

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

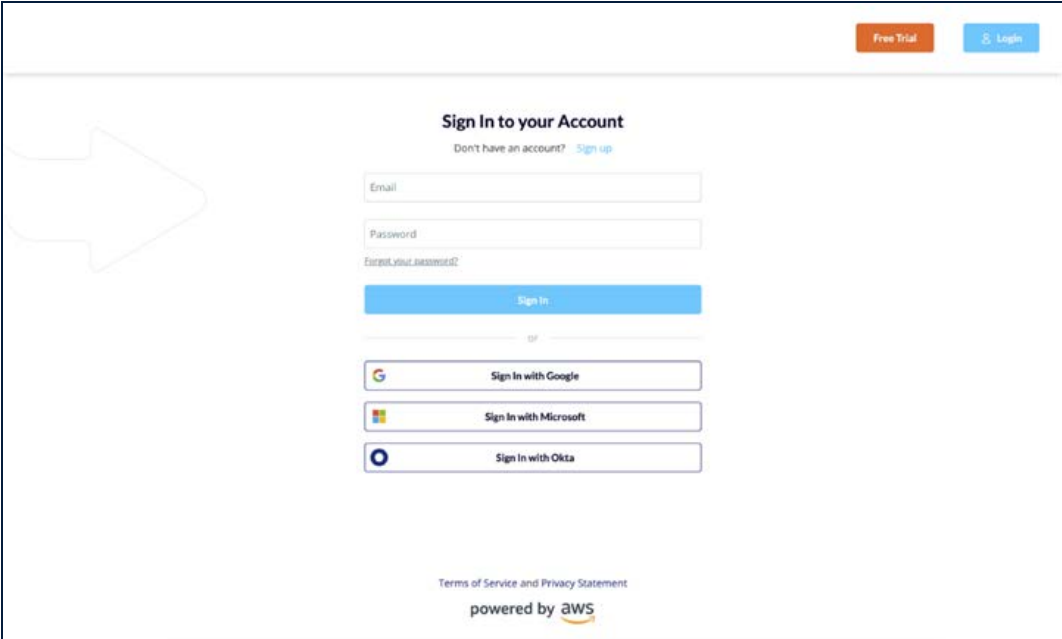
2.1 Prerequisites

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.

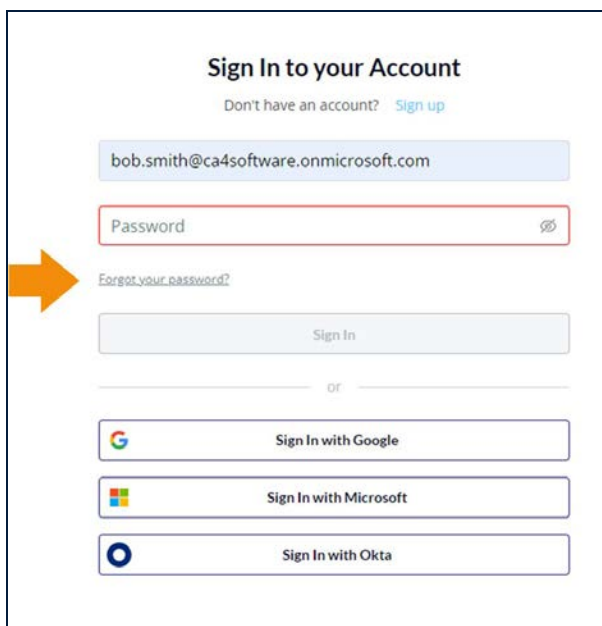
5. Your trial account is created, and an email containing your activation link is sent to your email address. Click on the activation link contained in the email you received to activate your account. If you sign up with Google, Azure, or Okta, the activation link will not be sent to you.
6. Once your 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

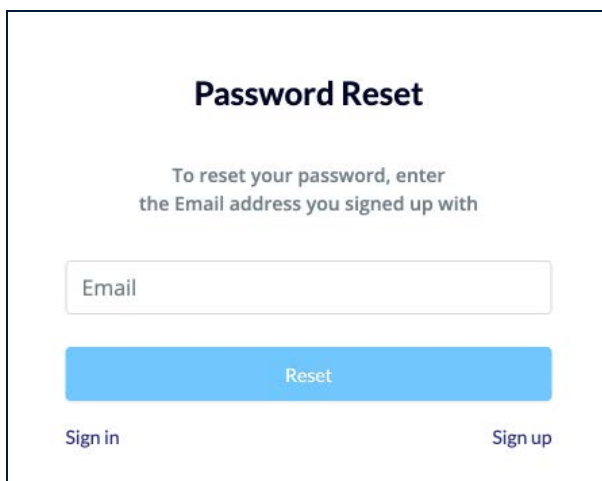
If you do not remember your password, you can easily reset it using the **Password Reset** function.

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



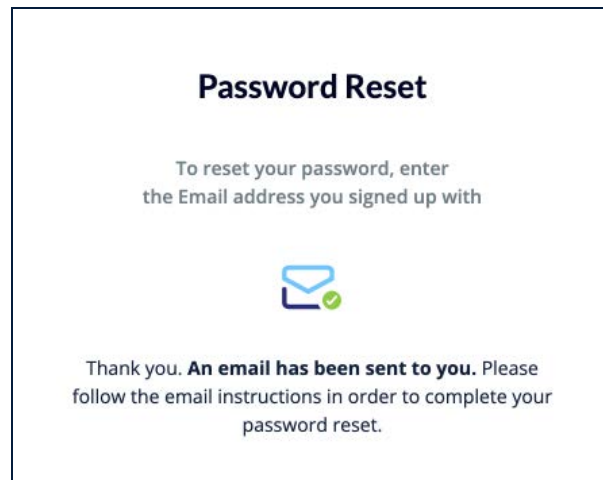
The screenshot shows the 'Sign In to your Account' page. At the top, it says 'Sign In to your Account' with a link 'Don't have an account? Sign up'. Below this is a text input field containing 'bob.smith@ca4software.onmicrosoft.com'. Underneath is a password input field labeled 'Password'. To the left of the password field, an orange arrow points to a link labeled 'Forgot your password?'. Below the password field is a 'Sign In' button. Further down, there are three social login options: 'Sign In with Google', 'Sign In with Microsoft', and 'Sign In with Okta', each with its respective logo.

2. The *Password Reset* page will appear.



The screenshot shows the 'Password Reset' page. It has the heading 'Password Reset' and the instruction 'To reset your password, enter the Email address you signed up with'. Below this is an 'Email' input field. Underneath the input field is a blue 'Reset' button. At the bottom of the page, there are two links: 'Sign in' on the left and 'Sign up' on the right.

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.

A screenshot of a 'Change Your Password' window. The title 'Change Your Password' is centered at the top. Below it, the instruction 'Fill-in the new password' is centered. There are two input fields: 'New Password' and 'Confirm New Password', each with a password strength icon on the right. Below the fields is a blue 'Save' button and a 'Cancel' link.

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

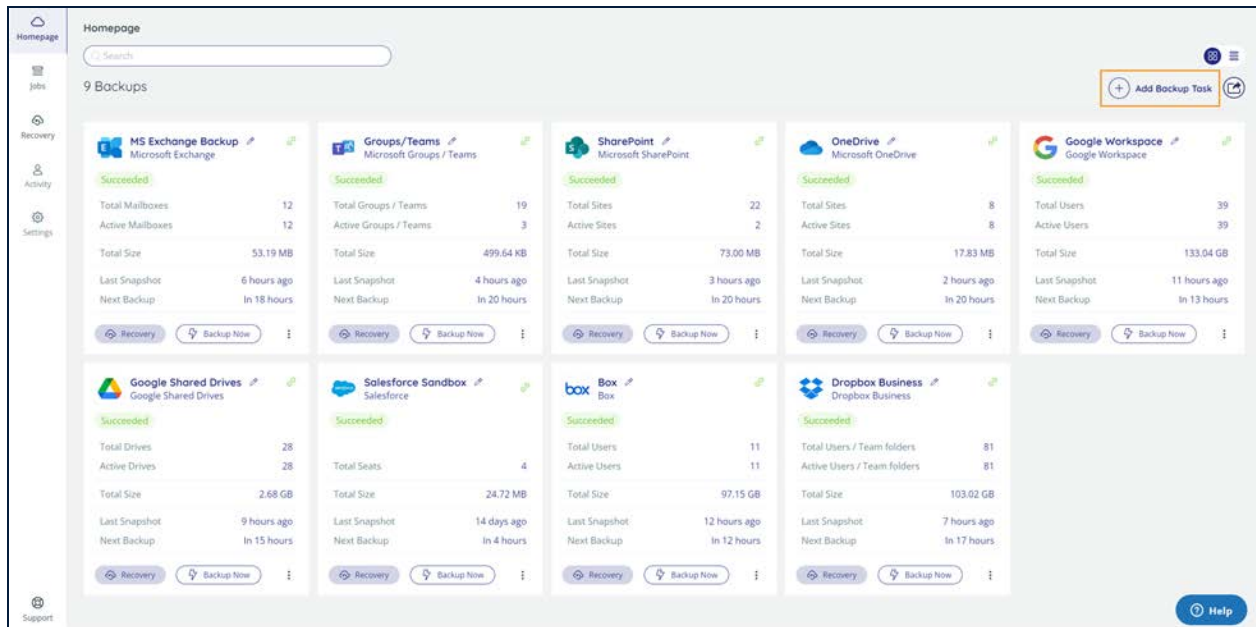
Before our backup service can access your Salesforce account, you need to enable API access in your Salesforce user profile:

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.

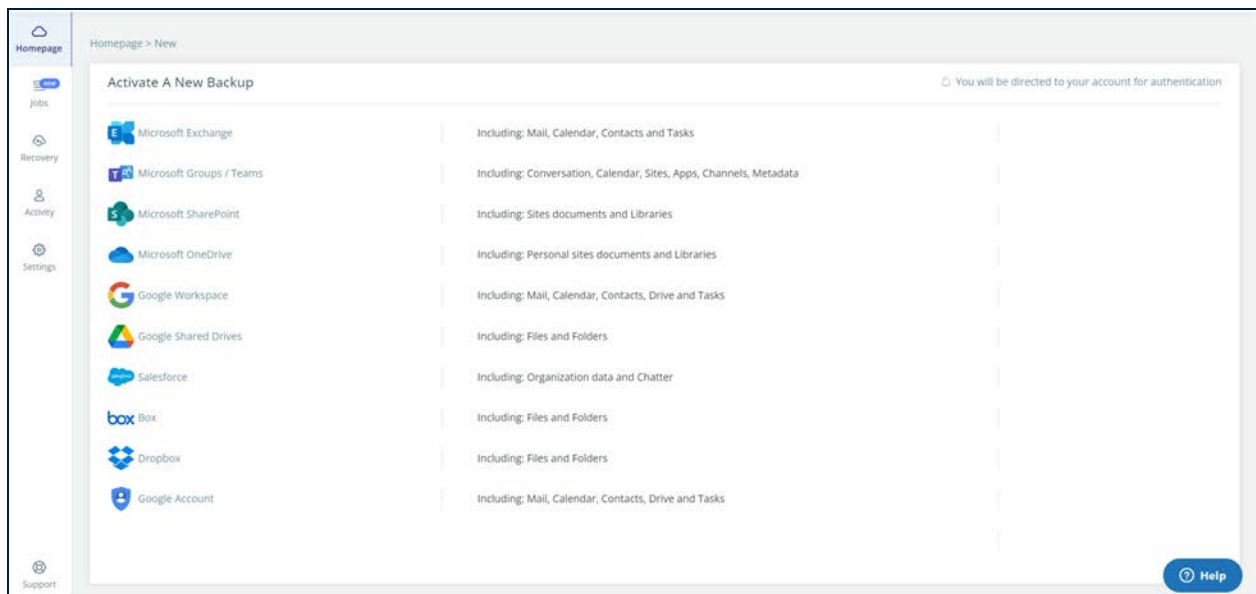
To create a new backup task:

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

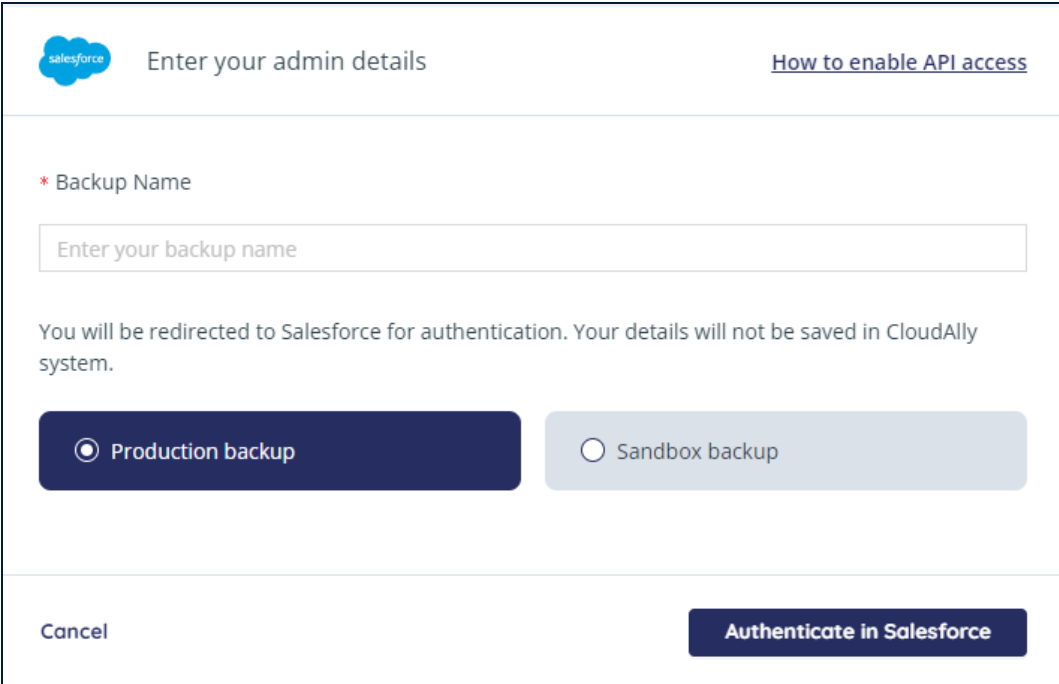
2. On the Homepage, click + Add Backup Task.



The *Activate A New Backup* page is displayed:

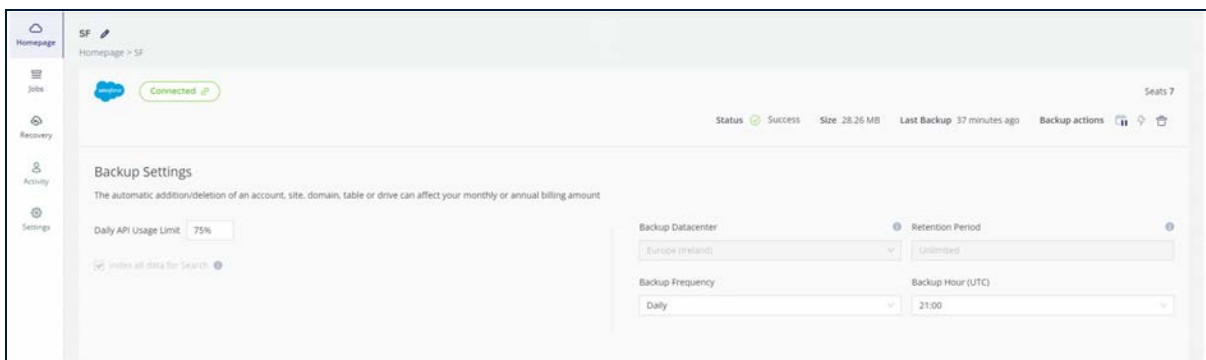


3. Click **Salesforce**. The following screen appears.



The screenshot shows a form titled "Enter your admin details" with the Salesforce logo. A link "How to enable API access" is in the top right. The form includes a required field for "Backup Name" with a placeholder "Enter your backup name". Below this, a message states: "You will be redirected to Salesforce for authentication. Your details will not be saved in CloudAlly system." There are two radio button options: "Production backup" (selected) and "Sandbox backup". At the bottom, there are "Cancel" and "Authenticate in Salesforce" buttons.

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.

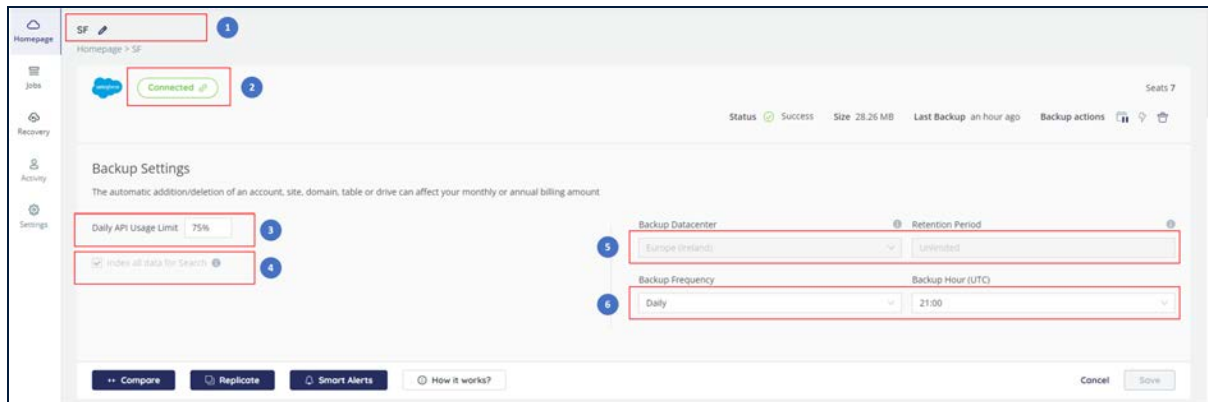


The screenshot shows the "Backup Settings" page. The left sidebar has links for "Homepage", "Jobs", "Recovery", "Activity", and "Settings". The main content area shows a "Connected" status with the Salesforce logo. Below this, the "Backup Settings" section includes a note: "The automatic addition/deletion of an account, site, domain, table or drive can affect your monthly or annual billing amount." There are two settings: "Daily API Usage Limit" set to "75%" and a checkbox for "Index all data for search" which is checked. On the right, there are two sections: "Backup Datacenter" with a dropdown menu showing "Europe (Ireland)" and "Retention Period" with a dropdown menu showing "Unlimited". Below these, "Backup Frequency" is set to "Daily" and "Backup Hour (UTC)" is set to "21:00". At the top right, there is a "Seats 7" indicator. The status bar at the top shows "Status: Success", "Size: 28.26 MB", "Last Backup: 37 minutes ago", and "Backup actions".

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.

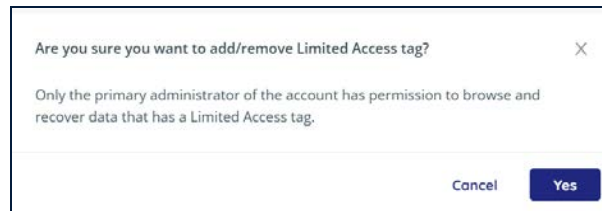
3.2.1 Compare, Replicate, and Smart Alert Buttons

- 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."](#)

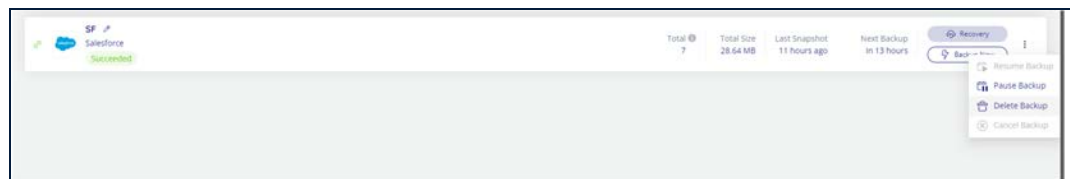


3.3 Removing a Backup

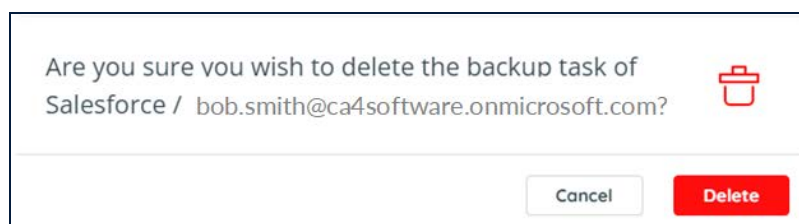
You can delete individual user backups or the entire backup service from your account if you do not want to use them further. The following sections guide you through the process of removing backup services and individual user backups.

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.



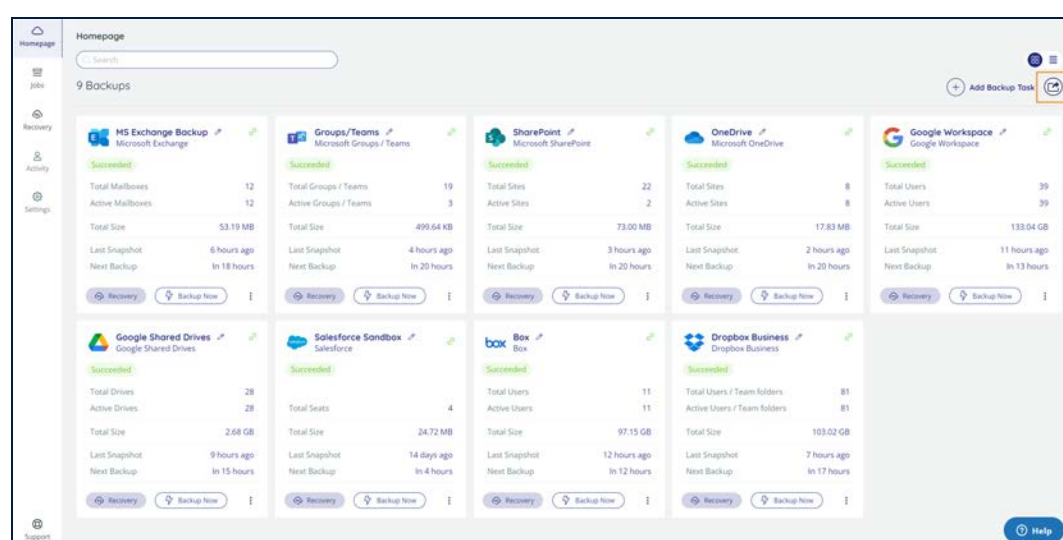
Click **Delete**. The selected backup service is removed from your account.

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).

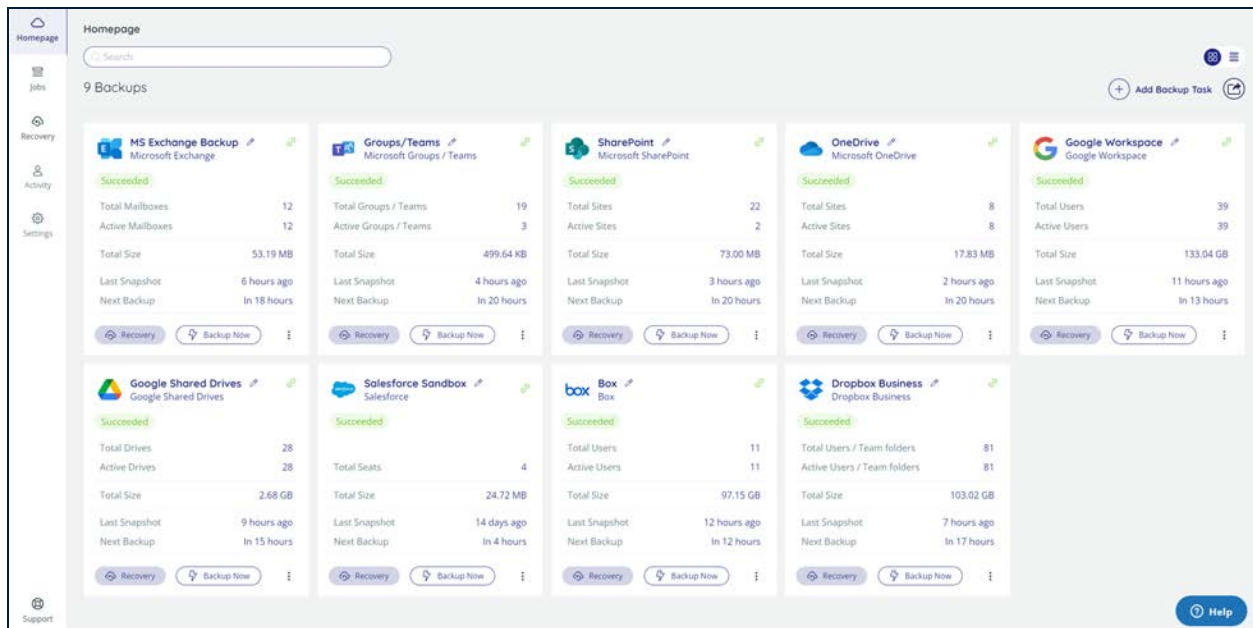
To export a usage report, click the **Export** button, next to **Add Backup Task**. The report will be sent to you via email.



