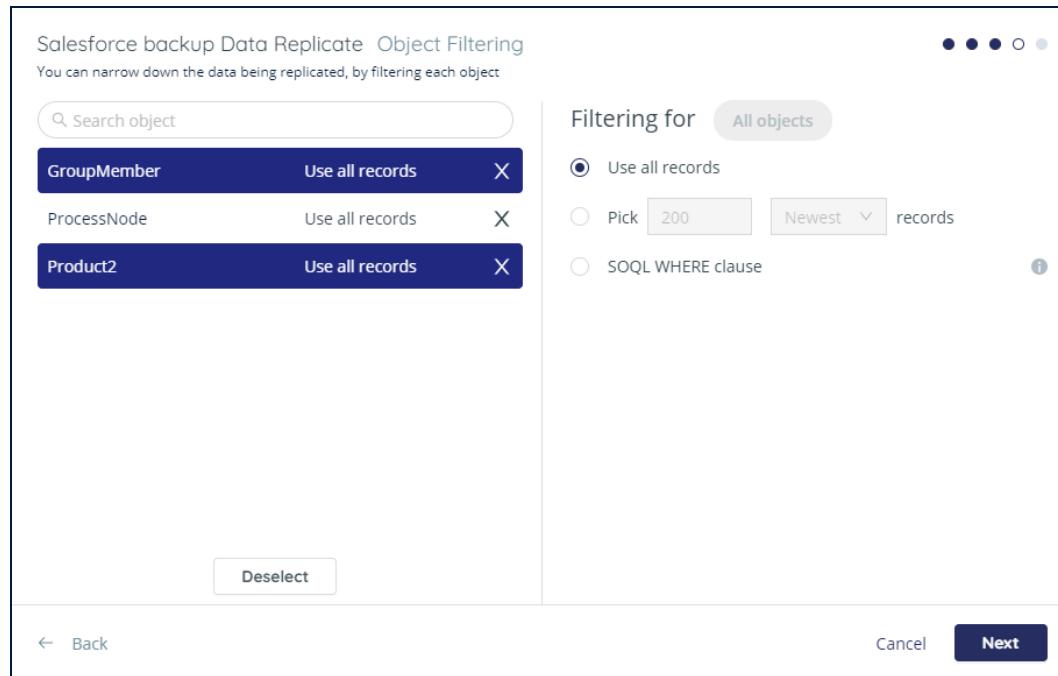
Select the objects you want to replicate. You can search by typing at least 3 symbols matching part of the name of the object.

Click the checkbox **Include attachments** if you want the restored data objects to contain all original attachments.

The **Hierarchy depth** field refers to the objects that are dependent on the selected objects. By default, the **Hierarchy depth** is set to 0, meaning only the selected objects will be replicated.

You can set the Hierarchy depth to the desired depth, up to 7 levels: all objects dependent on the selected objects up to the selected depth will be marked for the next step.

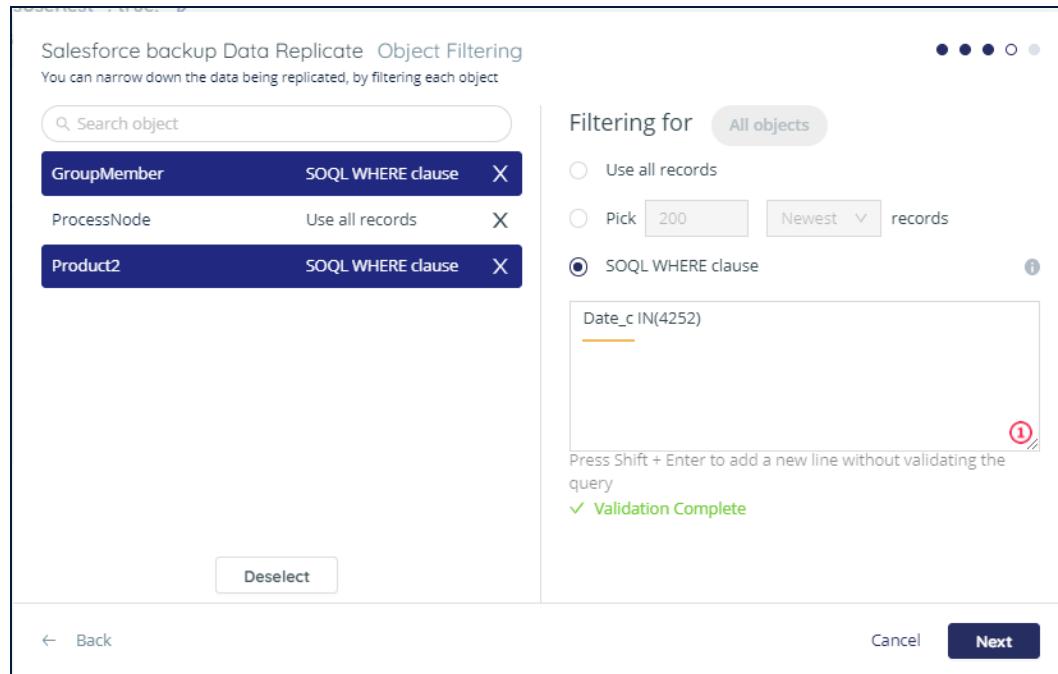
By default, all records are selected for replication in the selected Objects. You can set up selection rules manually for any number of objects. To select multiple objects, click the corresponding lines in the list. You can define different rules for the objects – deselect the objects for which you have already set up the selection and select the other ones.



To define the number of records that need to be replicated, click the option **Pick <number> records**. You can fill in the number of records to be replicated and choose one of the options: Newest, Oldest, or Random:

You can define the SOQL WHERE query that will be applied to select the records for replication. To do that click the SOQL WHERE clause option, fill in the query and click **Enter** to validate it.

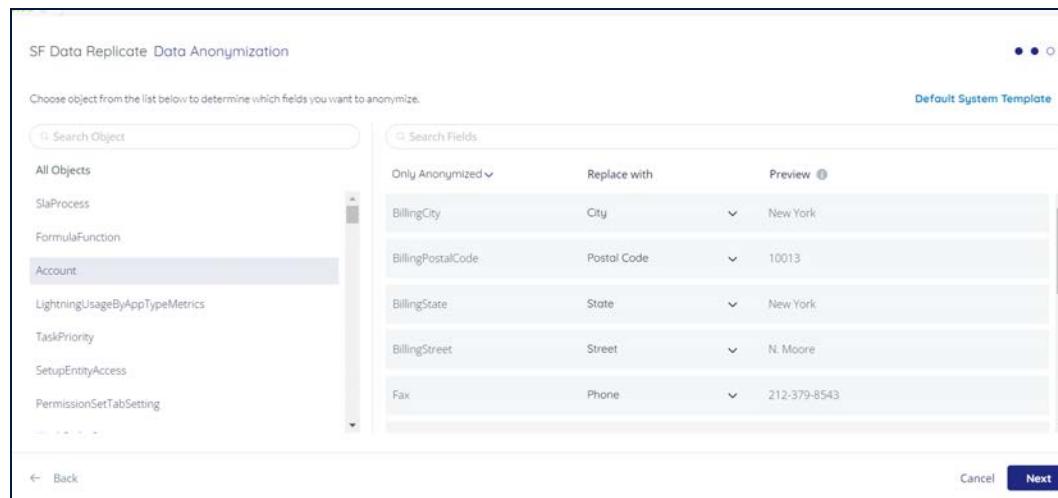
Note: The replication system only validates the query syntax and doesn't check that the query can be applied to the selected objects. An inapplicable SOQL clause may lead to a failure in the replication procedure.



Click Next.

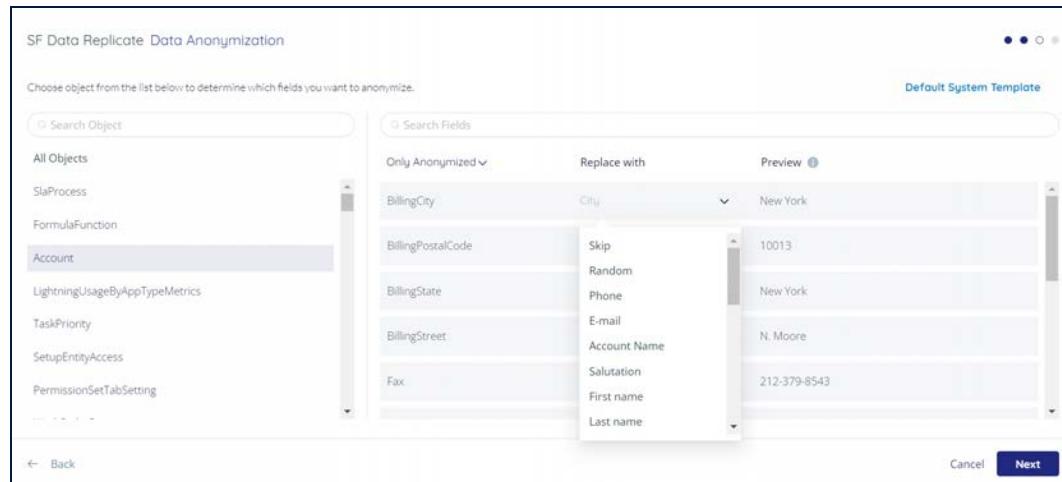
Customizing Data Anonymization Fields

You will see the following screen:



- The left side of the screen contains all of the objects in your data set.
- The right side of the screen lists all of the fields in the highlighted object. Here, for each field, you can determine whether you want to:

- Skip this field (it won't be anonymized)
- Replace it with random characters
- Or, replace it with one of the pre-defined fields in the template.

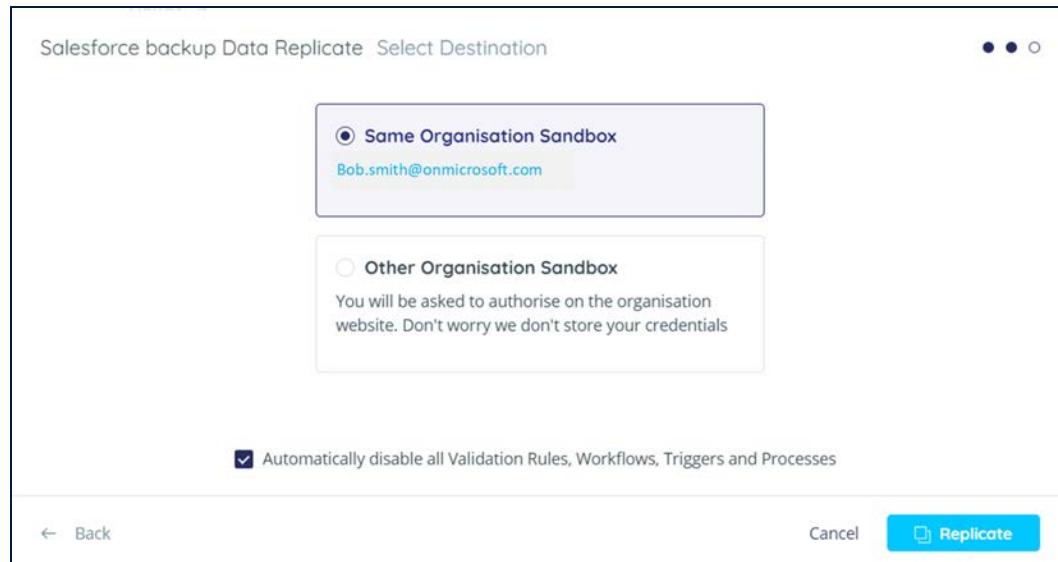


When you are done customizing your fields, click **Next**.

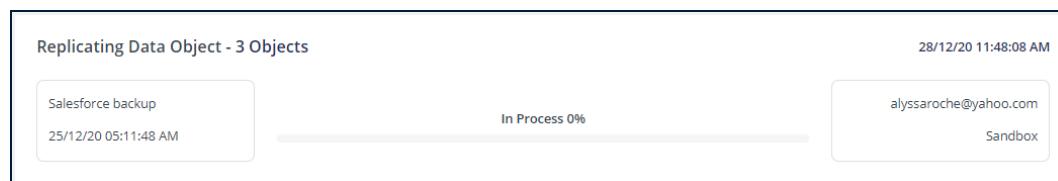
You are taken to the **Select Destination** step.

Select the destination of the replicated data. You can replicate the data to a sandbox of the original organization or you can send it to a sandbox of a different organization. In the latter case, you will be asked to authorize the operation with the credentials of the destination organization.

You can unmark the checkbox **Automatically disable all Validation Rules, Triggers, and Processes** if you want these elements to be enabled in the replicated data. By default, the checkbox is marked, thus disabling the validation rules, workflows triggers, and processes. This is done as a precaution because the said elements may not work well with replicated data. After the restoration process concludes, all Validation Rules, Workflows, Triggers, and Processes are automatically reactivated.



Click **Replicate** to create the replication task. The task will be assigned to the next available processing machine - this may take several minutes. You can view the progress of the task in the *Replicates* tab of the backup page.



6.3.2 Replicating Metadata

To initiate the metadata comparison procedure, follow these steps:



1. Click **Replicate**. The Replicate screen is displayed.

SF Replicate Select type and snapshot date to Replicate

○ ● ● ●

Data
Replicate selected Data object/s (e.g. Accounts or Opportunities) or all Data objects
Snapshot date

Metadata
Replicate selected Metadata object/s (e.g. Workflows or Apex Code) or all Metadata objects
Snapshot date

Cancel Next

1. The Data option is selected by default. Select the **Metadata** option, choose a snapshot date, and click **Next**.

SF Metadata Replicate Select Metadata Object

● ○ ● ●

Full Organisation
A "Full Org" replicate job will migrate all Metadata from the source Org Snapshot to the destination Org.