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.



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](#).

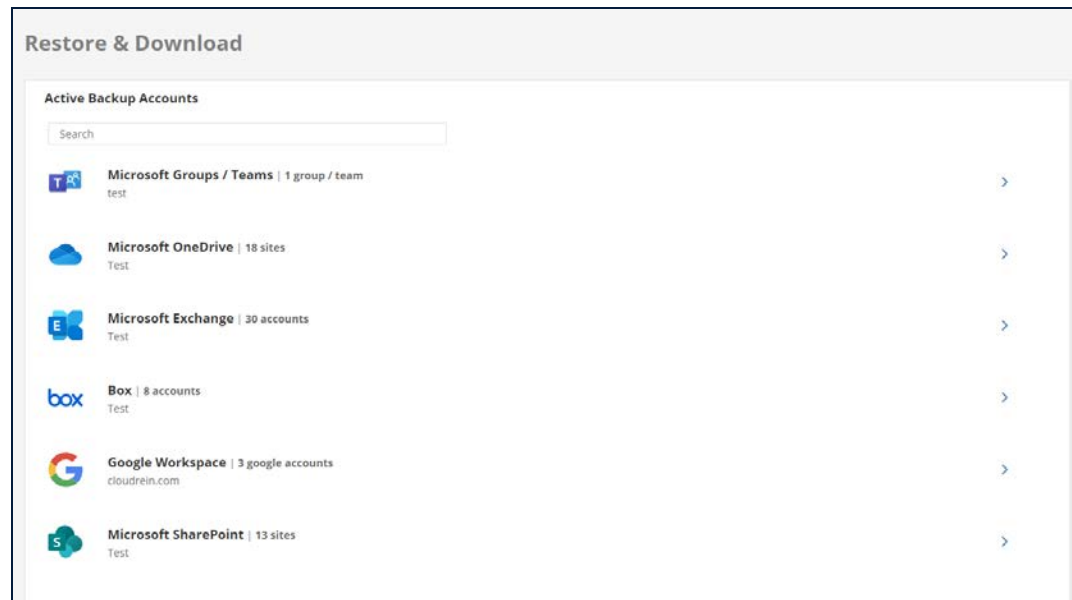
4 Recovering Your Backed Up Data

4.1 Using the Recovery Menu

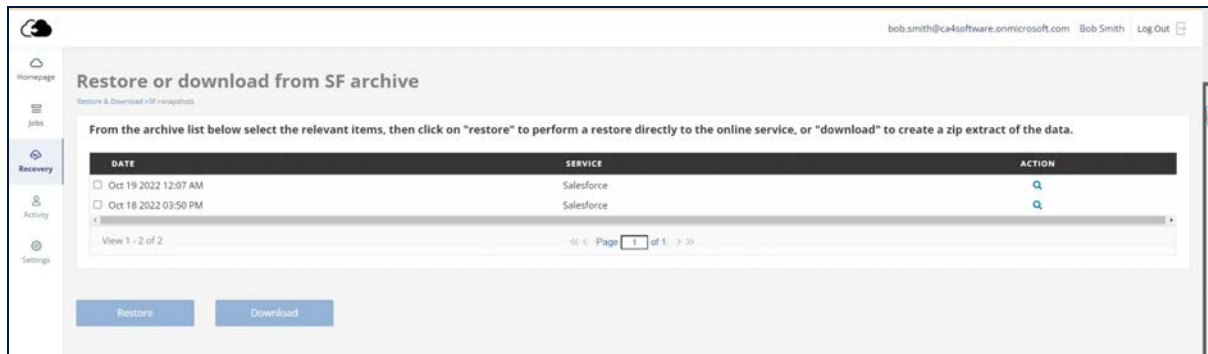
The Recovery Menu provides you with options at a fine granularity for selecting which account to restore or export.

To recover your backed up data:

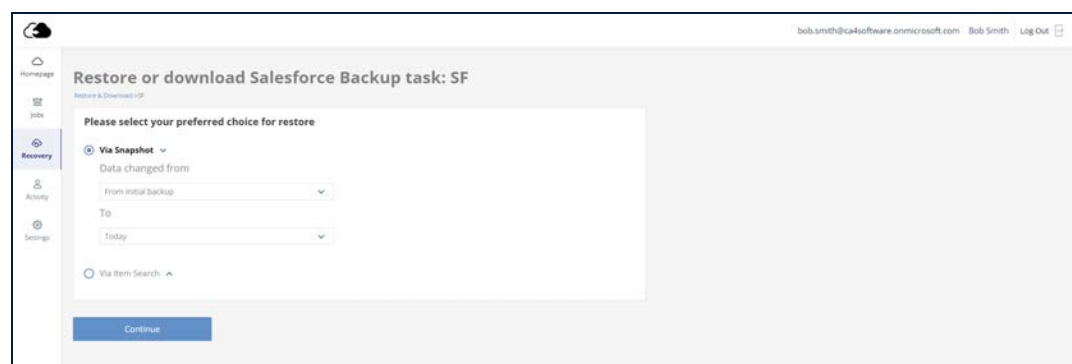
1. Click Recovery from the Navigation Panel. The *Restore & Download* page is displayed with all your active-backup account details.



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



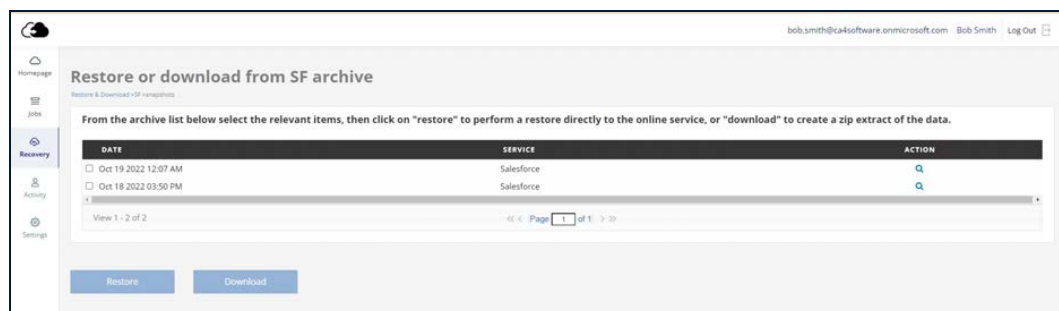
The *Restore or download Salesforce* page is displayed.



- 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 active 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

Please confirm the restore request

You are about to restore items from the archive of
bob.smith@ca4software.onmicrosoft.com?

Restore to

bob.smith@ca4software.onmicrosoft.com

☐ Include metadata

☐ Activate inactive users ?

☐ Disable triggers in restore ?

Restore mode for identical records: ?

☒ Replace: Restore will overwrite existing live data.

☐ Bypass: Existing data will be bypassed and not restored.

☐ Duplicate: Existing data will be duplicated.

Account type:

☒ Production

☐ Sandbox

*You can restore the data to a different organization.

A confirmation Email will be sent to you upon completion.

Cancel

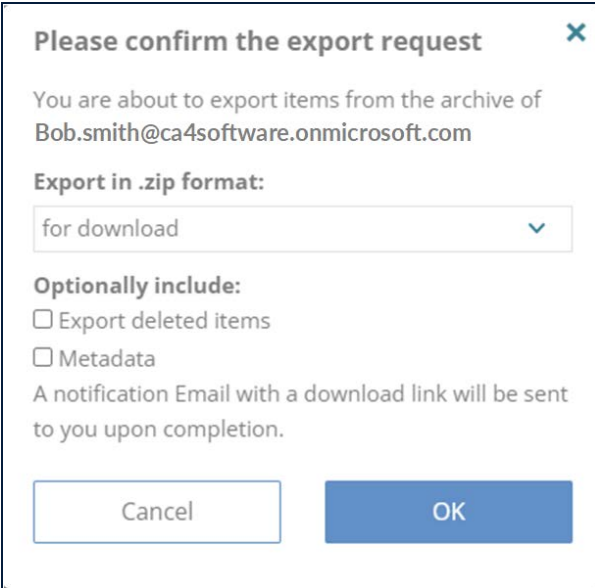
OK

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.



Please confirm the export request ✕

You are about to export items from the archive of
Bob.smith@ca4software.onmicrosoft.com

Export in .zip format:

for download ▼

Optionally include:

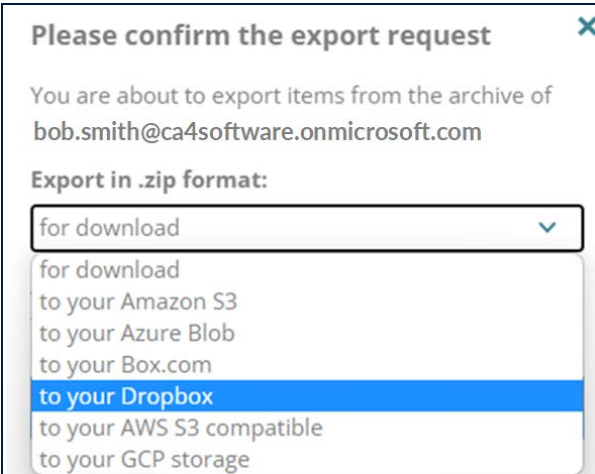
☐ Export deleted items

☐ Metadata

A notification Email with a download link will be sent
to you upon completion.

Cancel OK

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



Please confirm the export request ✕

You are about to export items from the archive of
bob.smith@ca4software.onmicrosoft.com

Export in .zip format:

for download ▼

- for download
- to your Amazon S3
- to your Azure Blob
- to your Box.com
- to your Dropbox**
- to your AWS S3 compatible
- to your GCP storage

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

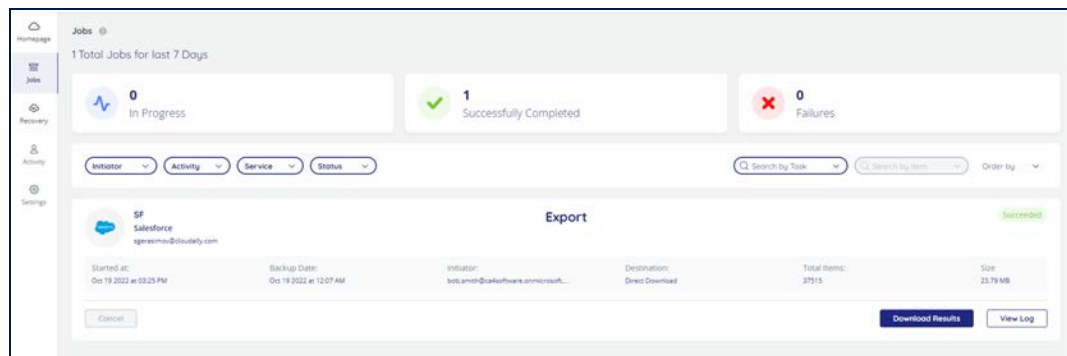
The Jobs page provides you with both high-level and drill-down views of your restore and export jobs over the last seven days.

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

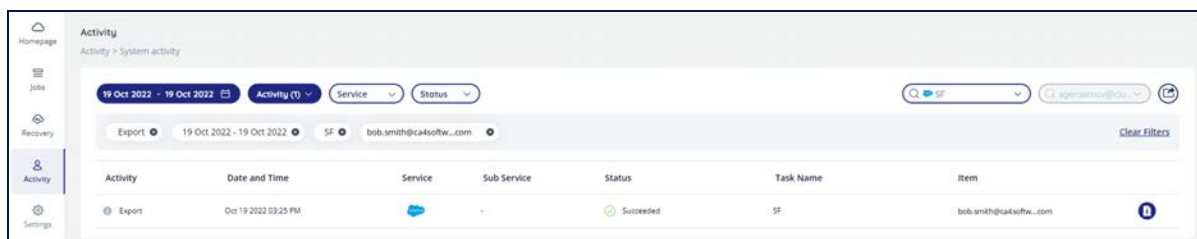
- **Status:** Filter by one of the following:
 - In progress
 - Succeeded
 - Partially succeeded
 - Failed
 - Pending
 - Canceled
- **Search by Task:** Filter by a task, such as:
 - Box
 - Dropbox
 - Google Workspace
 - Salesforce

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.

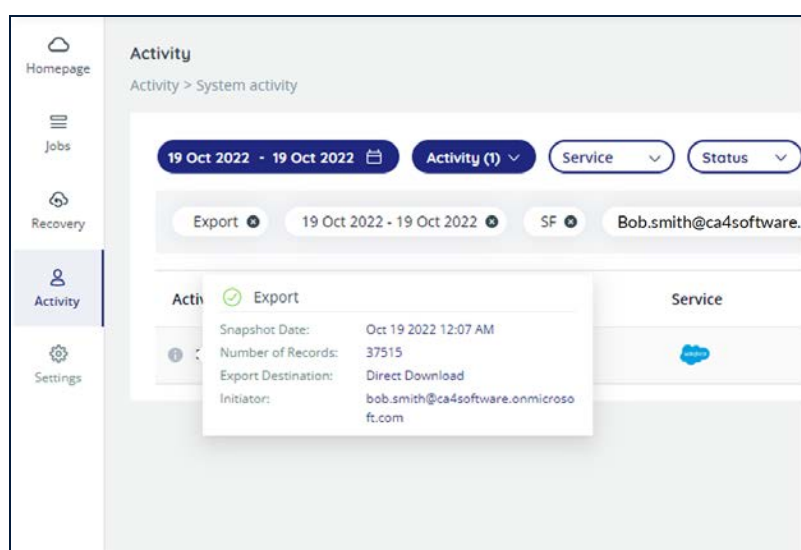


The screenshot shows the Salesforce Activity page with a table of backup tasks. The table has columns for Activity, Date and Time, Service, Sub Service, Status, Task Name, and Item. A single row is visible for an 'Export' activity.

Activity	Date and Time	Service	Sub Service	Status	Task Name	Item
Export	Oct 19 2022 03:25 PM	SF	-	Succeeded	SF	bob.smith@ca4softw...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 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.



The screenshot shows the Salesforce Activity page with an info pop-up displayed for an 'Export' activity. The pop-up contains the following details:

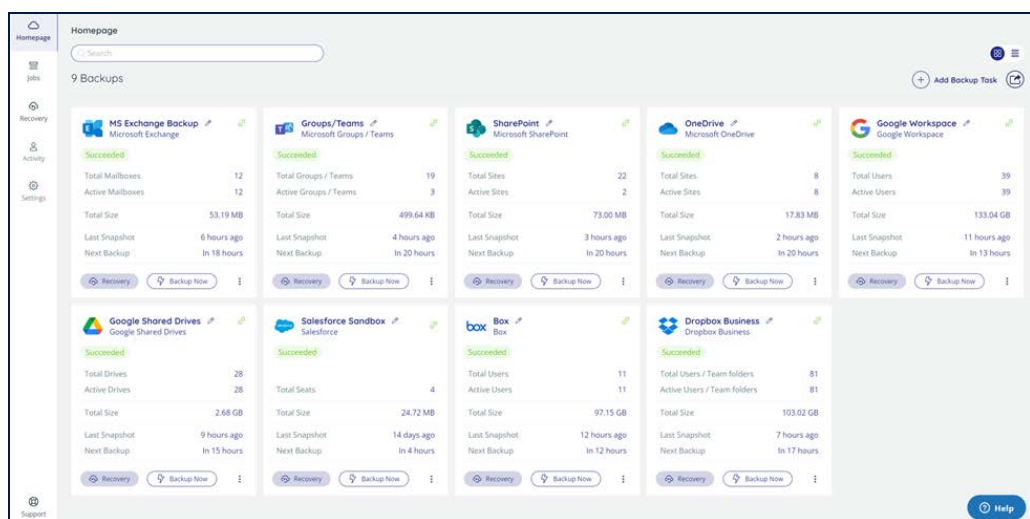
Export	
Snapshot Date:	Oct 19 2022 12:07 AM
Number of Records:	37515
Export Destination:	Direct Download
Initiator:	bob.smith@ca4software.onmicroso ft.com

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.

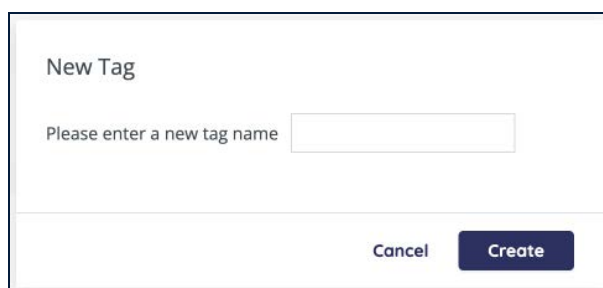


2. Click the Salesforce icon from the list or enter a keyword in the Search field to find a specific task. The *Salesforce Backup* page is displayed.
3. The *Salesforce Backup* page displays all the Salesforce accounts available for the administrator account you are using. The page displays the details 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.



A dialog box titled "New Tag" with a text input field labeled "Please enter a new tag name" and two buttons: "Cancel" and "Create".

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.

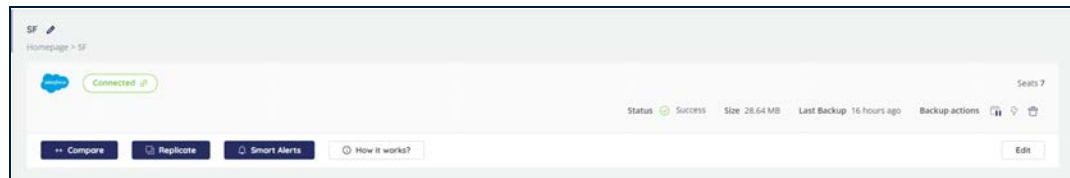
The summary tiles below the chart provide at-a-glance information about the backup: for each sub-service, they display the total number of items in the backup, the date of the last backup, and the outcome.

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:

Salesforce backup Comparison Select type and objects to compare

Data
Compare particular object (e.g Account or Opportunity) or all objects across two snapshots to identify changes to records and fields

Object
All objects

Metadata
Use this tool to compare all your metadata objects(e.g. Reports, Workflows, Apex Code, etc.) across two snapshots to identify changes

Cancel Next

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:

SF Comparison Select type and objects to compare

Data
Compare particular object (e.g Account or Opportunity) or all objects across two snapshots to identify changes to records and fields

Object
All objects

All objects
Account
PermissionSetTabSetting
WorkOrderStatus
FormulaFunctionAllowedType
Document
ServiceAppointmentStatus
ContentWorkspace

Cancel Next

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

Salesforce Comparison Select left and right side to compare

Salesforce Backup

Backup Task

Ren

Snapshot date

« < Dec 2020 > »

Su	Mo	Tu	We	Th	Fr	Sa
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

☒ Backup

Backup Task

Enterprise edition

Snapshot date

☐ Salesforce

← Back Cancel Start Compare

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.

Salesforce Comparison Select left and right side to compare

Salesforce Backup

Backup Task

Renat

Snapshot date

☒ Backup

Backup Task

Enterprise edition

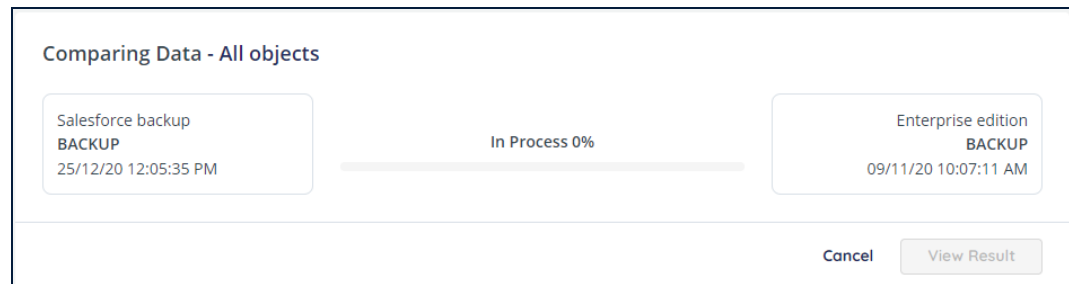
Snapshot date

« < Dec 2020 > »

Su	Mo	Tu	We	Th	Fr	Sa
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

← Back Compare

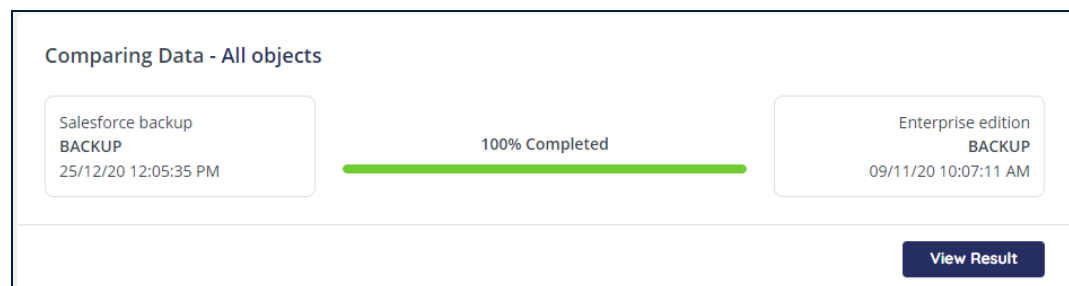
6. In the right panel, you can either select the backup task that will be used for comparison, or the Salesforce production database.
7. Once you have set the data sources, click **Start Compare**. The comparison task is started in the background, and the results will be available as soon as it is finished.



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 25/12/20 12:05:35 PM			Backup task Enterprise edition 09/11/20 10:07:11 AM		
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

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	DurableId	Label	MasterLabel	NamespacePref	DeveloperName	LogoUrl	Description	UiType	NavType	UtilityBar
2	0000000000000000	06m5J00000m7	Sales	salesforce	standard	Sales	/img/salesforce-1	The world's most popular sales	Aloha	Standard	
3	0000000000000000	06m2X000001D	Sales	salesforce.com	standard	Sales	/img/salesforce-1	The world's most popular sales	Aloha	Standard	

Backups

Backups >> Salesforce backup >> Compare

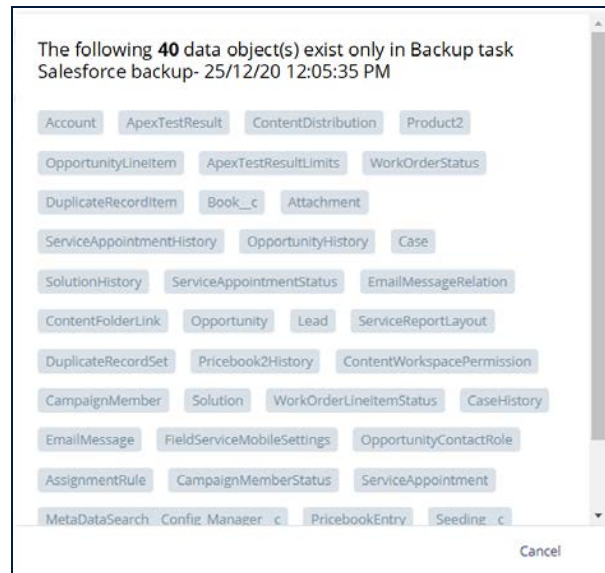
Backup task Salesforce backup 25/12/20 12:05:35 PM		log	Backup task Enterprise edition 09/11/20 10:07:11 AM	
Total Records	Unique Records	Changed Records	Unique Records	Total Records
4	4	IdpEventLog 0	16	16
6	6	UserLogin 0	3	3
67	67	LoginIp 0	14	14
662	662	EventLogFile 0	55	55
6921	6921	LoginGeo 0	1107	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

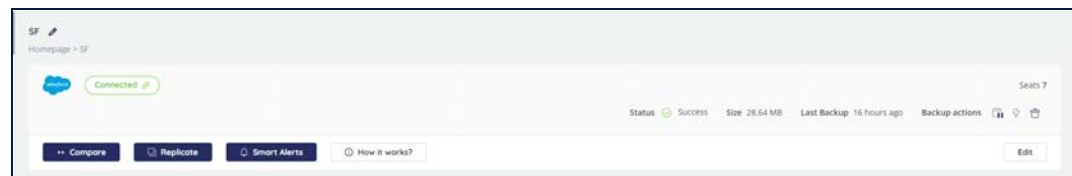
SF UG WL-CE 23.4.1
Rev. Date: December 17, 2023



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:

Salesforce backup Comparison Select type and objects to compare

Data
Compare particular object (e.g Account or Opportunity) or all objects across two snapshots to identify changes to records and fields

Metadata
Use this tool to compare all your metadata objects(e.g. Reports, Workflows, Apex Code, etc.) across two snapshots to identify changes

Object
All objects

Cancel Next

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:

Salesforce backup Comparison Select type and objects to compare

Data
Compare particular object (e.g Account or Opportunity) or all objects across two snapshots to identify changes to records and fields

Metadata
Use this tool to compare all your metadata objects(e.g. Reports, Workflows, Apex Code, etc.) across two snapshots to identify changes

Object
All objects

All objects
ApexClass
ApexComponent
ApexEmailNotifications
ApexPage
ApexTrigger
AppMenu
AssignmentRules

Cancel Next

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

Salesforce backup Comparison Select left and right side to compare

Salesforce Sandbox

Backup Task

Ren

Snapshot date

Su	Mo	Tu	We	Th	Fr	Sa
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

☒ Backup

Backup Task

Enterprise edition

Snapshot date

☐ Salesforce

☐ Other Organisation

← Back Cancel Start Compare

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:

The screenshot shows the 'Salesforce backup Comparison' window. At the top, it says 'Select left and right side to compare'. On the left, under 'Salesforce Sandbox', there is a 'Backup Task' section with a 'Run' button and a 'Snapshot date' input field. On the right, there are three radio button options: 'Backup', 'Salesforce', and 'Other Organisation'. The 'Other Organisation' option is selected. Below it, a message states: 'You will be asked to authorise on the organisation website. Don't worry we don't store your credentials'. There is a dropdown menu showing 'Production' as the selected item, with a list of options: 'Production', 'Production', and 'Sandbox'. At the bottom, there are three buttons: 'Back', 'Cancel', and 'Start Compare'.