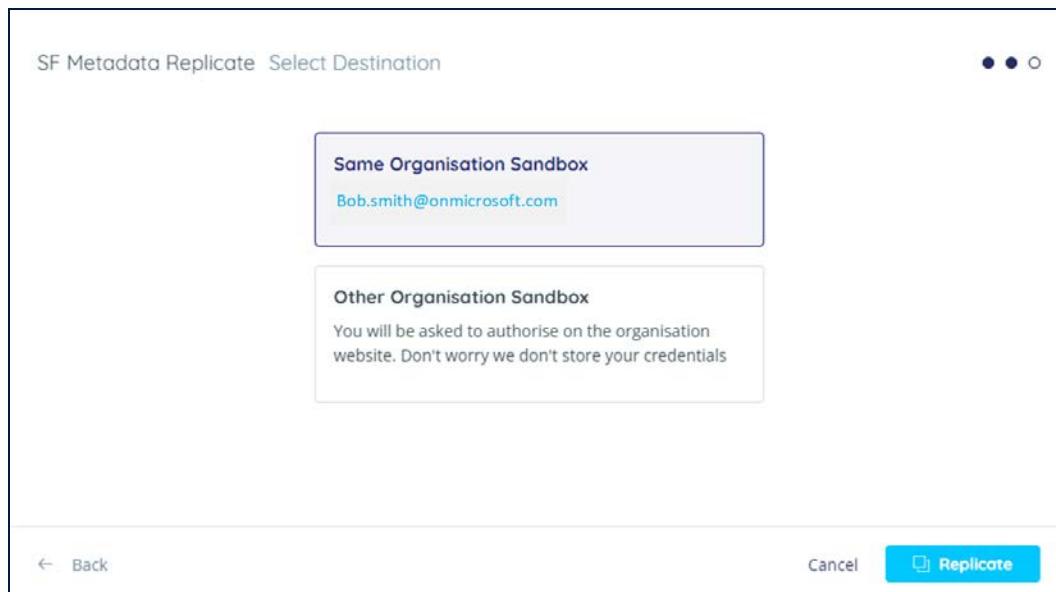
Granular Selection
Select one or more Metadata Types to include in the replication data set.

← Back Cancel Next

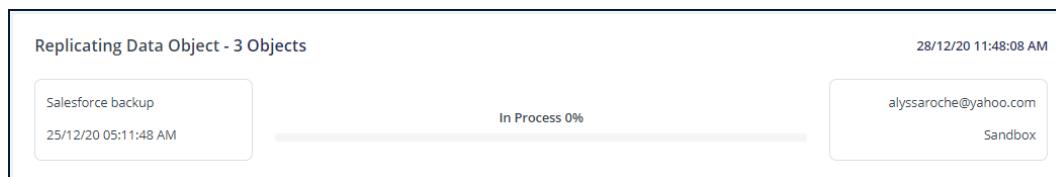
Choose either **Full Organization**, to migrate all metadata from the source organization snapshot to the destination organization, or **Granular Selection**, to select which metadata types to include in the replication data set.

6.3.2.1 Full Organization

Select the destination of the replicated data. You can replicate the data to a sandbox of the original organization or you can send it to a sandbox of a different organization. In the latter case, you will be asked to authorize the operation with the credentials of the destination organization.

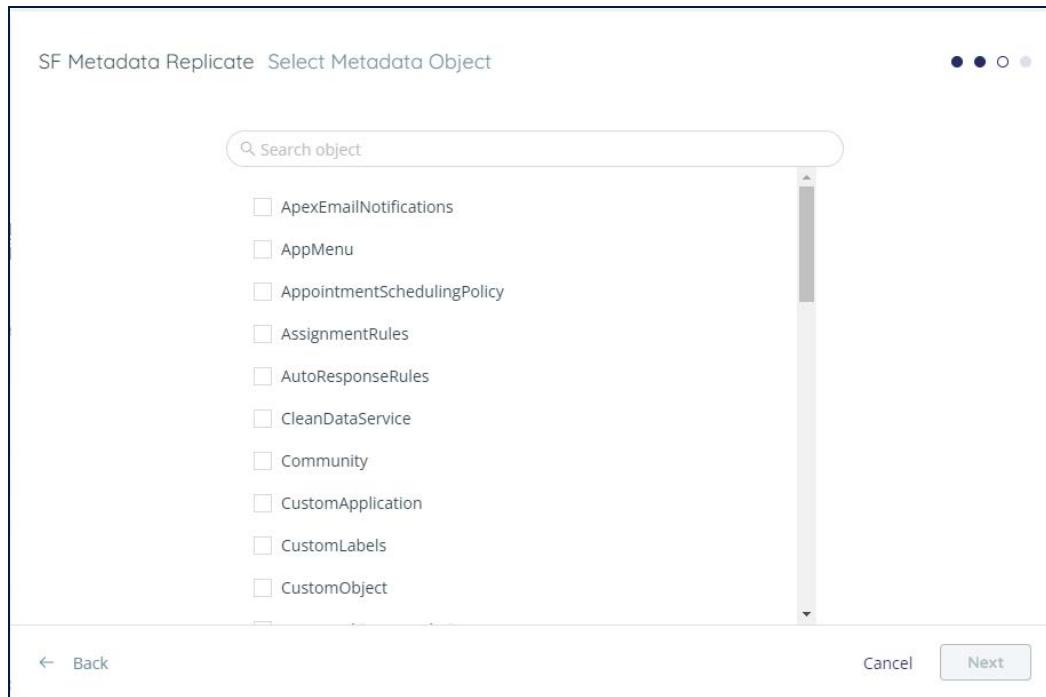


Click **Replicate** to create the replication task. The task will be assigned to the next available processing machine - this may take several minutes. You can view the progress of the task in the *Replicates* tab of the backup page.



6.3.2.2 Granular Selection

Choose **Granular Selection**. You are taken to a screen where you can select which metadata objects you would like to duplicate:



Make your selection(s), and click **Next**. You are taken to the **Select Destination** step.

Select the destination of the replicated data. You can replicate the data to a sandbox of the original organization or you can send it to a sandbox of a different organization. In the latter case, you will be asked to authorize the operation with the credentials of the destination organization.

Click **Replicate** to create the replication task. The task will be assigned to the next available processing machine - this may take several minutes. You can view the progress of the task in the *Replicates* tab of the backup page.



6.4 Smart Alerts

6.4.1 Anomaly Detection

How can you minimize the damage of a mistaken Sandbox refresh, unwanted database update, buggy code insert, bad data imports, or a mistaken deletion or updating records? By reducing the time it takes you to detect the red flag – your Recovery Time Objective (RTO) – and restoring your Salesforce data ASAP.

Our backup service's Salesforce Backup comes with Anomaly detection that alerts you of suspicious activity – updates or deletes – to your Salesforce data.

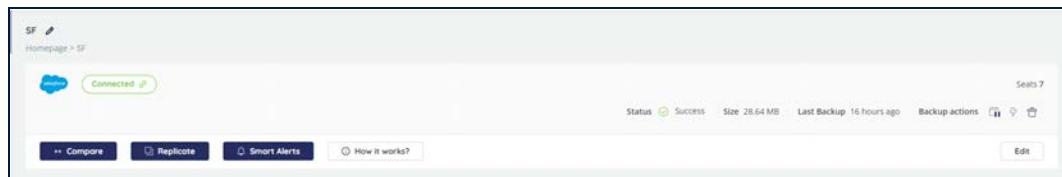
- Customize Smart Alerts to detect irregular objects changes such as addition, deletion, or updates between backup snapshots, based on your predefined threshold.
- Get email notifications with a snapshot report of Salesforce objects changes that triggered the Smart alert.
- Use historical backup snapshots to quickly restore your data to any point-in-time or keyword/metadata search for granular recovery.

6.4.2 Setting a Smart Alert

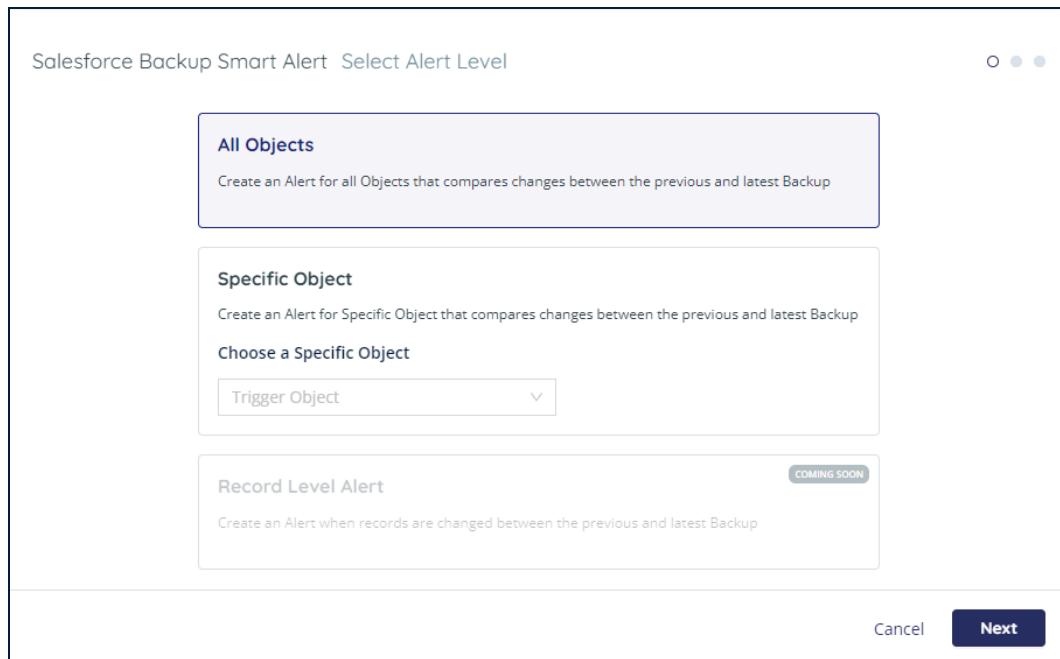
Smart Alerts enable you to compare changes between the previous and latest backups, and to alert you when significant changes are detected. You can determine which changes are "significant."

Note: Before you can set a smart alert, you must have at least one successful Salesforce backup that our backup service can use as the baseline for future comparisons. See [Creating a New Backup Task](#).

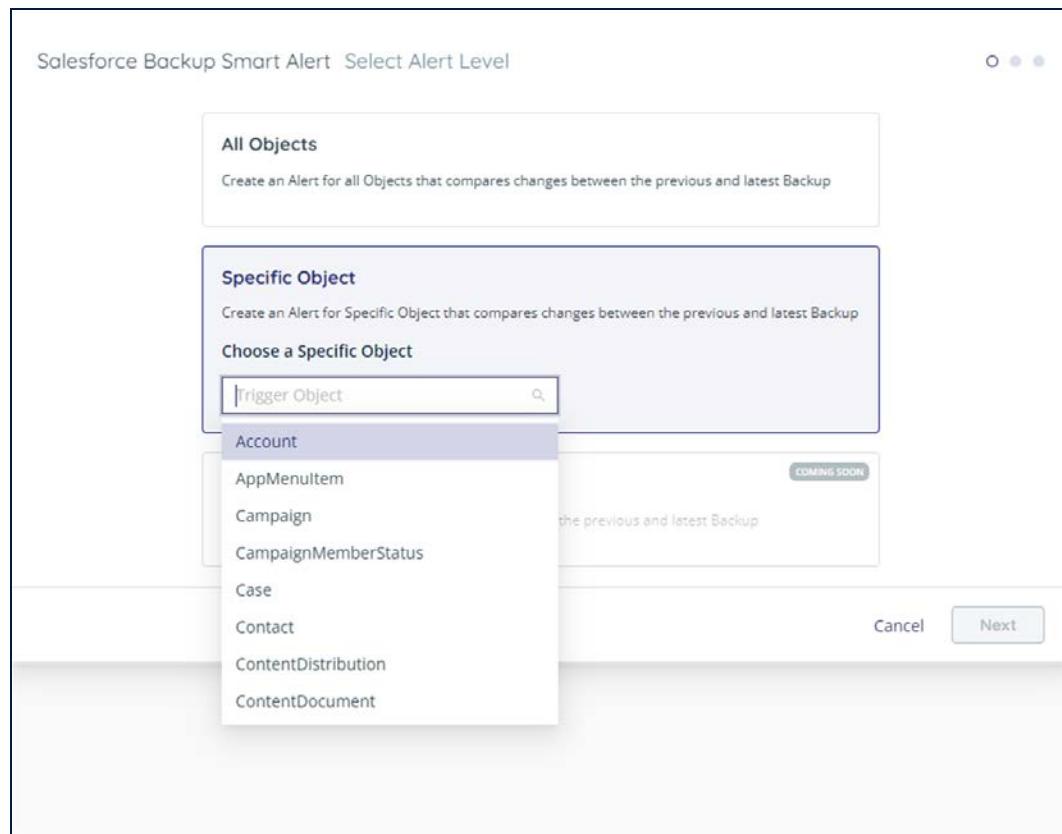
1. From the *Homepage*, click the Salesforce backup task. Click **Smart Alerts**.