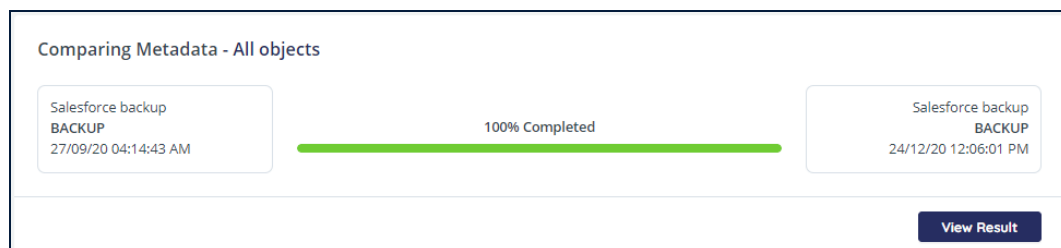
7. Once you have set the data sources click **Start Compare**. The comparison task is started in the background, and the results will be available as soon as it is finished.

The screenshot shows the 'Comparing Metadata Object - ApexClass' window. It displays a progress bar labeled 'In Process 0%'. On the left, there is a box for 'Salesforce backup BACKUP' with the timestamp '30/11/20 01:46:27 PM'. On the right, there is a box for 'Salesforce backup / Alyssa Roc... BACKUP' with the timestamp '10/11/20 12:09:48 PM'. At the bottom, there are two buttons: 'Cancel' and 'View Result'.

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:

Backups
Backups >> Salesforce backup >> Compare

Backup task Salesforce backup 27/09/20 04:14:43 AM		Search Object	Backup task Salesforce backup 24/12/20 12:06:01 PM	
Total Records	Unique Records		Unique Records	Total Records
75	0	sharingRules	4	79
151	0	objects	7	158
34	0	profiles	0	34
118	0	layouts	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		Q object	Backup task Salesforce backup 24/12/20 12:06:01 PM	
Total Records	Unique Records	Changed Records	Unique Records	Total Records
151	0	objects 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

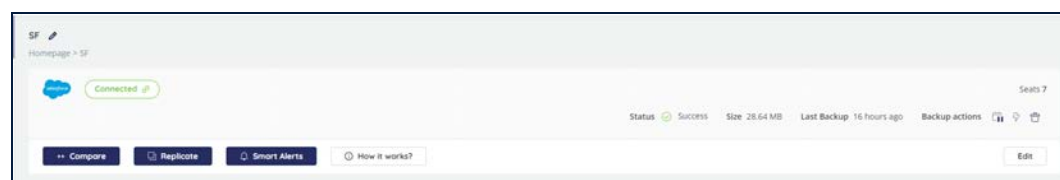
@@ -4744,6 +4744,11 @@			
4744	</fieldPermissions>	4744	</fieldPermissions>
4745	<fieldPermissions>	4745	<fieldPermissions>
4746	<editable>false</editable>	4746	<editable>false</editable>
		4747 +	<field>Case.AssetWarrantyId</field>
		4748 +	<readable>false</readable>
		4749 +	</fieldPermissions>
		4750 +	<fieldPermissions>
		4751 +	<editable>false</editable>
4747	<field>Case.BusinessHoursId</field>	4752	<field>Case.BusinessHoursId</field>
4748	<readable>false</readable>	4753	<readable>false</readable>
4749	</fieldPermissions>	4754	</fieldPermissions>
@@ -5093,6 +5098,16 @@			
5093	<readable>true</readable>	5098	<readable>true</readable>
5094	</fieldPermissions>	5099	</fieldPermissions>
5095	<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>
5096	<editable>true</editable>	5111	<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:

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

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**.

SF Data Replicate Select Destination

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

Multiple Parent Objects
Select Parent Objects to include in the replication data set. Our system will automatically identify the descendant related Object records and will include them in the replicate job as well. These records will be migrated to the destination Org with relationships

☐ Anonymize data ⓘ [Download the Full Anonymization Template](#)

← Back Cancel **Next**

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

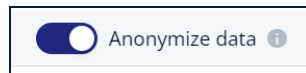
- Select **Full Organization** if you want to restore all data objects. See [Full Organization Replication](#) below.
- Select the **Multiple Parent Objects** options to select the objects you want to be replicated and, if needed, apply selection filters on them. See [Multiple Parent Objects](#) below.

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:

SF Data Replicate Data Anonymization

Choose object from the list below to determine which fields you want to anonymize.

Search Object

All Objects

- SlaProcess
- FormulaFunction
- Account
- LightningUsageByAppTypeMetrics
- TaskPriority
- SetupEntityAccess
- PermissionSetTabSetting

Search Fields

Only Anonymized	Replace with	Preview
BillingCity	City	New York
BillingPostalCode	Postal Code	10013
BillingState	State	New York
BillingStreet	Street	N. Moore
Fax	Phone	212-379-8543

Back Cancel Next

- 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.

SF Data Replicate Data Anonymization

Choose object from the list below to determine which fields you want to anonymize.

Search Object

All Objects

- SlaProcess
- FormulaFunction
- Account
- LightningUsageByAppTypeMetrics
- TaskPriority
- SetupEntityAccess
- PermissionSetTabSetting

Search Fields

Only Anonymized	Replace with	Preview
BillingCity	City	New York
BillingPostalCode	Postal Code	10013
BillingState	State	New York
BillingStreet	Street	N. Moore
Fax	Phone	212-379-8543

Back Cancel Next

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.

Salesforce backup Data Replicate Select Destination

☒ Same Organisation Sandbox
Bob.smith@onmicrosoft.com

☐ Other Organisation Sandbox
You will be asked to authorise on the organisation website. Don't worry we don't store your credentials

☒ Automatically disable all Validation Rules, Workflows, Triggers and Processes

← Back Cancel Replicate

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.

Replicating Data Object - All objects 28/12/20 11:37:16 AM

"IsUseRest" : true, 27/12/20 05:12:31 AM In Process 0% alyssaroche@yahoo.com Sandbox

6.3.1.4 Multiple Parent Objects

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

The screenshot shows a web interface titled "Salesforce Sandbox Replicate: Select type and snapshot date to Replicate". It features two main selection boxes. The first box, "Full Organisation", describes migrating all data. The second box, "Multiple Parent Objects", describes selecting parent objects and including descendant records. Below these boxes is a toggle for "Anonymize data" (currently off) and a link to "Download the Full Anonymization Template". At the bottom are "Back", "Cancel", and "Next" buttons.

Salesforce Sandbox Replicate: Select type and snapshot date to Replicate

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

Multiple Parent Objects
Select Parent Objects to include in the replication data set. Our system will automatically identify the descendant related Object records and will include them in the replicate job as well. These records will be migrated to the destination Org with relationships

☐ Anonymize data ⓘ [Download the Full Anonymization Template](#)

← Back Cancel **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**:

Salesforce backup Data Replicate Select Data Object

Search object

- ☐ Account
- ☐ Book__c
- ☐ BusinessHours
- ☐ Calendar
- ☐ Campaign
- ☐ CampaignMember
- ☐ Case
- ☐ ChatterActivity
- ☐ Contact
- ☐ Document
- ☐ Include Attachments ⓘ

Hierarchy depth 0 ⓘ

← Back Cancel Next

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.

The screenshot shows the 'Object Filtering' step in the 'Salesforce backup Data Replicate' process. The interface is divided into two main sections. On the left, there is a search bar labeled 'Search object' and a list of selected objects: 'GroupMember', 'ProcessNode', and 'Product2'. Each object has a 'Use all records' button and a close 'X' icon. A 'Deselect' button is located at the bottom of this list. On the right, the 'Filtering for' section shows 'All objects' selected. Below this, there are three radio button options: 'Use all records' (which is selected), 'Pick' (with a sub-option of '200' and a dropdown menu set to 'Newest'), and 'SOQL WHERE clause'. At the bottom of the interface, there are 'Back', 'Cancel', and 'Next' navigation buttons.

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.

Salesforce backup Data Replicate Object Filtering

You can narrow down the data being replicated, by filtering each object

Q Search object

GroupMember	SOQL WHERE clause	X
ProcessNode	Use all records	X
Product2	SOQL WHERE clause	X

Deselect

Filtering for All objects

☐ Use all records
☐ Pick 200 Newest records
☒ SOQL WHERE clause

Date_c IN(4252)

Press Shift + Enter to add a new line without validating the query

✓ Validation Complete

← Back Cancel Next

Click **Next**.

Customizing Data Anonymization Fields

You will see the following screen:

SF Data Replicate Data Anonymization

Choose object from the list below to determine which fields you want to anonymize.

Q Search Object

Q Search Fields

Default System Template

Only Anonymized	Replace with	Preview
BillingCity	City	New York
BillingPostalCode	Postal Code	10013
BillingState	State	New York
BillingStreet	Street	N. Moore
Fax	Phone	212-379-8543

← Back Cancel Next

- 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.

SF Data Replicate Data Anonymization

Choose object from the list below to determine which fields you want to anonymize.

Default System Template

Search Object

Search Fields

Only Anonymized

Replace with

Preview

Object	Field	Replace with	Preview
Account	BillingCity	City	New York
	BillingPostalCode	10013	10013
	BillingState	Phone	New York
	BillingStreet	E-mail	N. Moore
	Fax	Account Name	212-379-8543

Back

Cancel Next

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.

The screenshot shows a dialog box titled "Salesforce backup Data Replicate" with a subtitle "Select Destination". It contains two radio button options: "Same Organisation Sandbox" (selected) and "Other Organisation Sandbox". The "Same Organisation Sandbox" option shows the email "Bob.smith@onmicrosoft.com". The "Other Organisation Sandbox" option has a description: "You will be asked to authorise on the organisation website. Don't worry we don't store your credentials". Below these options is a checked checkbox labeled "Automatically disable all Validation Rules, Workflows, Triggers and Processes". At the bottom, there are three buttons: "Back" (with a left arrow), "Cancel", and "Replicate" (in a blue box with a document icon).

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.

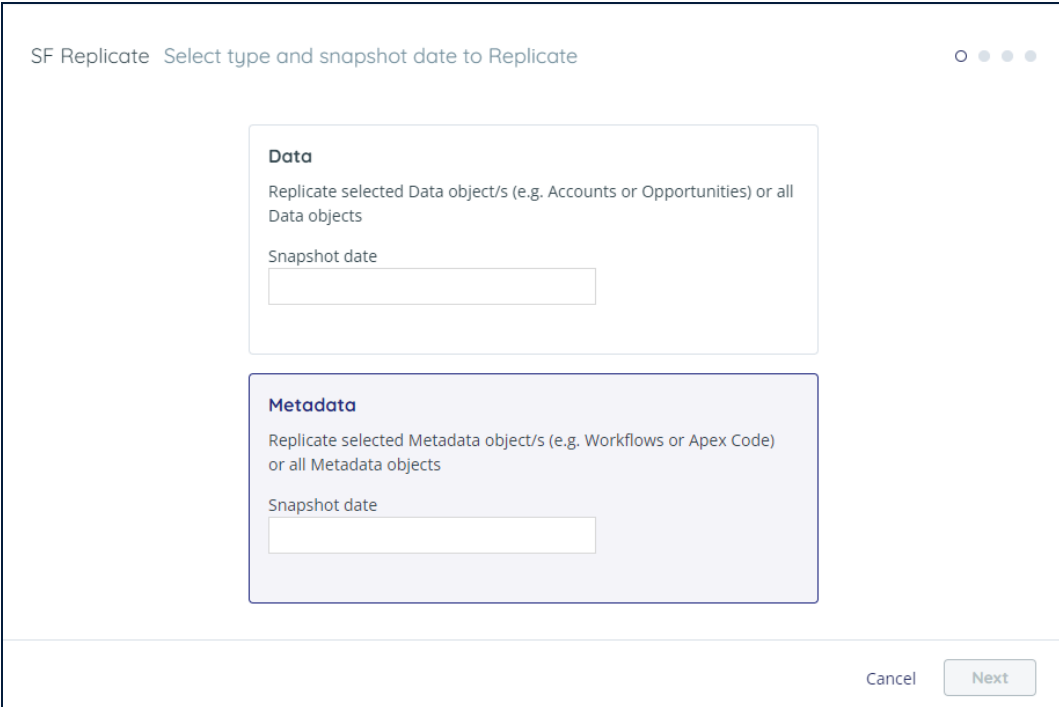
The screenshot shows a progress bar for "Replicating Data Object - 3 Objects". On the left, a box contains "Salesforce backup" and "25/12/20 05:11:48 AM". In the center, a progress bar is labeled "In Process 0%". On the right, a box contains "alyssaroche@yahoo.com" and "Sandbox". The top right corner shows the timestamp "28/12/20 11:48:08 AM".

6.3.2 Replicating Metadata

To initiate the metadata comparison procedure, follow these steps:

The screenshot shows the Salesforce backup interface. At the top, it says "SF" and "Homepage > SF". Below that, there's a "Connected" status with a green checkmark. On the right, it says "Seats 7". Below the status bar, there's a row of buttons: "Compare", "Replicate", "Smart Alerts", and "How it works?". To the right of these buttons, there's a row of information: "Status: Success", "Size: 28.64 MB", "Last Backup: 16 hours ago", and "Backup actions" with icons for a list, a refresh, and a trash. At the bottom right, there's an "Edit" button.

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



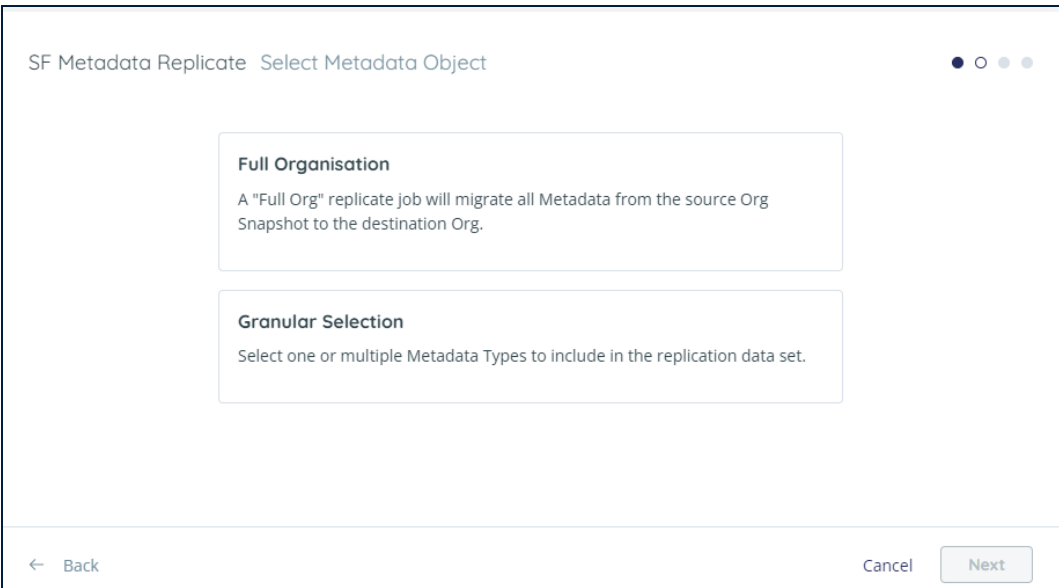
SF Replicate Select type and snapshot date to Replicate

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

2. 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.

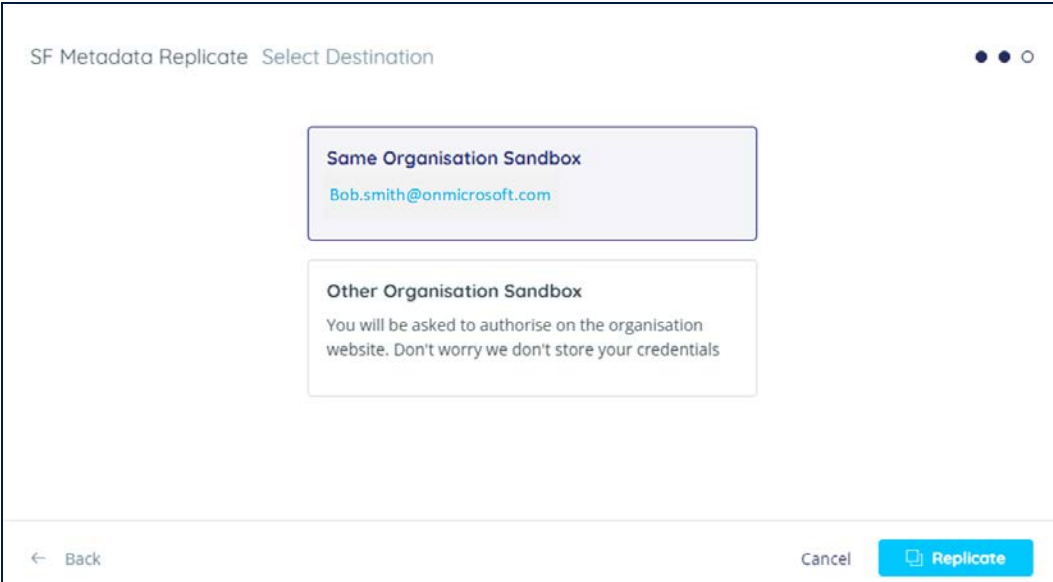
Granular Selection
Select one or multiple Metadata Types to include in the replication data set.

← 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.

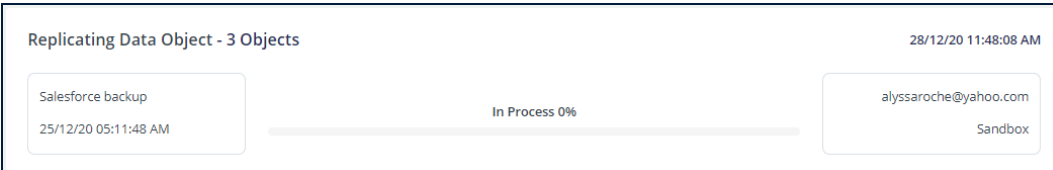
6.3.2.1 Full Organization

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.



The screenshot shows a dialog box titled "SF Metadata Replicate Select Destination". It contains two main options: "Same Organisation Sandbox" with the email "Bob.smith@onmicrosoft.com" and "Other Organisation Sandbox" with a note that authorization will be required. At the bottom, there are "Back", "Cancel", and "Replicate" buttons.

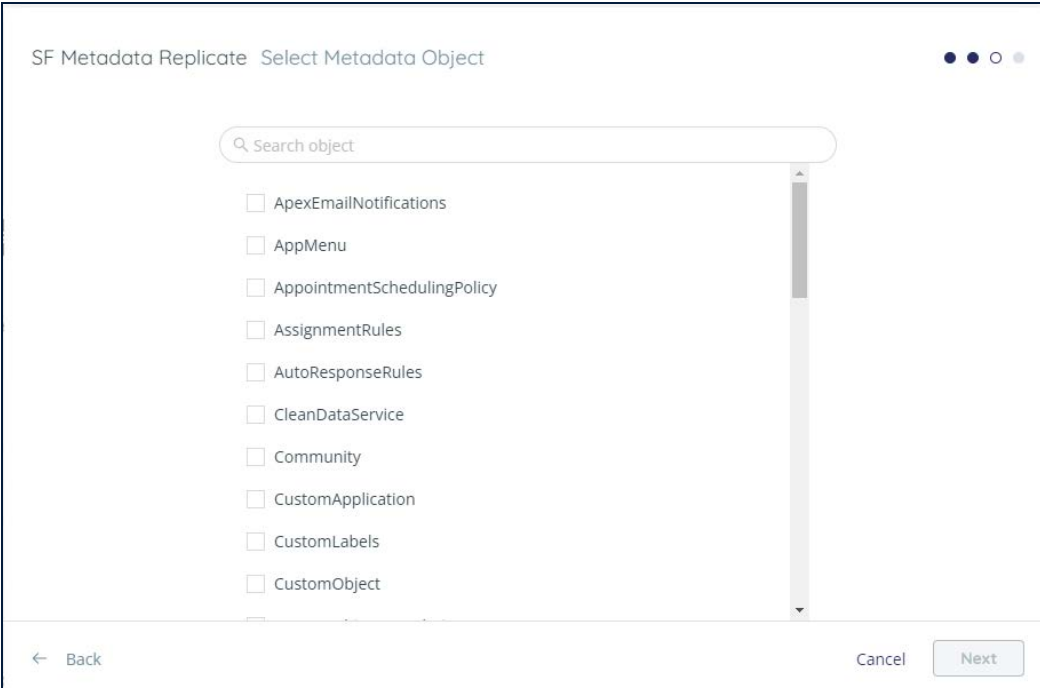
Click **Replicate** to create the replication task. The task will be assigned to the next available processing machine - this may take several minutes. You can view the progress of the task in the *Replicates* tab of the backup page.



The screenshot shows a progress bar for "Replicating Data Object - 3 Objects". It includes a "Salesforce backup" box with the timestamp "25/12/20 05:11:48 AM", a progress indicator showing "In Process 0%", and a "Sandbox" box with the email "alyssaroche@yahoo.com". The top right corner shows the date and time "28/12/20 11:48:08 AM".

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:

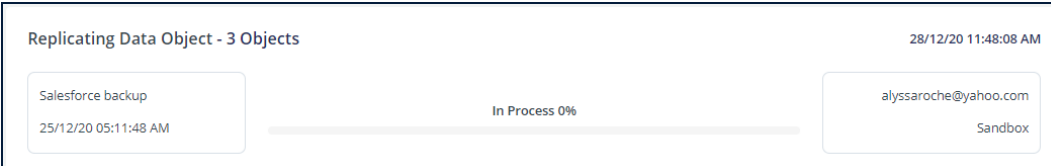


The image shows a dialog box titled "SF Metadata Replicate Select Metadata Object". It features a search bar at the top with the placeholder text "Search object". Below the search bar is a list of metadata objects, each with a checkbox: ApexEmailNotifications, AppMenu, AppointmentSchedulingPolicy, AssignmentRules, AutoResponseRules, CleanDataService, Community, CustomApplication, CustomLabels, and CustomObject. At the bottom of the dialog, there are three buttons: "Back" (with a left arrow), "Cancel", and "Next" (with a right arrow).

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.



The image shows a progress bar titled "Replicating Data Object - 3 Objects". The progress bar is labeled "In Process 0%". On the left side of the progress bar, there is a box containing the text "Salesforce backup" and "25/12/20 05:11:48 AM". On the right side of the progress bar, there is a box containing the text "alyssaroche@yahoo.com" and "Sandbox". The date and time "28/12/20 11:48:08 AM" are displayed in the top right corner.

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.