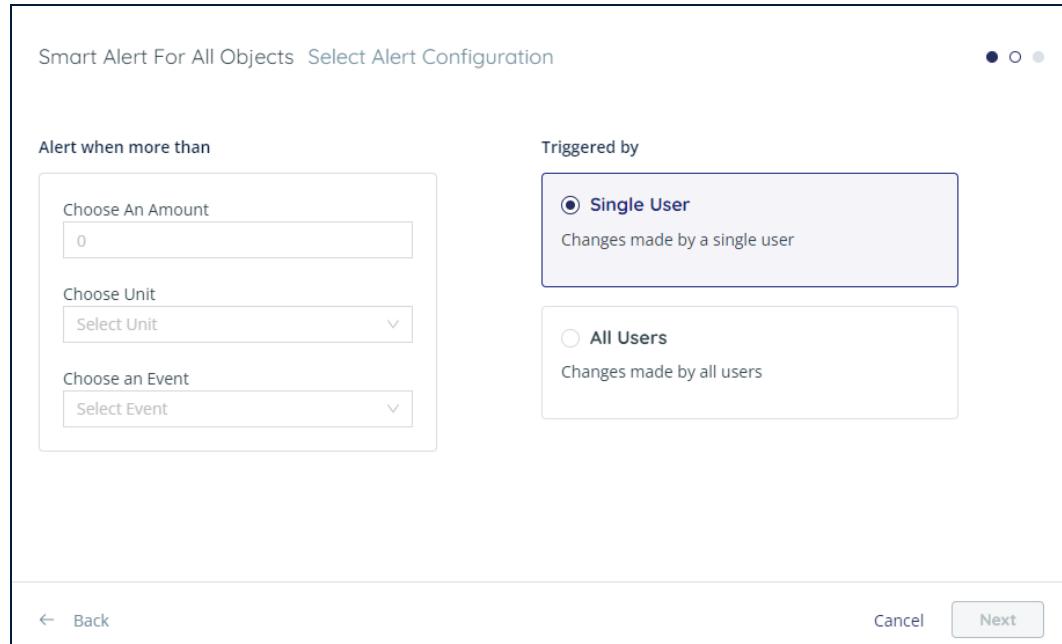
2. By default, **All Objects** are selected. If this is your preference, click **Next**.



3. If you prefer to choose which objects will trigger an alert, click **Specific Object**.
4. Choose the object from the drop-down list that you would like to trigger the alert. You can only choose one object per smart alert. When you have made your selection, click **Next**.



5. You will be directed to the configuration screen, which enables you to set the criteria for when you will receive an alert:



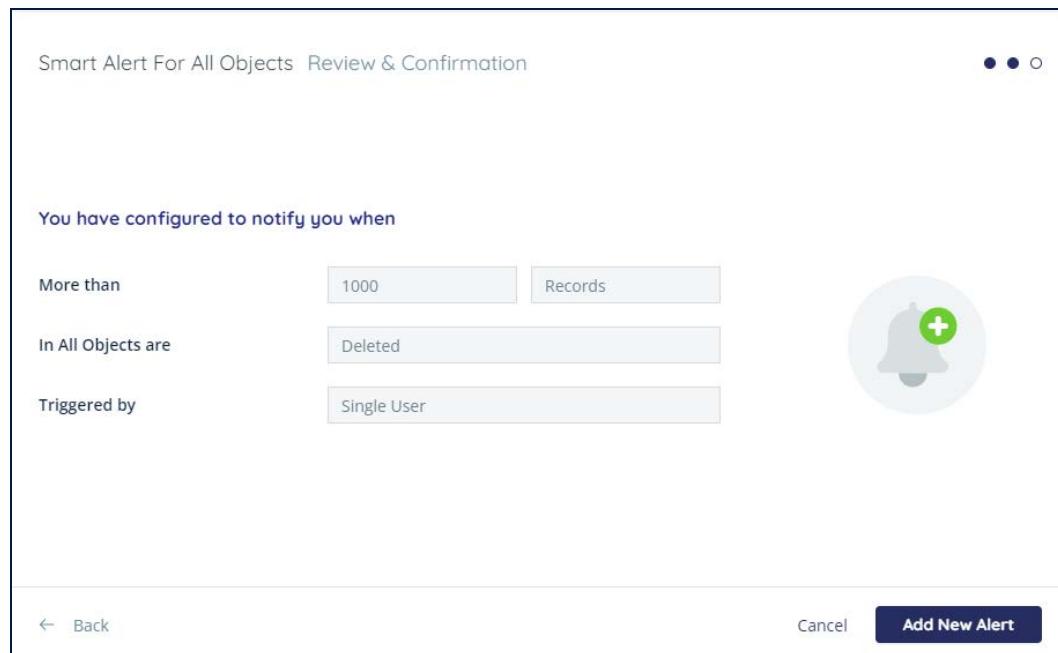
- Alert when more than:
 - Number of items
 - Either % or number of records
 - Is added, updated, or deleted

Note: If you choose a low **Amount** value, our backup service will display a warning: "You have created an alert with very wide criteria. This means you will probably receive an alert after each backup cycle. Are you sure you want to proceed?"

- You can choose whether you'd like your alert to be triggered by a single user's changes or when ALL users have made this change, as defined in the "Alert when more than..." panel.

Note: Which option is preferable, changes made by a single user or all users? It depends on the volume of records in your organization's Salesforce database, the record volatility, and the data sensitivity.

- When you are done, confirm your configuration, and click **Add New Alert**.



6.4.3 Smart Alert List

After you click **Add New Alert**, our backup service adds the new alert to the Smart Alert list.

A screenshot of a Salesforce page titled "Smart Alerts" under the "Objects" tab. It shows a list of four existing smart alerts. Each alert is defined by a trigger object (All Objects, Campaign, Document, Task), a rule (More than), and a unit (Records). The alerts are triggered when records are deleted, and the triggered by user is a single user. The page includes a search bar, filter buttons for "Event", "Triggered By", and "Action", and a "Add New Alert" button.

From this page, you can change the values in a Smart Alert - the Amount, the % or Number of Records, or the type of change - by clicking the pencil icon. However, it is not possible to switch from Single User to All Users - you'll need to create a new Smart Alert to do so.

You can also delete an alert by clicking **Action > Delete**.

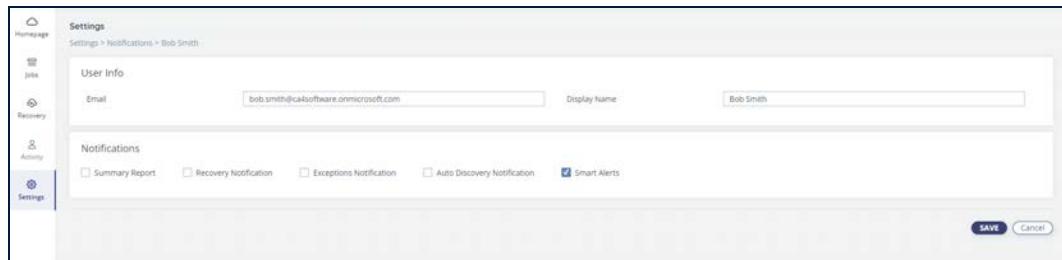
Finally, you can disable or enable an alert, by clicking the bell icon.

6.4.4 Smart Alert Notifications

By default, Smart Alert notifications are sent to the primary account user, but additional recipients can be added.

To add additional recipients:

1. From the Navigation Panel click **Settings > Notifications**.
2. Click **+Add New Recipient**, add a user's email address and name, and then click **Save**.



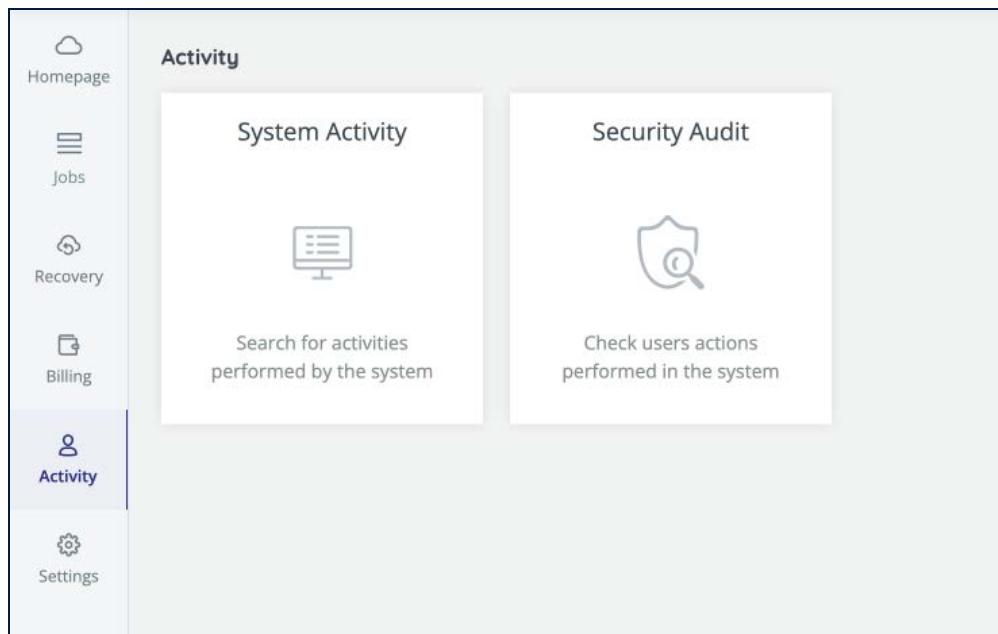
When changes trigger a Smart Alert, all of the users on the list will receive an email that summarizes what has changed. With this information, Admins can investigate the changes, and take appropriate action.

7 Managing Your Account

This section guides you through the processes of managing your Account activity, account settings, password, setting up two-factor authentication, and managing users.

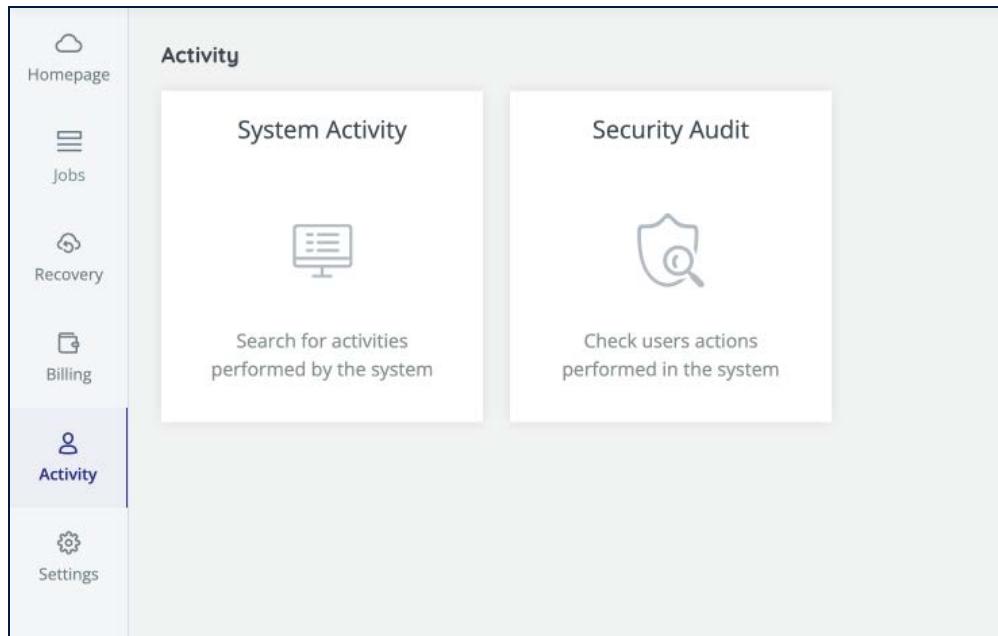
7.1 Viewing Account Activity

The Activity menu enables you to view your account activity, including System Activity and Security Audit. Click *Activity* on the navigation pane.



7.1.1 System Activity

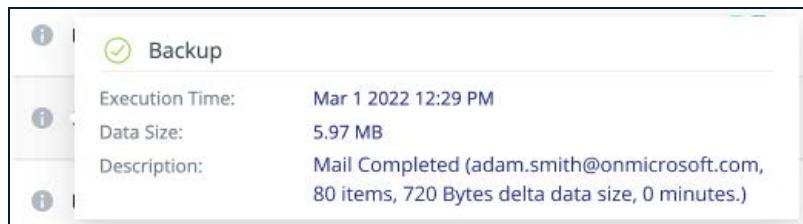
Click System Activity.



The System Activity page displays your account activity, with details such as Activity, Date and Time, Service, Sub-Service, Status, Task Name, and Item.

Activity	Date and Time	Service	Sub Service	Status	Task Name	Item
Export	Jul 12 2022 04:08 PM	Calendars		Succeeded	Full MS Exchange Backup / bob.smith@ca4software.onmicrosoft.com	bob.smith@ca4software.onmicrosoft.com
Backup	Jul 11 2022 01:01 PM	Sharepoint		Succeeded	Sharepoint backup	.../sites/AltaroRestored_Shared_mailbox_2021_08_31_11_05
Export	Jul 11 2022 01:00 PM	Channels		Succeeded	Full Teams Backup / AltaroRestored_Linda_Fuller_2021_08_31_05_36	AltaroRestored_Linda_Fuller_2021_08_31_05_36
Restore	Jul 11 2022 01:00 PM	One Drive		Succeeded	One Drive / cloudally1-my.sharepoint.com	.../2sepo_kazandev_pro
Backup	Jul 11 2022 05:04 AM	Calendars		Failed	Full MS Exchange Backup	Mila.Scott@ca4software.onmicrosoft.com
Backup	Jul 6 2022 05:06 AM	Notes		Succeeded	Full MS Exchange Backup	Jacob.Anderson@ca4software.onmicrosoft.com
Backup	Jul 6 2022 05:06 AM	Notes		Succeeded	Full MS Exchange Backup	Agata.Brown@ca4software.onmicrosoft.com
Backup	Jul 6 2022 05:06 AM	Notes		Succeeded	Full MS Exchange Backup	Alex.Duglas@ca4software.onmicrosoft.com
Backup	Jul 6 2022 05:06 AM	Notes		Succeeded	Full MS Exchange Backup	Sarah.Johnson@ca4software.onmicrosoft.com
Backup	Jul 6 2022 05:06 AM	Notes		Succeeded	Full MS Exchange Backup	Jessica.Miller@ca4software.onmicrosoft.com
Backup	Jul 6 2022 05:06 AM	Notes		Succeeded	Full MS Exchange Backup	Charles.Wilson@ca4software.onmicrosoft.com

This page enables you to filter and search the list of backup tasks, export the list as a CSV file, and view more details on any backup task. The latter can be achieved by clicking the Info icon. The Info pop-up displays the backup execution time, the size of the stored data, and the number of entities, and the summary of the backup execution:

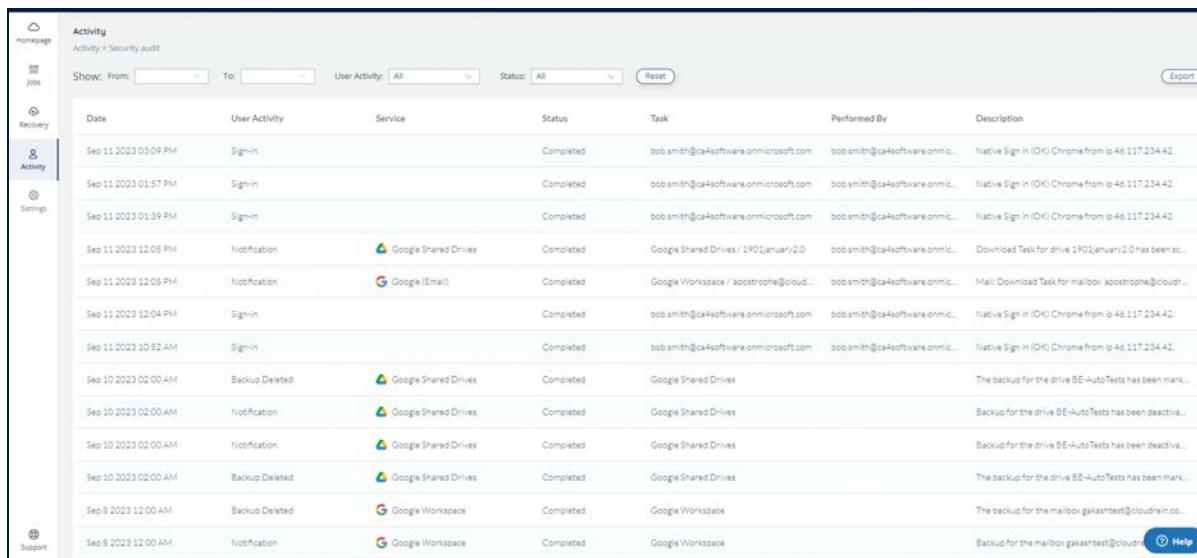


7.1.2 Security Audit

The *Security Audit* page provides information about all the security-related actions that have happened in your account. The user activity that is displayed includes:

- Backup deleted
- User deactivated
- Settings changed
- Sign-in success or failure
- Permissions changed
- Notifications.

The page includes the date of the event, the type of activity, the service involved, the status of the activity, the account performing the activity, and the description.



Activity						
Activity > Security audit						
Date	User Activity	Service	Status	Task	Performed By	Description
Sep 11 2023 03:09 PM	Sign-in		Completed	bob.smith@ca4software.onmicrosoft.com	bob.smith@ca4software.onmicrosoft.com	Native Sign in (OK) Chrome from ip 46.117.234.42.
Sep 11 2023 01:57 PM	Sign-in		Completed	bob.smith@ca4software.onmicrosoft.com	bob.smith@ca4software.onmicrosoft.com	Native Sign in (OK) Chrome from ip 46.117.234.42.
Sep 11 2023 01:39 PM	Sign-in		Completed	bob.smith@ca4software.onmicrosoft.com	bob.smith@ca4software.onmicrosoft.com	Native Sign in (OK) Chrome from ip 46.117.234.42.
Sep 11 2023 12:05 PM	Notification	Google Shared Drives	Completed	Google Shared Drives / 1901january2.0	bob.smith@ca4software.onmicrosoft.com	Download Task for drive 1901january2.0 has been ac...
Sep 11 2023 12:05 PM	Notification	Google (Email)	Completed	Google Workspace / apostrophe@cloud...	bob.smith@ca4software.onmicrosoft.com	Mail: Download Task for mailbox apostrophe@cloud...
Sep 11 2023 12:04 PM	Sign-in		Completed	bob.smith@ca4software.onmicrosoft.com	bob.smith@ca4software.onmicrosoft.com	Native Sign in (OK) Chrome from ip 46.117.234.42.
Sep 11 2023 10:52 AM	Sign-in		Completed	bob.smith@ca4software.onmicrosoft.com	bob.smith@ca4software.onmicrosoft.com	Native Sign in (OK) Chrome from ip 46.117.234.42.
Sep 10 2023 02:00 AM	Backup Deleted	Google Shared Drives	Completed	Google Shared Drives		The backup for the drive BE-AutoTests has been mark...
Sep 10 2023 02:00 AM	Notification	Google Shared Drives	Completed	Google Shared Drives		Backup for the drive BE-AutoTests has been deactiva...
Sep 10 2023 02:00 AM	Notification	Google Shared Drives	Completed	Google Shared Drives		Backup for the drive BE-AutoTests has been deactiva...
Sep 10 2023 02:00 AM	Backup Deleted	Google Shared Drives	Completed	Google Shared Drives		The backup for the drive BE-AutoTests has been mark...
Sep 8 2023 12:00 AM	Backup Deleted	Google Workspace	Completed	Google Workspace		The backup for the mailbox gakashtest@cloudin.co...
Sep 8 2023 12:00 AM	Notification	Google Workspace	Completed	Google Workspace		Backup for the mailbox gakashtest@cloudin.co...

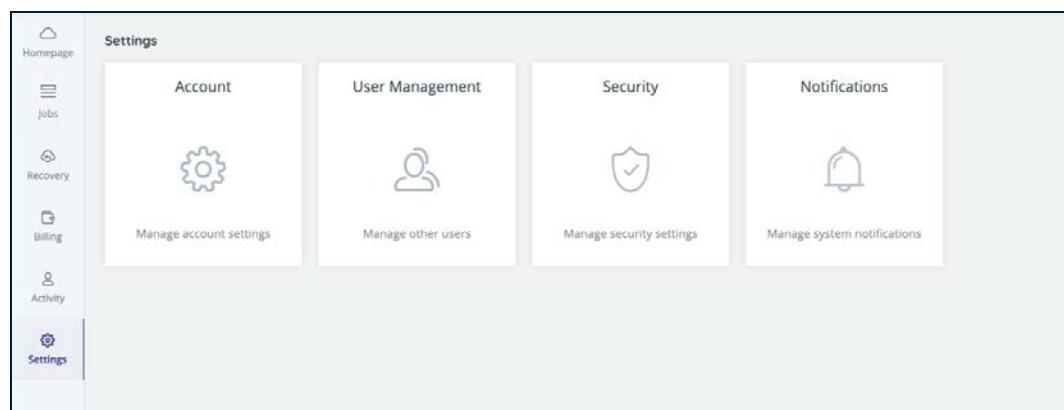
The Security audit table can be exported as a CSV file by clicking **Export**.

7.2 Managing Your Account Settings

The *Settings* page provides you with tools to control both your account and the accounts of users whose external credentials are linked to your account. The *Settings* section consists of the following sub-sections:

- Account
- User Management
- Security
- Notifications

You can find more details on each of the *Settings* pages below.

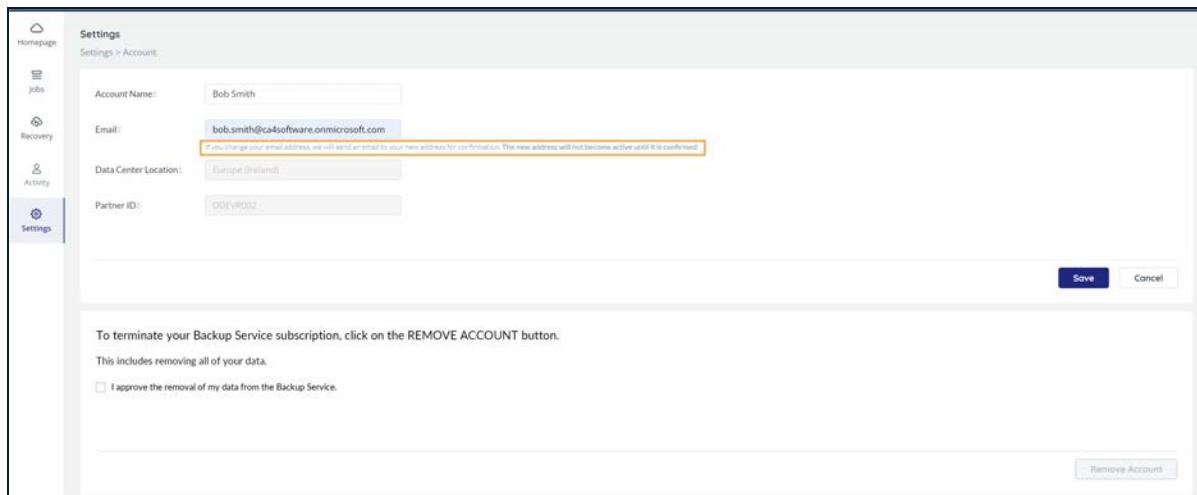


7.2.1 Account Settings

This page allows you to change the name of your account and the email address. You can only change the Data Center Location by contacting support. Finally, this page also allows you to terminate your account.

To update or change your account details:

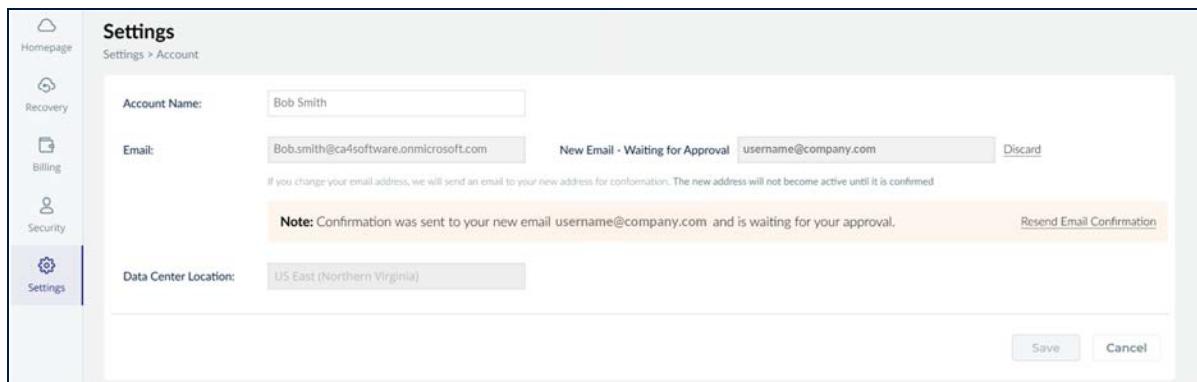
1. From the Navigation Panel, click **Settings** and then click **Account**. The **Settings > Account** page is displayed.



You can update the Account Name and/or Email.

Note: If you change your email address, you will receive an email sent to your new address for confirmation. The new address will not become active until it is confirmed.

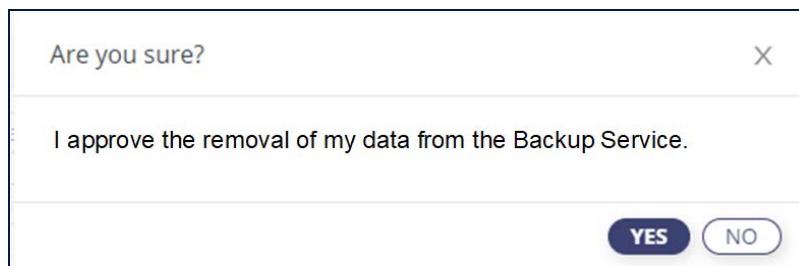
Click **SAVE**. The following screen will appear. If you did not receive the confirmation email, click **Resend Email Confirmation**



7.2.2 Canceling Your Subscription

To cancel your subscription:

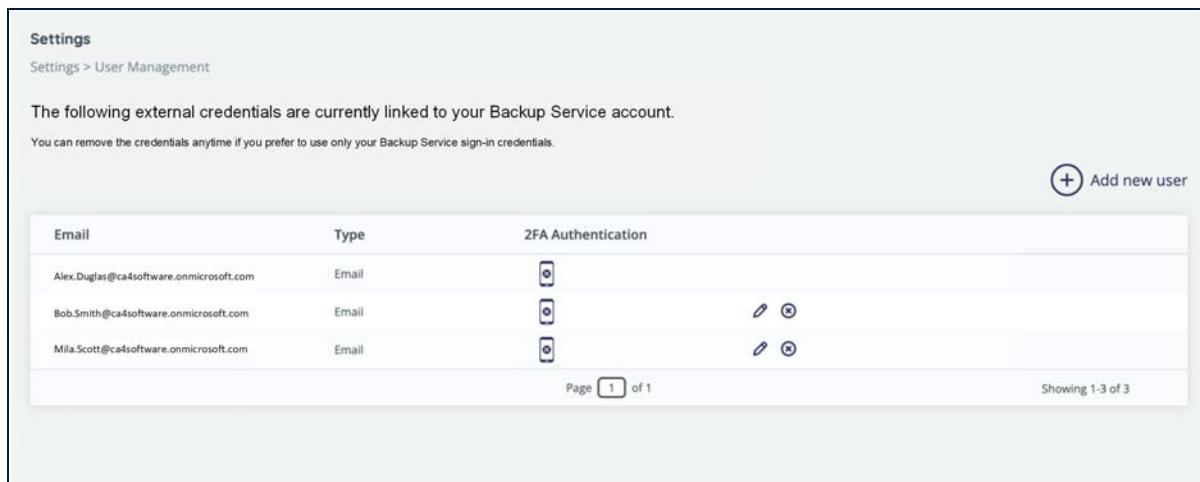
1. Check the box for "I approve the removal of my data from Our backup service" field and click **REMOVE ACCOUNT**.
2. The *Are you sure?* pop-up window is displayed with a confirmation request.
3. Click **YES** to confirm the cancellation.



Note: To prevent mistaken deletions, there is a grace period of 7 days after your account is terminated. After the grace period, if your account is not reactivated, all data from all your backups will be deleted.

7.3 User Management

The page provides tools for fine-level control of the permissions and access levels of your users.



The screenshot shows the 'User Management' section of the Salesforce Settings. It displays a table with three users: Alex.Duglas@ca4software.onmicrosoft.com, Bob.Smith@ca4software.onmicrosoft.com, and Mila.Scott@ca4software.onmicrosoft.com. The table includes columns for Email, Type (Email), and 2FA Authentication. The 2FA column shows icons for each user. A 'Add new user' button is located in the top right corner of the table area. Below the table, there is a page navigation bar showing 'Page 1 of 1' and 'Showing 1-3 of 3'.

Email	Type	2FA Authentication
Alex.Duglas@ca4software.onmicrosoft.com	Email	
Bob.Smith@ca4software.onmicrosoft.com	Email	
Mila.Scott@ca4software.onmicrosoft.com	Email	

Click **+ Add new user** to create a new user and start the configuration procedure for that user, or the pencil icon to edit an existing user's settings. The settings include the operations permitted to the user and the list of available services:

Note: Selecting the role "Administrator" enables permissions to all services and operations.

Settings
Settings > User Management > New user

Email: Bob.Smith@ca4software.onmicrosoft.com Type: Email

Password: Role: Custom

Operations

- General
 - View Account setting page
 - View billing page and manage payment details
 - View support page
 - View account activity
 - Show all your support tickets
 - Manage Notifications
 - View Backups page
- Backup Tasks
 - Activate new backup tasks
 - Modify backup tasks
 - Delete backup tasks
 - Pause backup tasks
 - Execute backup tasks
 - Cancel backup tasks
 - View backups tasks
 - Preview backed up data
 - Restore backups
 - Export backups
 - Delete backup items - GDPR Right to Erasure

Services

- All
 - Microsoft Exchange
 - Microsoft Groups / Teams
 - Microsoft SharePoint
 - Microsoft OneDrive
 - Google Account
 - Salesforce
 - Dropbox
 - Box
 - Google Workspace
 - Google Shared Drives
 - IMAP

Buttons: SAVE Cancel

To save changes, scroll to the bottom of the page and click **SAVE**.

You will be returned to the Settings page. To complete the process, the user must confirm their email address using the link sent via email. This is a security measure, which ensures that the user's email address is valid.

The link is valid for 24 hours. If they did not confirm within this time period, or did not receive the confirmation email, click **Resend Email Confirmation**.

Homepage

Jobs

Recovery

Activity

Settings

Settings
Settings > User Management

The following external credentials are currently linked to your account

You can remove the credentials anytime if you prefer to use only your backup service sign-in credentials.

	Type	2FA Authentication
A confirmation message has been sent to jessica.miller@ca4software.onmicrosoft.com	Email	
Follow the link in the message to confirm the new address.		
jessica.miller@ca4software.onmicrosoft.com	Email	
Sarah.Johnson@ca4software.onmicrosoft.com	Email	

Buttons: Resend Email Confirmation

7.4 Security Settings

The *Security Settings* page enables you to:



- Update your password
- Set up two-factor authentication

You can also enforce certain security policies for your users' accounts.



- With the **Enforce Two-Factor Authentication** option, you can make two-factor authentication mandatory for all the users in your account.
- By setting the **Password Expiration**, you can enable the password expiration option for all your users – you will be also be asked for the number of days before the users' passwords expire.

7.4.1 Changing Your Password for Credential-Based Authorization

You can change your existing account password by performing the following procedure:

1. From the **Settings > Security** page, in the Personal Password Policies panel, click **Change Password**.
2. The *Change password* pop-up is displayed.

Change password

Current Password:

New Password:

Confirm New Password:

SAVE **Cancel**

3. Enter the current password in the *Current Password* field.
4. Enter the new password in the *New Password* field.
5. Re-enter the new password in the *Confirm New Password* field.
6. Click **SAVE**. You can now use this password to access your account.

7.4.2 Two-Factor Authentication

Two-factor authentication provides additional security to your account and your backup data.

To enable two-factor authentication:

1. Click **Activate 2FA**. The Two-Factor Authentication page is displayed.

Settings

Settings >> Security >> Two-Factor Authentication

1. Download the Google Authenticator app.
(for Android, IOS and Blackberry)

2. Open Google Authenticator and add your Backup account by scanning the QR code to the right. If you can't use a QR code then enter this text code: VOLLIK2IWTQ6QMPM

NEXT



2. Download an Authenticator app, depending on your platform.
3. Open the Authenticator app and add your account by scanning the QR code provided in the web application.
4. If you cannot use a QR code, then enter the text code provided in the web application.
5. A six-digit code is generated.
6. Click **NEXT**.
7. Enter the 6-digit code that the application generated.
8. Click **ENABLE** to complete the process of activating the Two-factor authentication.

From now on, every time you sign in to your Account, you are asked to enter a 6-digit code from your authentication app, after you click **SIGN IN**. Click **VERIFY** to verify the code and access the application.

7.4.3 SAML

The Security Assertion Markup Language (SAML) is an open federation standard that allows an identity provider (IdP) to authenticate users and then pass an authentication token to another application known as a service provider (SP).

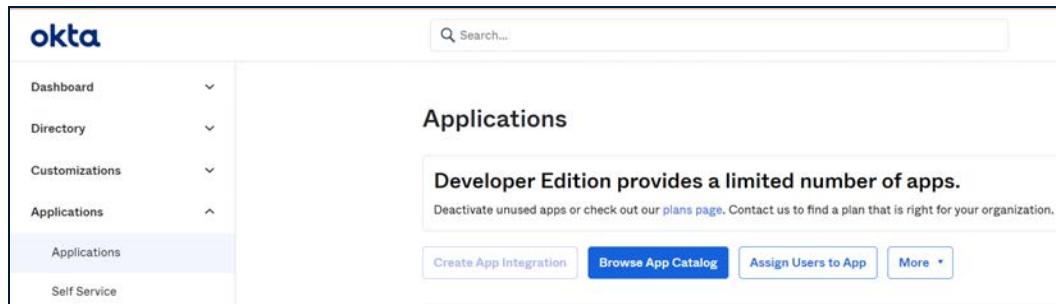
Our backup service supports Okta as its SAML provider.

There are two steps to setting up Okta so that you can use it to log in to our backup service:

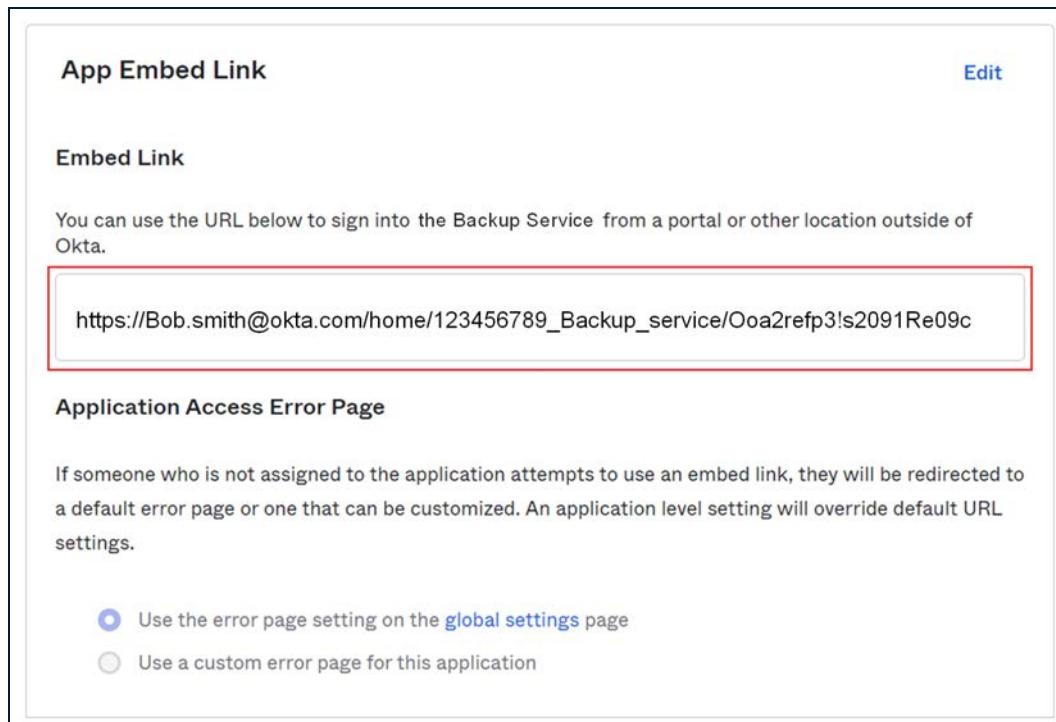
- Setting up our Backup Service in the Okta Application
- Setting up Okta in our backup service application

7.4.3.1 Setting up our Backup Service in the Okta Application

- In the Okta application, click **Applications > Applications > Browse App Catalog**.

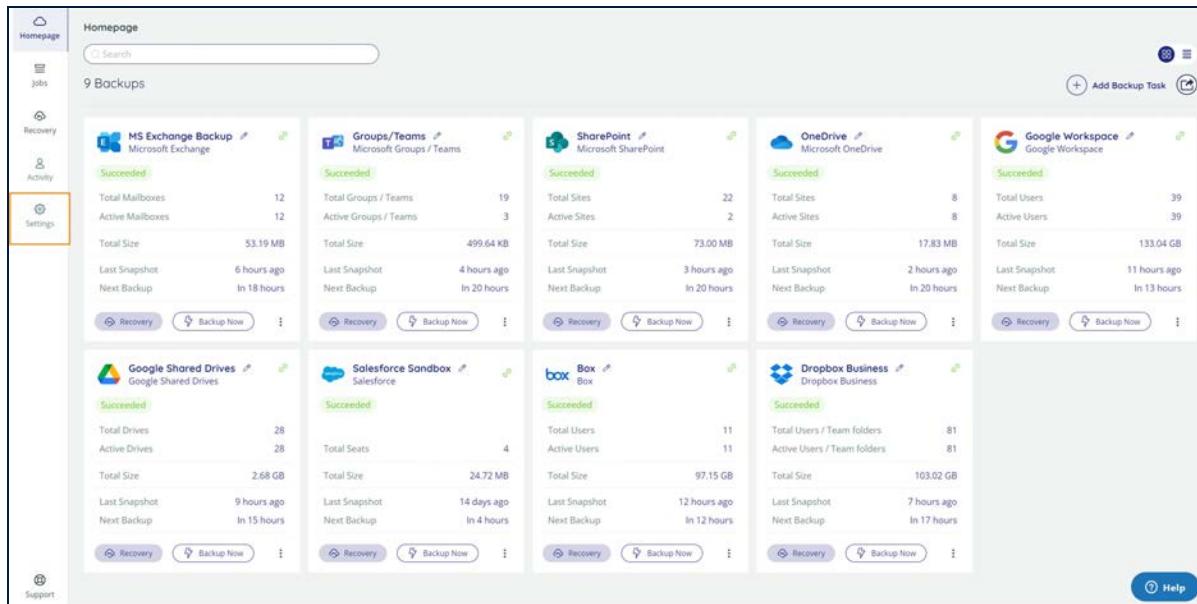


- In the search bar, enter our backup service.
- Click the arrow next to Backup Service SAML, and **Assign to Users** or **Assign to Groups**.
- Click Backup Service SAML, and on the next page, click the **General** tab.
- Scroll down until you see the **App Embed Link** section. Copy the URL that is displayed - you will need this to set up Okta in our backup service app.



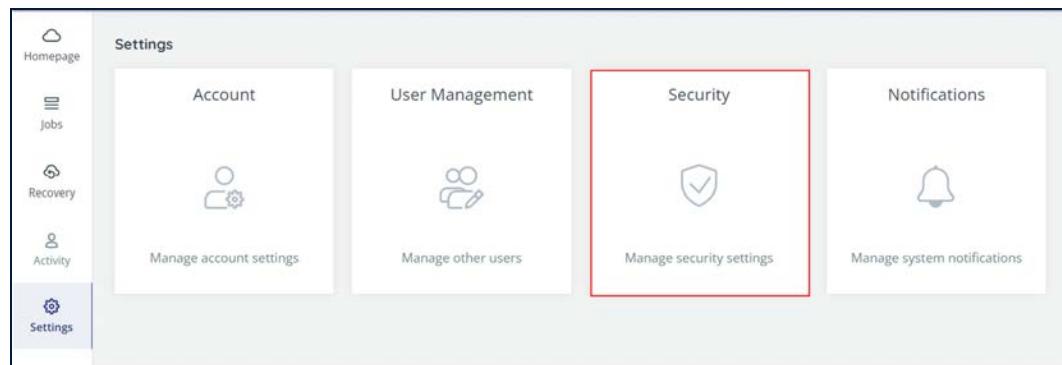
7.4.3.2 Setting Up Okta in our Backup Service Application

1. From the Homepage, click **Settings** in the Navigation panel.



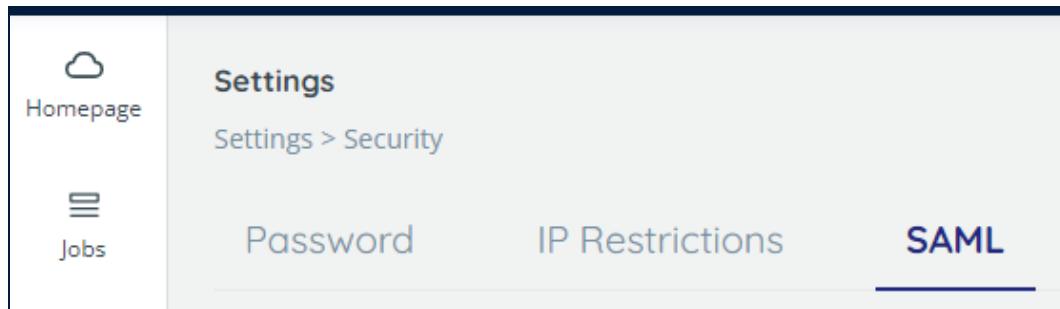
The screenshot shows the Backup Service Application's homepage. The left sidebar has a 'Settings' button highlighted with an orange box. The main area displays various cloud services with their backup status (e.g., Succeeded, Failed) and key metrics like total sites, users, and size. A 'Help' button is visible in the bottom right corner.