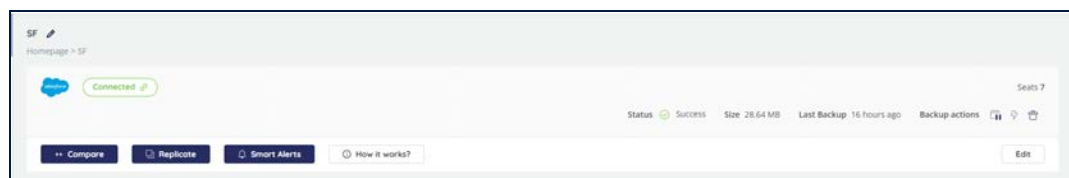
- Customize Smart Alerts to detect irregular objects changes such as addition, deletion, or updates between backup snapshots, based on your predefined threshold.
- Get email notifications with a snapshot report of Salesforce objects changes that triggered the Smart alert.
- Use historical backup snapshots 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**.

The screenshot shows a configuration window titled "Salesforce Backup Smart Alert" with a subtitle "Select Alert Level". In the top right corner, there are three dots, with the first one being active. The window contains three selectable options, each in a light gray box with a purple border:

- All Objects**: Create an Alert for all Objects that compares changes between the previous and latest Backup. This option is highlighted with a purple background.
- Specific Object**: Create an Alert for Specific Object that compares changes between the previous and latest Backup. Below this is a section titled "Choose a Specific Object" with a dropdown menu labeled "Trigger Object".
- Record Level Alert**: Create an Alert when records are changed between the previous and latest Backup. A "COMING SOON" badge is visible in the top right corner of this box.

At the bottom right of the window, there are two buttons: "Cancel" and "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**.

The screenshot shows the 'Salesforce Backup Smart Alert' configuration interface. The title bar reads 'Salesforce Backup Smart Alert Select Alert Level'. There are three radio buttons for selection: 'All Objects', 'Specific Object' (which is selected), and 'COMING SOON'. Below 'All Objects' is the text 'Create an Alert for all Objects that compares changes between the previous and latest Backup'. Below 'Specific Object' is the text 'Create an Alert for Specific Object that compares changes between the previous and latest Backup'. Under 'Specific Object', there is a section 'Choose a Specific Object' with a search bar labeled 'Trigger Object'. A dropdown menu is open, showing a list of Salesforce objects: Account, AppMenuItem, Campaign, CampaignMemberStatus, Case, Contact, ContentDistribution, and ContentDocument. At the bottom right, there are 'Cancel' and 'Next' buttons.

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

The screenshot shows the 'Smart Alert For All Objects' configuration interface. The title bar reads 'Smart Alert For All Objects Select Alert Configuration'. There are three radio buttons for selection: 'Single User' (which is selected), 'All Users', and 'COMING SOON'. Below 'Single User' is the text 'Changes made by a single user'. Below 'All Users' is the text 'Changes made by all users'. On the left side, under the heading 'Alert when more than', there are three input fields: 'Choose An Amount' with a value of '0', 'Choose Unit' with a dropdown menu showing 'Select Unit', and 'Choose an Event' with a dropdown menu showing 'Select Event'. At the bottom left, there is a 'Back' button with a left arrow. At the bottom right, there are 'Cancel' and 'Next' buttons.

- 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**.

Smart Alert For All Objects Review & Confirmation

You have configured to notify you when

More than

In All Objects are

Triggered by

← Back Cancel **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.

Cloud

Homepage

Jobs

Recovery

Activity

Settings

SF

Homepage > SF

Connected

Status

Success

Size 31.83 MB

Last Backup 13 hours ago

Backup actions

Seats 7

Compare

Replicate

Smart Alerts

How it works?

Edit

Objects

Compares

Replicates

Smart Alerts

4 Total Smart Alerts

Search by Trigger Object.

Event

Triggered By

Action

Add New Alert

<input type="checkbox"/>	Trigger Object	Rule	Total	Unit	Event	Triggered By	
<input type="checkbox"/>	All Objects	More than	1000	Records	Deleted	Single User	
<input type="checkbox"/>	Campaign	More than	250	Records	Deleted	All Users	
<input type="checkbox"/>	Document	More than	150	Records	Updated	Single User	
<input type="checkbox"/>	Task	More than	25	%	Updated	Single User	

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**.

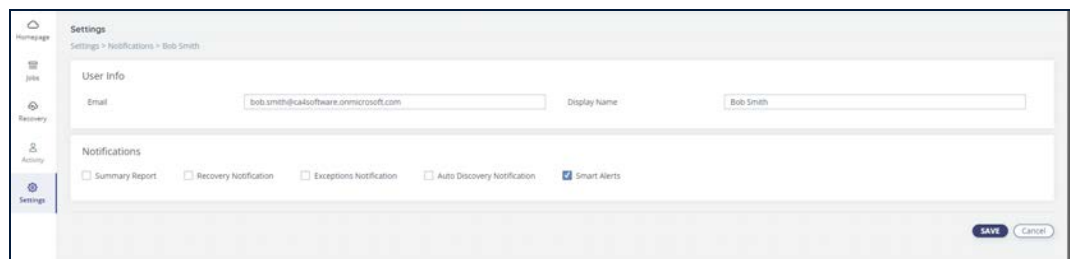
Finally, you can disable or enable an alert, by clicking the bell icon.

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**.



The screenshot shows the Salesforce user settings interface. On the left is a navigation panel with icons for Home, Jobs, Recovery, Activity, and Settings. The main content area is titled 'Settings' and 'Settings > Notifications > Bob Smith'. It contains a 'User Info' section with input fields for 'Email' (containing 'bob.smith@caaksoftware.onmicrosoft.com') and 'Display Name' (containing 'Bob Smith'). Below this is a 'Notifications' section with five checkboxes: 'Summary Report', 'Recovery Notification', 'Exceptions Notification', 'Auto Discovery Notification', and 'Smart Alerts'. The 'Smart Alerts' checkbox is checked. At the bottom right of the form are 'SAVE' and 'Cancel' buttons.

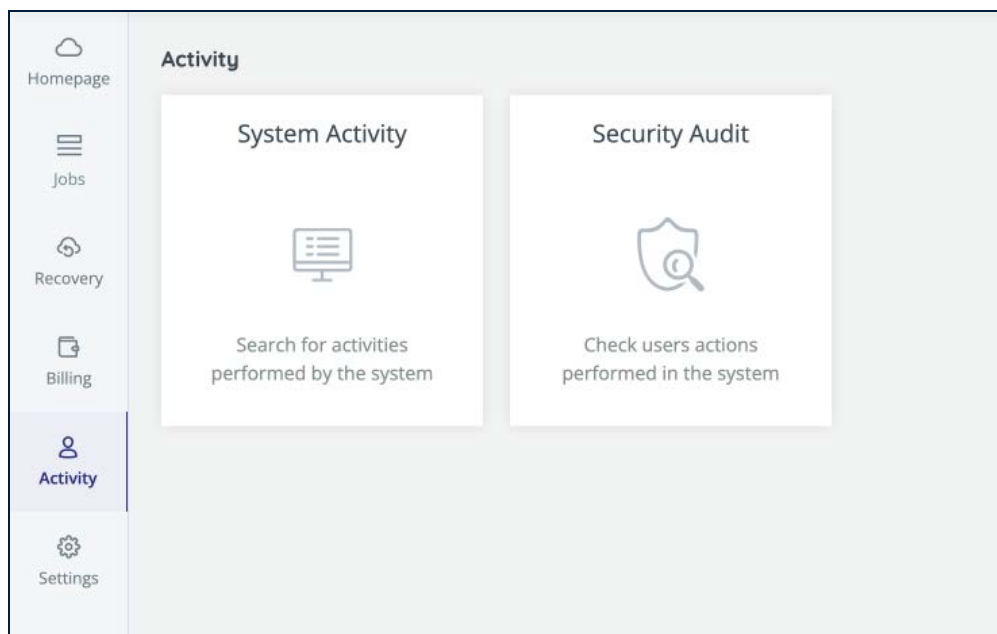
When changes trigger a Smart Alert, all of the users on the list will receive an email that summarizes what has changed. With this information, Admins can investigate the changes, and take appropriate the appropriate action.

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.

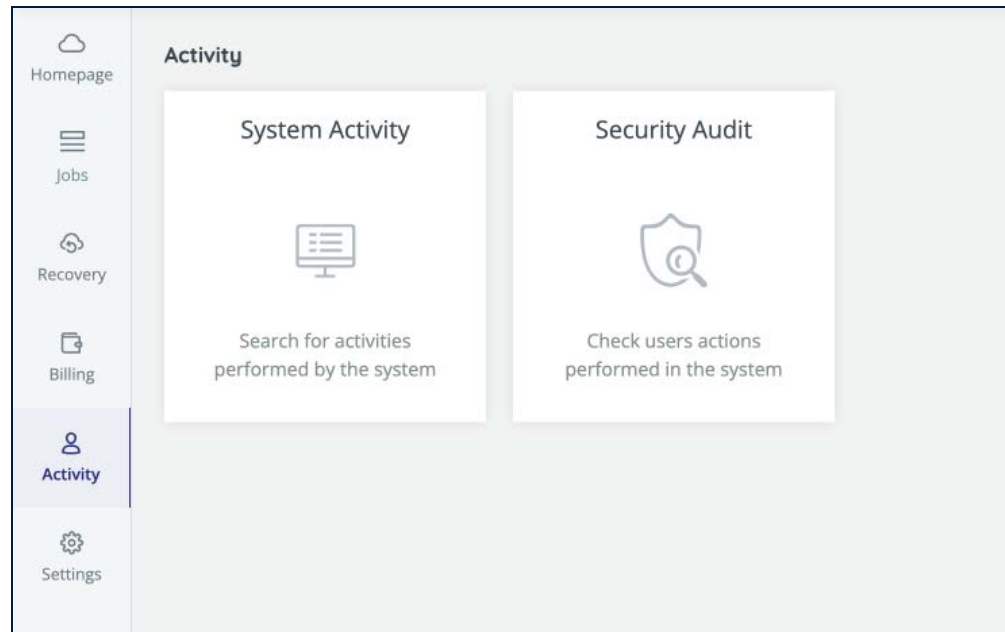
7.1 Viewing Account Activity

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

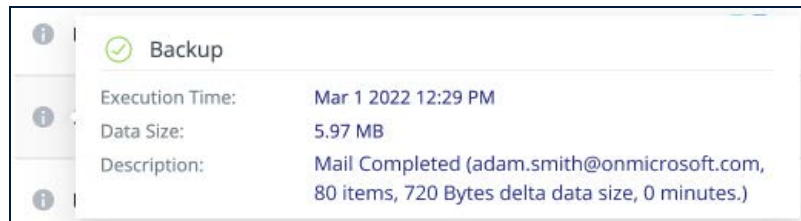
Click **System Activity**.



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						
Activity > System activity						
Start date - End date		Activity		Service		Status
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@ca...	bob.smith@ca4software.onmicrosoft.com
Backup	Jul 11 2022 01:01 PM			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_Lind...	AltaroRestored_Linda_Fuller_2021_08_31_05_36
Restore	Jul 11 2022 01:00 PM			Succeeded	One Drive / cloudify1-my.sharepoint.co...	.../Zsepo_kuzandev_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:

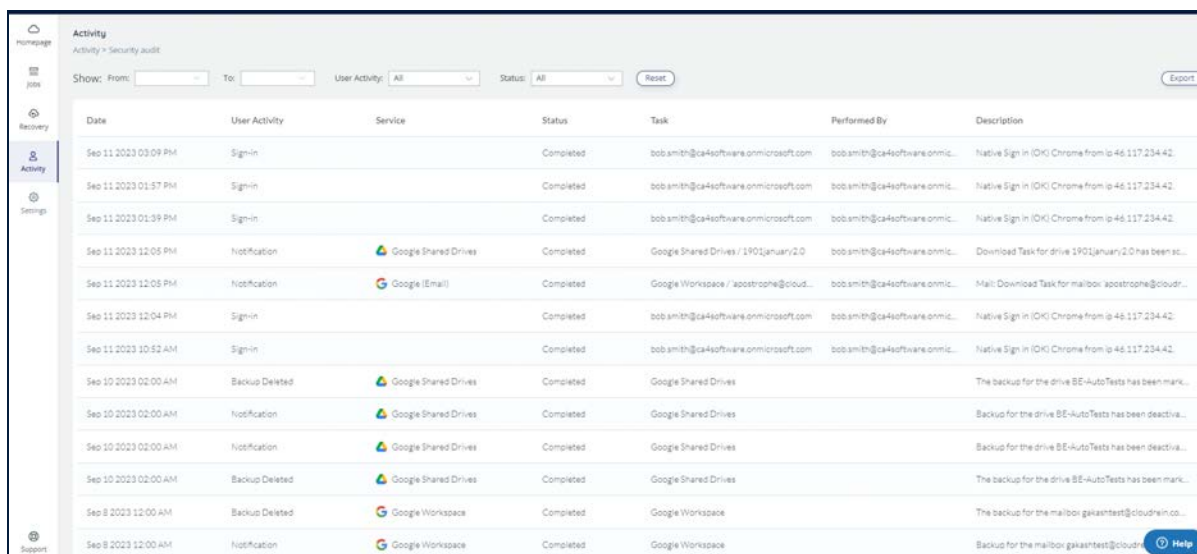


7.1.2 Security Audit

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.