2. On the Settings page, click **Security**.



The screenshot shows the Settings page. The 'Security' tab is highlighted with a red box. The page includes sections for Account, User Management, Security (highlighted), and Notifications.

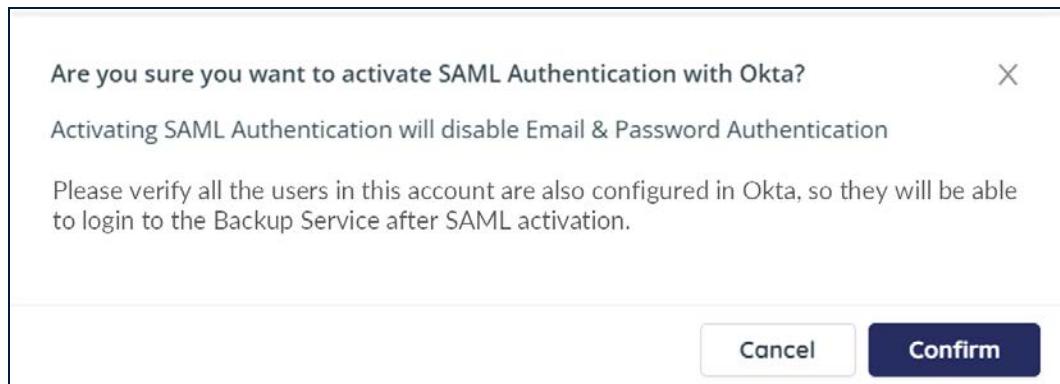
3. Click the **SAML** tab.



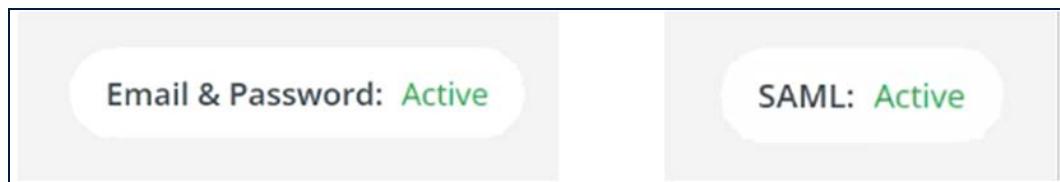
4. Paste the URL that you copied from the Okta site.



5. Click **Activate**.
6. Read the "Are you sure you want to activate SAML Authentication with Okta" message in the next window, and click **Confirm**.



After clicking **Confirm**, the Activate state changes from **Email & Password: Active** to **SAML: Active**.



7.4.4 IP Restrictions

Need fine-grained access control of your endpoints? You can restrict access to the Portal based on the users' IP addresses. This is especially helpful to enforce security policies and prevent unauthorized access by limiting backup/restore requests to company-approved IP addresses, such as an office IP, or a particular VPN.

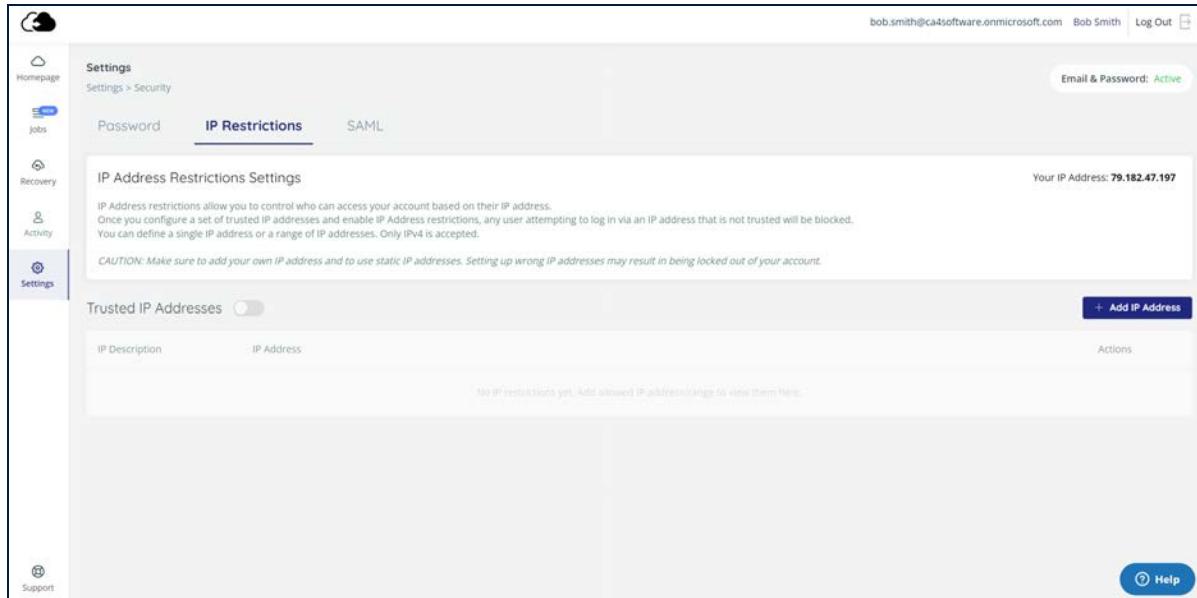
Setting Up IP Restrictions

To enable IP restrictions in your account, first create the list of trusted IP addresses.

IMPORTANT!

It is strongly recommended to use this feature only if you have a static IP address, to prevent users from being locked out.

1. In the **Settings** panel, click **Security**, and then **IP Restrictions**.



2. Click **+ Add IP Address**.

3. Enter one or more IP addresses:

- Enter individual addresses separated by commas, and an optional description.

- Or, enter a one or more ranges of contiguous addresses, and an optional description. Multiple ranges could be used to accommodate VPN and internal networks.

Add New IP Address

Your IP Address: **79.181.255.0**

Enter IP Address description (optional)
Secondary office

You can add one or more IP addresses, or a range of IP addresses:

Trusted IP Address(es)
Separate multiple IP addresses with ",".
79.181.255.0

Trusted IP Address Range
From To
79.181.255.0 - 79.181.255.16

Example 192.168.10.5

Example 192.168.10.0 - 192.168.10.255

Cancel **Save**

4. Once you enter at least one address, the **Trusted IP Addresses** toggle will be turned on. You can always return to disable IP restrictions later on.

Security Settings
Settings > Security

Email & Password: Active

IP Address Restrictions Settings
Your IP Address: 130.248.112.29

IP Address Restrictions allow you to control who can access your account based on their IP address. Once you have configured a set of trusted IP addresses and enabled IP Address restrictions, any user attempting to log in via an IP address that is not trusted will be blocked. You can define a single IP address or a range of IP addresses. Only IPv4 is accepted.

CAUTION: Make sure to add your own IP address and to use static IP addresses. Setting up wrong IP addresses may result in being locked out of your account.

Trusted IP Addresses

+ Add IP Address

IP Description	IP Address	Actions
Office	192.168.10.5, 192.168.10.120, 192.168.40.157, 192.168.60.180	

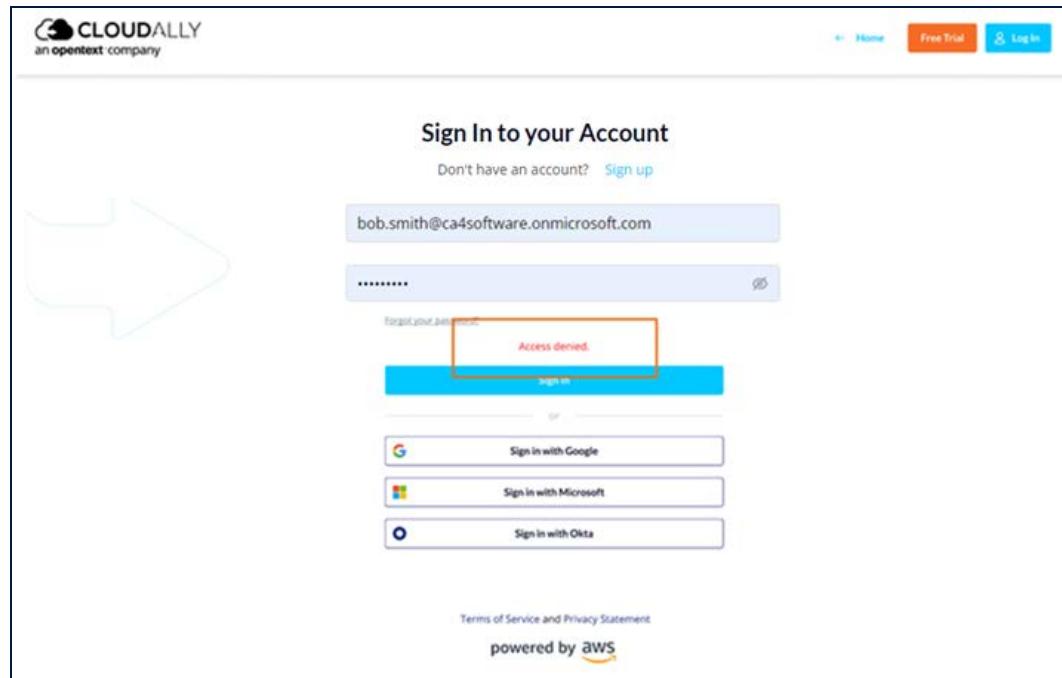
You can edit your list of addresses by clicking the pencil icon, or delete ones that you no longer want on your trusted list by clicking the trash icon.

Note: If you forget to include your own IP address on the trusted list, IP restrictions cannot be enabled.

Your backup service account is now protected from access by users who are not on your list.

Blocking Access

If a user tries to access your backup service account from an untrusted IP address, the following "access denied" error message will appear:



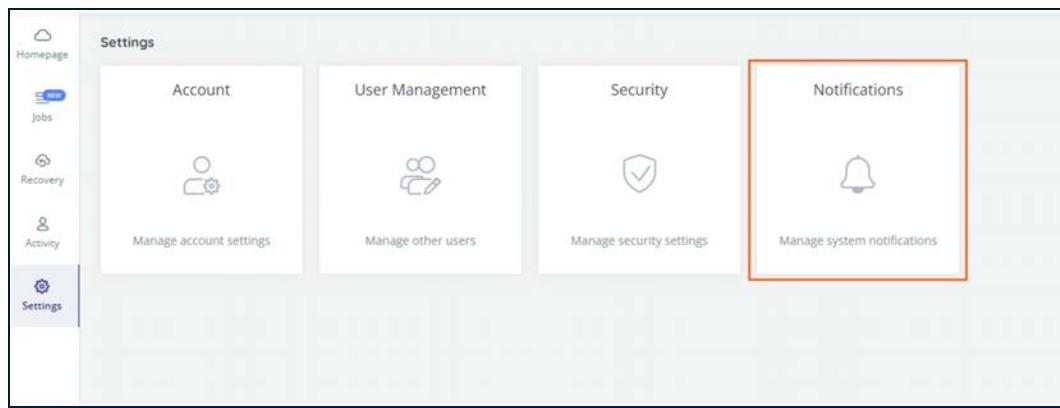
7.4.5 Email Notifications

Whenever you enable or disable IP restrictions, or modify the addresses, our backup service will send you an email notification, letting you know what has changed.

7.5 Notifications Settings

This menu option enables you to manage your system notifications.

From the Navigation Panel, click **Settings > Notifications**.



The following screen will appear:

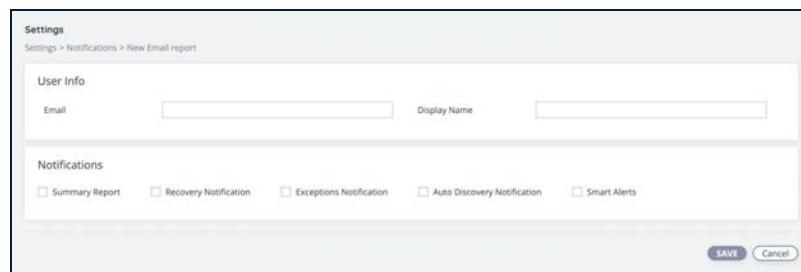
A screenshot of the 'Settings > Notifications' configuration page. It includes sections for 'Summary Report' (disabled), 'Report Format' (Backup tasks overview selected), 'Report Frequency' (Once A Day), 'Provide as' (Download Link selected), and a checkbox for 'Send the report only in case of backup failure'. Below this is a 'Send Notifications To:' table. The table has columns: Email, Display Name, Summary Report, Recovery Notification, Exceptions Notification, Auto Discovery Notification, Smart Alerts, and Action. One row is shown for 'Bob.smith@CA4Software.onmicrosoft.com' with 'Bob Smith' as the display name. The 'Summary Report' and 'Recovery Notification' checkboxes are checked. The 'Action' column shows a 'Edit' icon and a 'Delete' icon. The table footer shows 'Page 1 of 1' and 'Showing 1-1 of 1'.

The top of the screen enables you to configure the following options:

- Report Format: Backup tasks overview vs. backup failure details
- CSV Attachment vs. Download Link
- Report Frequency: daily, weekly or monthly
- Send the report only in case of backup failure

To set up a new recipient:

1. Click **+ Add new recipient**.
2. Enter the Email of the recipient and the Display name. The Display name is used in the report email to address the recipient.
3. Select the desired notification types:
 - a. Summary Report
 - b. Recovery Notification
 - c. Exceptions Notification
 - d. Auto Discovery Notification
 - e. Smart Alerts
4. Click **SAVE** to create the new recipient.



The screenshot shows a configuration screen for a new email report. At the top, it says 'Settings > Notifications > New Email report'. The 'User Info' section contains fields for 'Email' and 'Display Name'. The 'Notifications' section contains five checkboxes: 'Summary Report', 'Recovery Notification', 'Exceptions Notification', 'Auto Discovery Notification', and 'Smart Alerts'. At the bottom right are 'SAVE' and 'Cancel' buttons.

8 Managing Subscriptions and Payments

8.1 Subscribing to Our Backup Service

Once the trial period has ended, you need to subscribe to our backup service to access and manage your backups, otherwise your backed up data will be deleted.

To subscribe to a plan:

1. Click the **Subscribe** link displayed in your account. Alternatively, you can click the **Billing** option of the Navigation Panel.

The *Review Billing* page is displayed with the option to select either **MONTHLY** or **ANNUAL** billing options.

Note: You can subscribe before the end of the trial period, and the payment period will start after the trial period is over.

2. Click **MONTHLY** or **ANNUAL**, depending on your preference.

You are redirected to the *Payment Details* page. Fill in the billing and credit card details to finish the subscription process. Refer to [Payment Details](#) for more information.

8.1.1 Monthly Subscriptions

When you subscribe to a monthly plan, the credit card that you registered in the *Billing > Payment Details* page will be charged the amount that you owe.

Our backup service's billing is handled by a PCI-compliant payment processor.

To finalize your subscription, enter your credit card details and general billing information, and then click **Subscribe**.

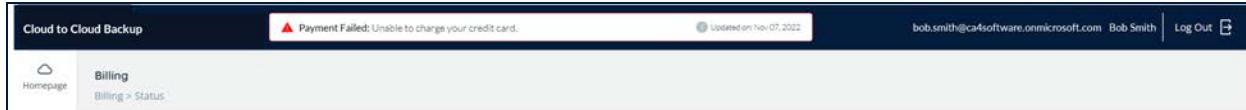
The initial payment will be charged at the end of your 2-week trial period.

A receipt will be emailed to you each month after you are charged.

If our backup service is unable to charge your credit card (e.g., because it has expired), you will be notified by email. Additionally, a message will appear in the

application that you need to go to the *Billing Status* page so you can review your billing details, and then update your credit card information if necessary.

Note: The billing status is usually updated within a few minutes after the payment is complete. If the status has not updated after 24 hours, please contact our backup service support.



Note: The monthly payments are processed automatically once you provide the required information in the Payment Details section, and it has been verified that your credit card is valid. To disable automatic payment processing, please contact support. Instead, you will start receiving monthly invoices for the payments.

8.1.2 Annual Subscriptions

When you subscribe to an annual plan, you will receive a confirmation message that your request has been submitted, and then support will send you an email, asking that you confirm your annual subscription request.

Once you have confirmed, our backup service will email an invoice to you, payable in 30 days by credit card, PayPal, or bank transfer.

After the initial payment, our backup service will send you an invoice 30 days before your payment is due, in 11 months. You will also be reminded that your annual subscription is due online:

Note: The billing status is usually updated within a few minutes after the payment is complete. If the status has not updated after 24 hours, please contact our backup service support.

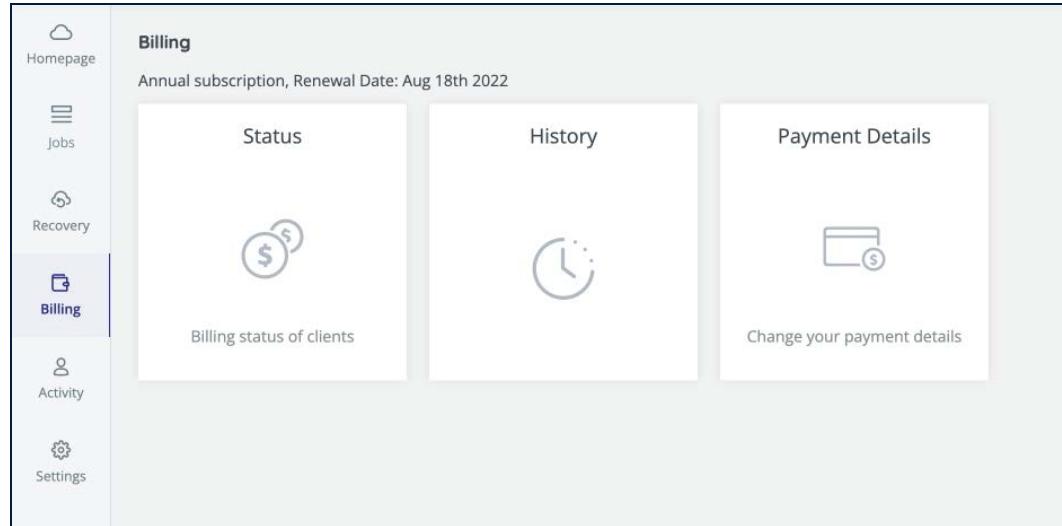


Should you fail to make your annual payment, you will be reminded with a message like this:



After you finalize your subscription, the *Billing > Payment Details* page displays additional billing management options and provides a brief summary of the payment information for the current period and the next payment date.

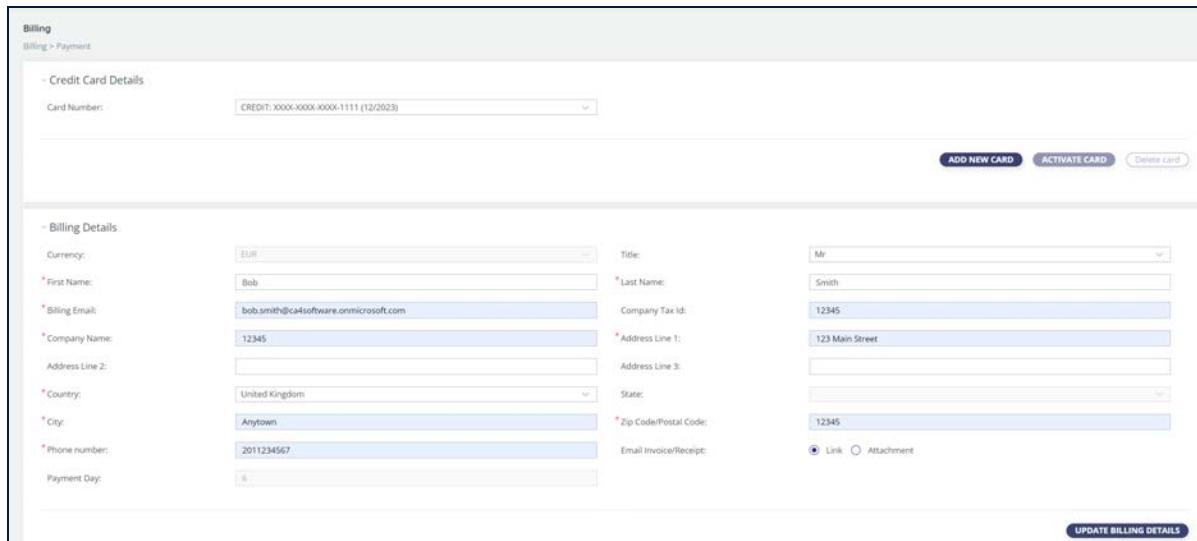
8.2 Payment Details



The *Payment Details* page contains the information used for billing.

8.2.1 Monthly Subscriptions

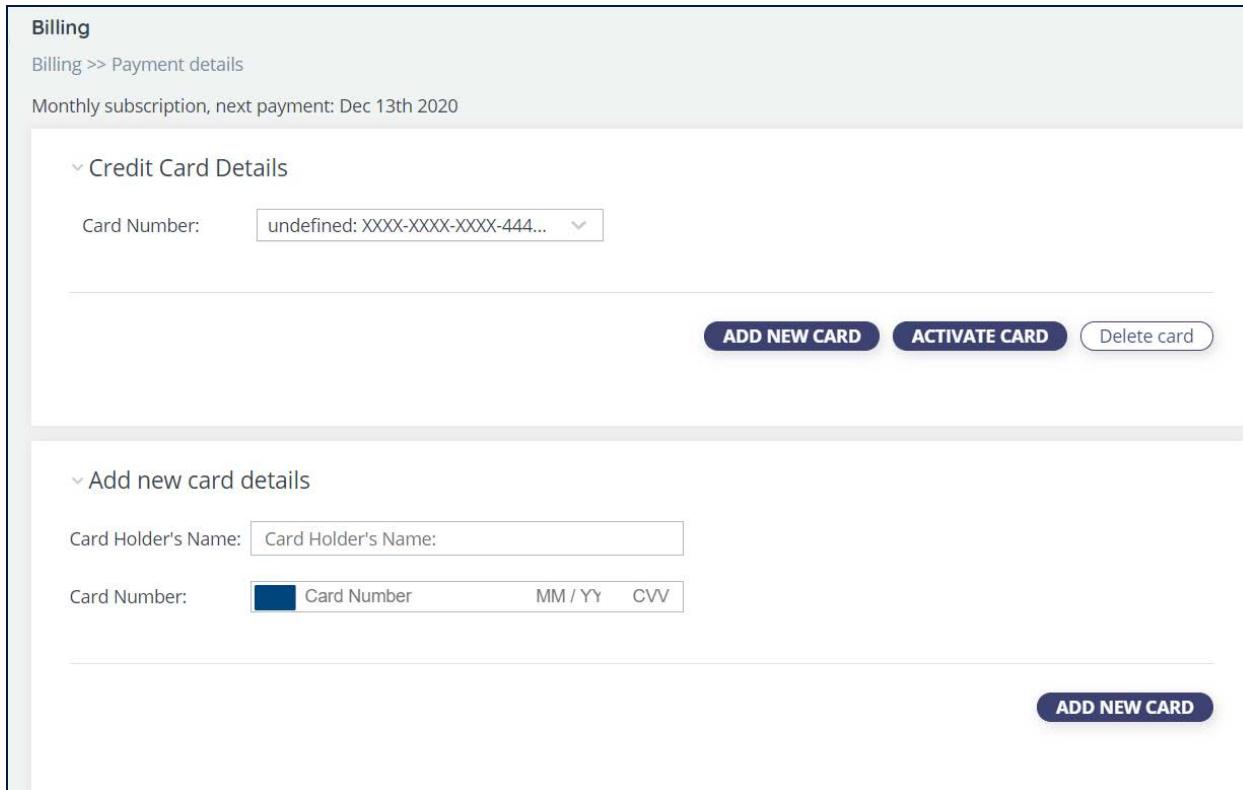
If you have chosen a monthly payment plan, you can update your credit card and billing details here:



The screenshot shows the 'Billing > Payment' page. At the top, there is a 'Credit Card Details' section with a card number input field containing 'CREDIT: XXXXX-XXXX-XXXX-1111 (12/2023)'. Below this is a 'Billing Details' section with various fields: Currency (EUR), First Name (Bob), Last Name (Smith), Company Tax Id (12345), Address Line 1 (123 Main Street), Address Line 2 (Address Line 2 is empty), State (United Kingdom), Zip Code/Postal Code (12345), and Email Invoice/Receipt (bob.smith@ca4software.onmicrosoft.com). There are also fields for City (Anytown), Phone number (2011234567), and Payment Day (8). At the bottom right are buttons for 'ADD NEW CARD', 'ACTIVATE CARD', and 'Delete card', and a link to 'UPDATE BILLING DETAILS'.

8.2.1.1 Add New Card

The **ADD NEW CARD** option enables you to define your card information for a monthly subscription payment.



The screenshot shows the 'Billing > Payment' page with the 'Add New Card' section expanded. It includes a 'Credit Card Details' section with a card number input field showing 'undefined: XXXX-XXXX-XXXX-444...'. Below this is an 'Add new card details' section with a 'Card Holder's Name' input field and a 'Card Number' input field divided into 'Card Number' (with a redacted card number), 'MM / YY', and 'CVV' fields. At the bottom right of this section is a large 'ADD NEW CARD' button.

To create a new payment method:

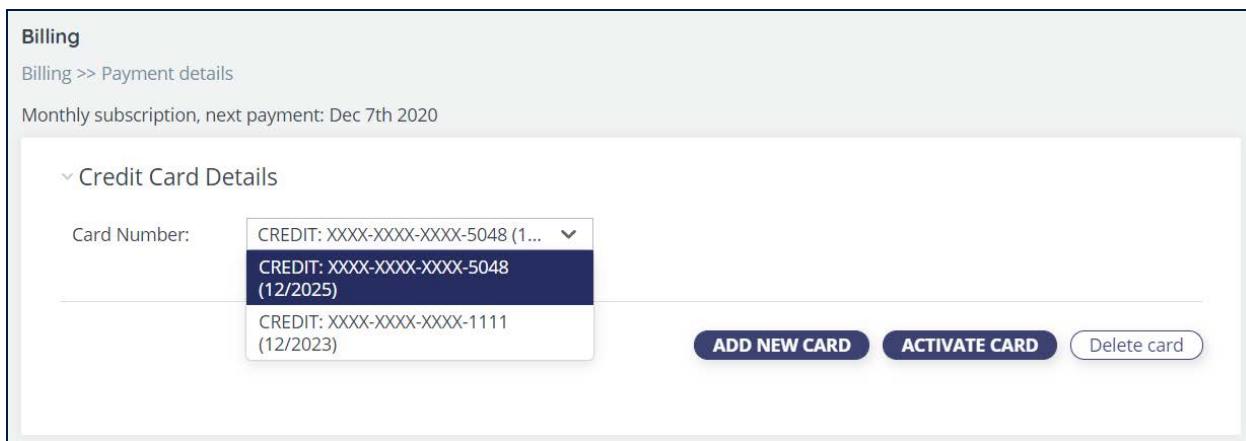
1. Click **ADD NEW CARD**.
2. Enter the card details such as Card Number, CVV, Card holder's name, and card expiry date.
3. Click **ADD NEW CARD**.

The new card information is saved and activated, and you can use this card.

8.2.1.2 Change Payment Method

To change your existing payment method:

1. Click the drop-down list and select the payment method from the Cards Number drop-down list.
2. Click the payment method from the list (the screen shot below depicts choosing a different credit card).
3. Click **ACTIVATE CARD** to set the selected card as the preferred payment method.



The details section displays billing information such as Currency, Title, Name, and Billing email.

4. Below, there are more fields in the Billing details section. The Company Tax ID field indicates your company tax ID. (This is mandatory for Israeli companies.)

Note: Due to Value-added tax (VAT), Israeli companies must include their Tax ID. Therefore, the Company Tax ID field is mandatory for Israel, and if this field is not completed, our company will not be able to provide you with backup services.

▼ Billing Details

* Currency:	USD	Title:	<input type="text"/>
* First Name:	<input type="text"/>	* Last Name:	<input type="text"/>
* Billing Email:	<input type="text"/>	Company Tax Id:	<input type="text"/>
* Company Name:	<input type="text"/>	* Address Line 1:	<input type="text"/>
Address Line 2:	<input type="text"/>	Address Line 3:	<input type="text"/>
* Country:	<input type="text"/>	State:	<input type="text"/>
* City:	<input type="text"/>	* Zip Code/Postal Code:	<input type="text"/>
* Phone number:	<input type="text"/>	Email Invoice/Receipt:	<input type="radio"/> Link <input checked="" type="radio"/> Attachment

UPDATE BILLING DETAILS

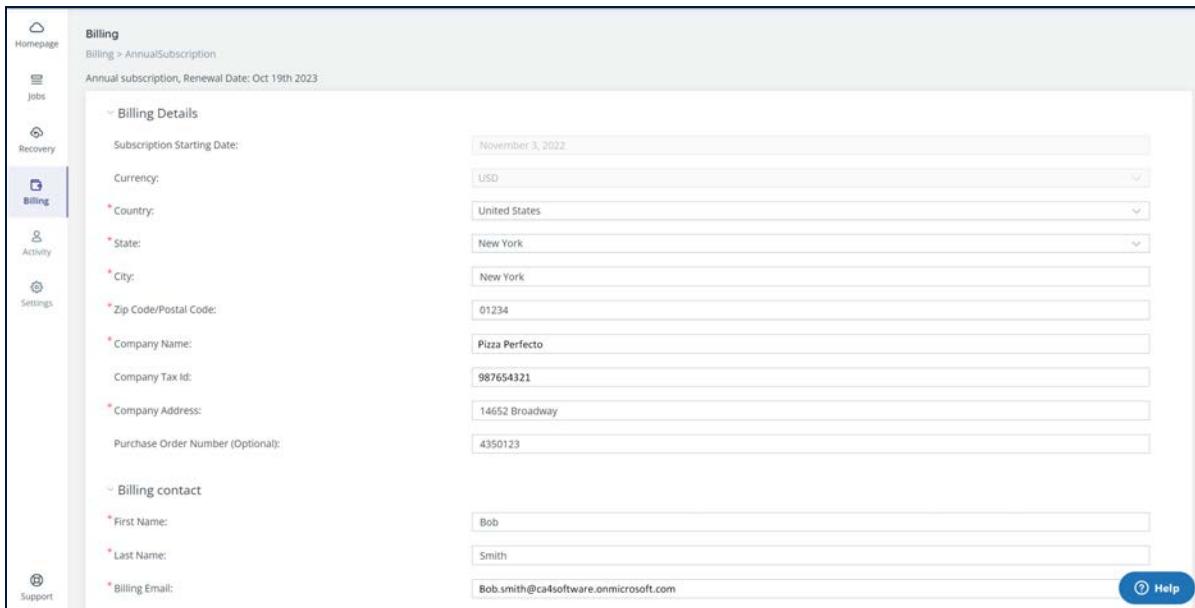
5. Update the required fields. The fields marked with the * symbol are mandatory.
6. Click **UPDATE BILLING DETAILS**.
7. The updates are saved.

You can choose whether you want to receive the Invoices or Receipts as a link or as an attachment to the email.

Note: You can change the billing currency by contacting support.

8.2.2 Annual Subscriptions

If you have chosen an annual payment plan, you can update your billing details here. When you are done, click **SAVE**.



Billing
Billing > AnnualSubscription
Annual subscription, Renewal Date: Oct 19th 2023

Subscription Starting Date: November 3, 2022

Currency: USD

*Country: United States

*State: New York

*City: New York

*Zip Code/Postal Code: 01234

*Company Name: Pizza Perfecto

Company Tax Id: 987654321

*Company Address: 14652 Broadway

Purchase Order Number (Optional): 4350123

*First Name: Bob

*Last Name: Smith

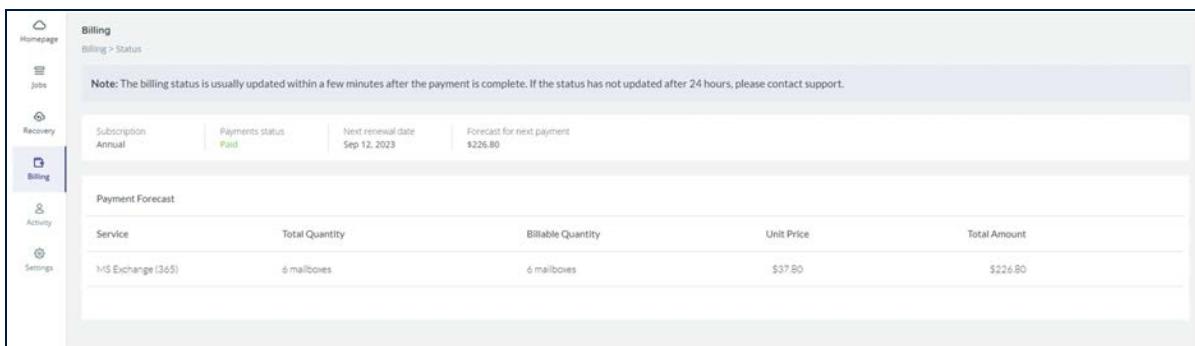
*Billing Email: Bob.smith@ca4software.onmicrosoft.com

Help

8.3 Billing Status

Annual Subscription

When you have paid your annual subscription, this page displays the next payment forecast for the upcoming payment date. The details include Service type and backup name, Quantity, Unit Price, and the Total Amount.



Billing
Billing > Status

Note: The billing status is usually updated within a few minutes after the payment is complete. If the status has not updated after 24 hours, please contact support.

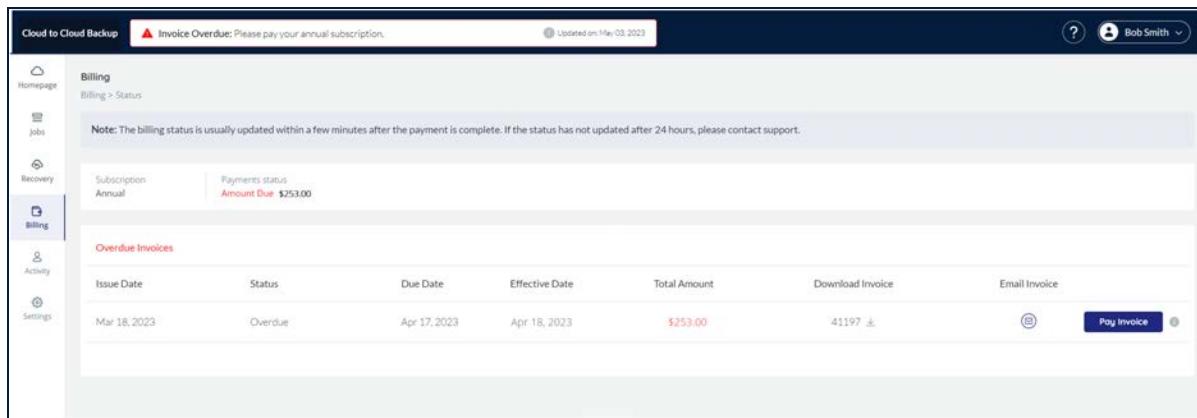
Subscription	Payments status	Next renewal date	Forecast for next payment
Annual	Paid	Sep 12, 2023	\$226.80

Payment Forecast

Service	Total Quantity	Billable Quantity	Unit Price	Total Amount
MS Exchange (365)	6 mailboxes	6 mailboxes	\$37.80	\$226.80

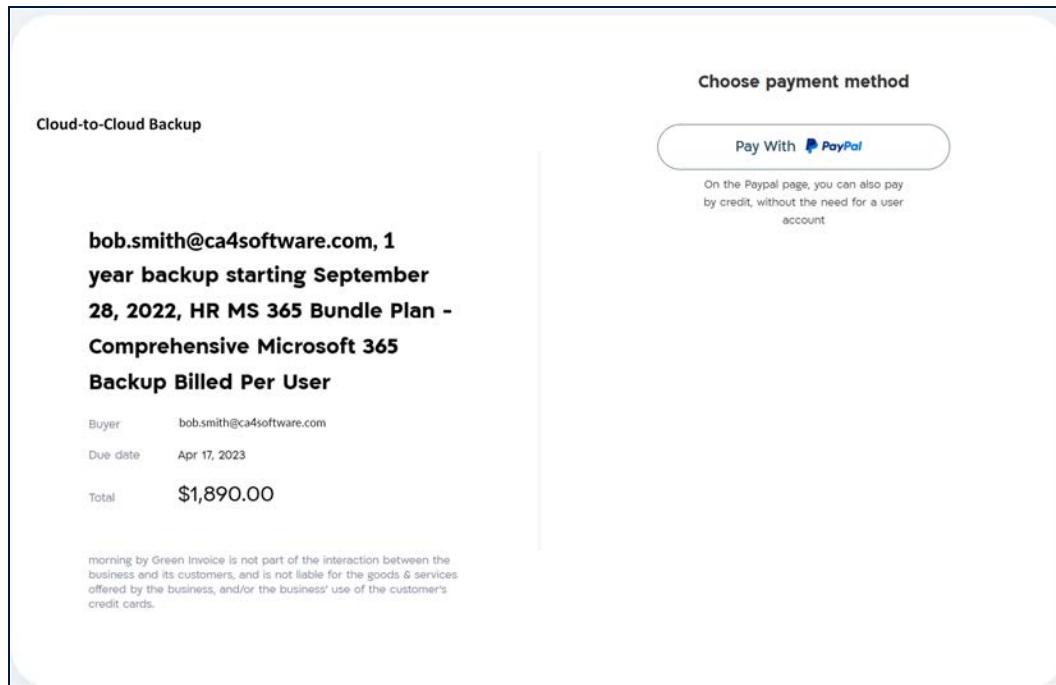
When your subscription amount becomes due, the Billing Status page displays the following information:

- **Issue date** - the date the invoice was issued
- **Status** - Paid, Due or Overdue
- **Due Date** - the date by which the invoice must be paid.
- **Effective Date** - the date the subscription period begins.
- **Total Amount** - amount owed.
- **Download Invoice** - Click this to download a PDF copy of your invoice.
- **Email Invoice** - Click this to send an invoice to your email address.
- **Pay Invoice** - Click this to directly pay the amount owed online.



The screenshot shows the Salesforce Billing Status page. The top navigation bar includes 'Cloud to Cloud Backup' and a red warning message: 'Invoice Overdue: Please pay your annual subscription.' The top right shows 'Updated on May 03, 2023' and a user profile for 'Bob Smith'. The left sidebar has tabs for 'Homepage', 'Jobs', 'Recovery', and 'Billing' (which is selected). The main content area has a note: 'Note: The billing status is usually updated within a few minutes after the payment is complete. If the status has not updated after 24 hours, please contact support.' Below this, a table shows 'Subscription' (Annual) and 'Payments status' (Amount Due: \$253.00). A section for 'Overdue Invoices' lists one entry: 'Issue Date' (Mar 18, 2023), 'Status' (Overdue), 'Due Date' (Apr 17, 2023), 'Effective Date' (Apr 18, 2023), 'Total Amount' (\$253.00), 'Download Invoice' (link), 'Email Invoice' (link), and a 'Pay Invoice' button.

You can click **Pay Invoice**, and you will be directed to the following screen, where you can pay your invoice via PayPal or by credit card:



Monthly

Similarly, if there was a problem with your monthly subscription payment, the status will look as follows:

From here, click **Update credit card details** and provide the new information.

8.4 History

This page displays the history of payments.

Billing			
Billing >> History			
Monthly subscription, next payment: Dec 13th 2020			
Reference Number	Issue Date	Due Date	Amount
68277	November 13, 2020	November 13, 2020	\$143.45
67599	October 13, 2020	October 13, 2020	\$44.65
67134	September 13, 2020	September 13, 2020	\$49.40
66837	August 13, 2020	August 15, 2020	\$44.65

By clicking on the reference number, you can download the receipt, which provides details about the number of backed-up accounts or the amount of stored data, and the total amount paid. It also displays the payment method used.

An example of a receipt is displayed below.

To: pizza-perfecto.com – PPV001	Backup Service, Inc.		
Pizza Perfecto Ltd 18 Mozarella Lane United Kingdom ID 307 123 08	Tax ID: 5145966667 123 Commerce Lane Anytown, USA 12345 www.backupservice.com		
Invoice / Receipt 51646			
26 April 2023			
Certified Copy			
Invoice / Receipt for admin@pizza-perfecto.com, 1 year backup starting April 22, 2021, GBP			
QTY	Description	Price	Total
70	Dropbox 696.56 GB	16.25 GBP	1,137.50 GBP
		Subtotal	1,137.50 GBP
		VAT 0%	0.00 GBP
		Total payable	1,137.50 GBP
Payments Details			
Type	Description	Date	Amount
PayPal	Account 12345678 / Transaction # 987654321	26 April 2021	1,137.50 GBP
			Total 1,137,50 GBP
	Invoice / Receipt for Proforma Invoice 11392 Paid with PayPal Merchant Account: KQMTW2PHR5CUG		
Signature: 			
Secured Electronic Signature			
Digital Document Signed by Green Invoice #			
Created 26/04/2021 16:29 Invoice / Receipt 51646 page 1 of 1			

8.5 Billing Notification Messages

Administrators can define whether individual users will see the Billing Notification Messages on their screens (e.g., Payment Due, Payment Overdue, Payment Failed).

To turn notifications on or off:

1. From the Navigation Panel, click **Settings > User Management**.
2. For an existing user, click the pencil icon next to the user's name.
For a new user, the notification options will appear when you define the new user's details.
3. Click **View billing notification messages** on or off.