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.onmic...	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.onmic...	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.onmic...	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 / 1901January20	bob.smith@ca4software.onmic...	Download Task for drive 1901January20 has been sc...
Sep 11 2023 12:05 PM	Notification	Google (Email)	Completed	Google Workspace / apocrophe@cloud...	bob.smith@ca4software.onmic...	Mail: Download Task for mailbox apocrophe@cloudr...
Sep 11 2023 12:04 PM	Sign-in		Completed	bob.smith@ca4software.onmicrosoft.com	bob.smith@ca4software.onmic...	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.onmic...	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 gikantest@cloudnail.co...
Sep 8 2023 12:00 AM	Notification	Google Workspace	Completed	Google Workspace		Backup for the mailbox gikantest@cloudnail.co...

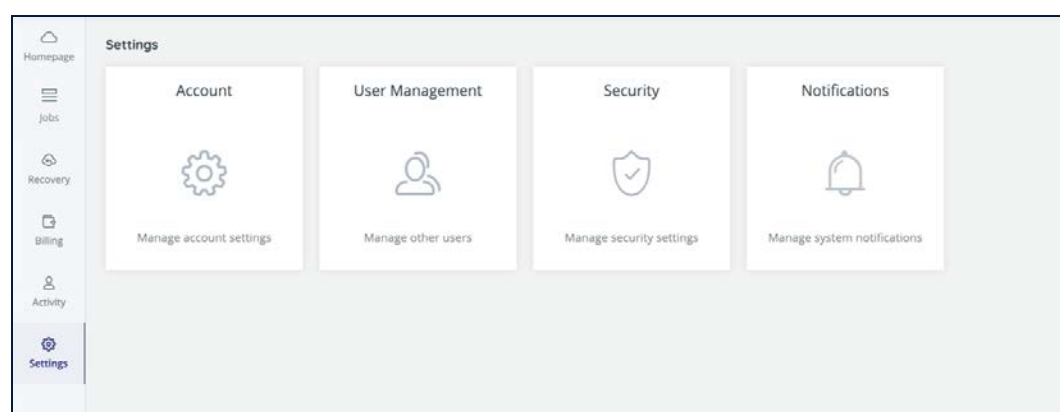
The Security audit table can be exported as a CSV file by clicking **Export**.

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**

The screenshot shows the 'Settings' page in Salesforce, specifically the 'Account' section. The left sidebar contains links for 'Homepage', 'Recovery', 'Billing', 'Security', and 'Settings' (which is highlighted). The main content area is titled 'Settings' and 'Settings > Account'. It contains the following fields and options:

- Account Name:** A text field with the value 'Bob Smith'.
- Email:** A text field with the value 'Bob.smith@ca4software.onmicrosoft.com'. To its right, there is a section for 'New Email - Waiting for Approval' with a text field containing 'username@company.com' and a 'Discard' link.
- Data Center Location:** A dropdown menu showing 'US East (Northern Virginia)'.
- Buttons:** 'Save' and 'Cancel' buttons are located at the bottom right.
- Notes:** A yellow note states: 'Note: Confirmation was sent to your new email username@company.com and is waiting for your approval.' A link 'Resend Email Confirmation' is provided next to it.
- Footer:** A small text line reads: 'If you change your email address, we will send an email to your new address for confirmation. The new address will not become active until it is confirmed.'

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.

The screenshot shows a confirmation pop-up window titled 'Are you sure?'. It contains a text field with the text 'I approve the removal of my data from the Backup Service.' and two buttons at the bottom: 'YES' (highlighted in blue) and 'NO' (in a light gray box). A close button 'X' is in the top right corner.

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.

Settings
 Settings > User Management

The following external credentials are currently linked to your Backup Service account.

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

Add new user

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

Page 1 of 1
 Showing 1-3 of 3

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: Type:

Password: Role:

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 backup 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

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**.

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.


A confirmation message has been sent to jessica.miller@ca4software.onmicrosoft.com. Follow the link in the message to confirm the new address.

	Type	2FA Authentication
jessica.miller@ca4software.onmicrosoft.com	Email	
jessica.miller@ca4software.onmicrosoft.com	Email	Resend Email Confirmation
Sarah.Johnson@ca4software.onmicrosoft.com	Email	

Page 1 of 1

7.4 Security Settings

The *Security Settings* page enables you to:




Personal Password Policies

Change your account password [Change password](#)

You can also use Two-Factor Authentication [Activate 2FA](#)

- Update your password
- Set up two-factor authentication

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



Enforce The Following Password Policies On All Users

☒ Enforce Two-Factor Authentication on all users ⓘ

Password Expiration: ☒ Password expires after (days):

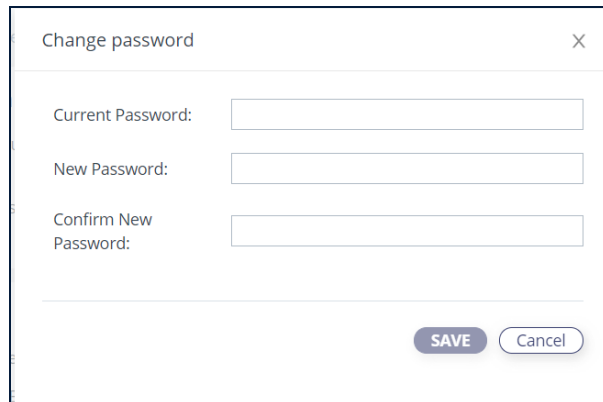
[Cancel](#) [Save](#)

- 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.

A dialog box titled "Change password" with a close button (X) in the top right corner. It contains three input fields: "Current Password:", "New Password:", and "Confirm New Password:". At the bottom right, there are two buttons: "SAVE" and "Cancel".

Change password X

Current Password:

New Password:

Confirm New Password:

SAVE Cancel

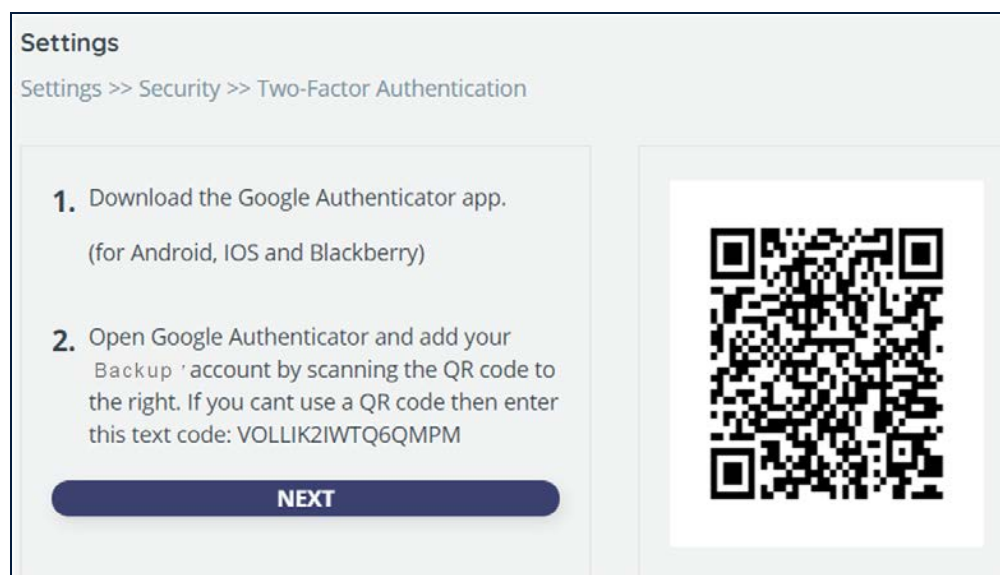
3. Enter the current password in the *Current Password* field.
4. Enter the new password in the *New Password* field.
5. Re-enter the new password in the *Confirm New Password* field.
6. Click **SAVE**. You can now use this password to access your account.

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.


A screenshot of the "Settings" page for Two-Factor Authentication. The breadcrumb trail is "Settings >> Security >> Two-Factor Authentication". The page contains two numbered steps: 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 cant use a QR code then enter this text code: VOLLIK2IWTQ6QMPPM. A large QR code is displayed on the right. At the bottom left, there is a "NEXT" button.

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 cant use a QR code then enter this text code: VOLLIK2IWTQ6QMPPM

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).

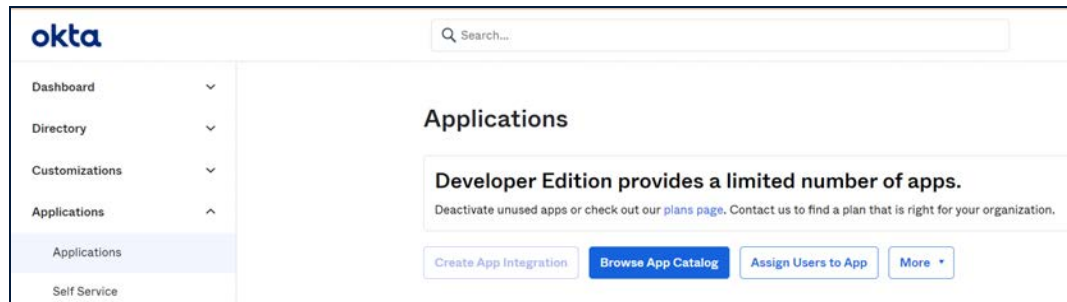
Our backup service supports Okta as its SAML provider.

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

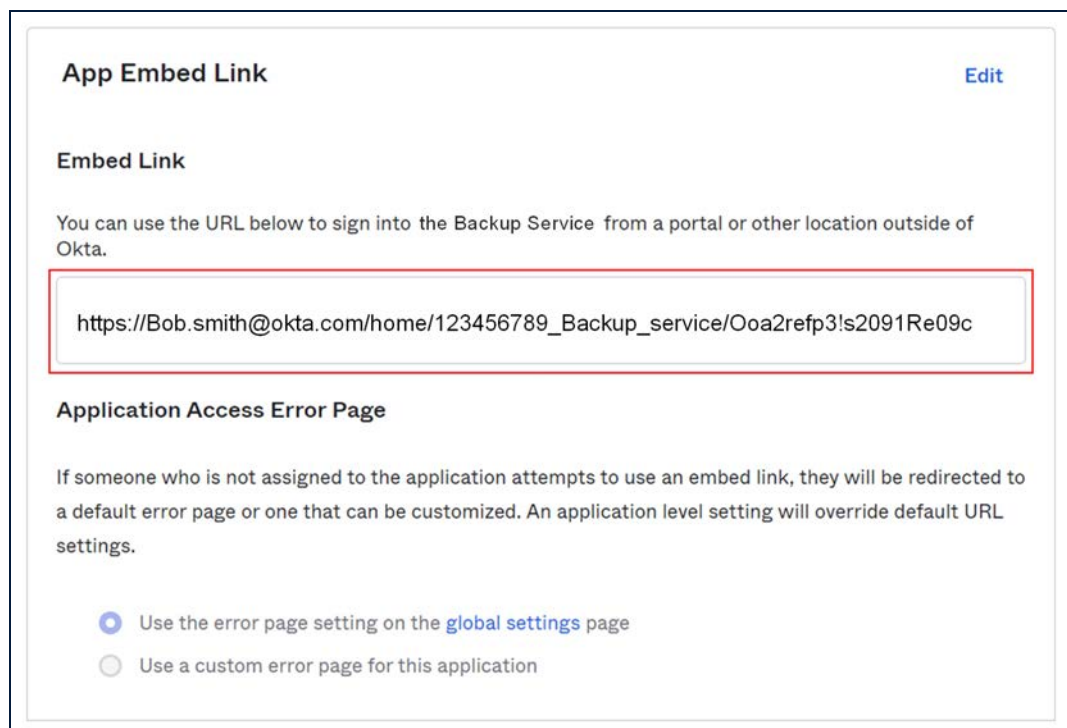
- Setting up our Backup Service in the Okta Application
- Setting up Okta in our backup service application

7.4.3.1 Setting up our Backup Service in the Okta Application

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

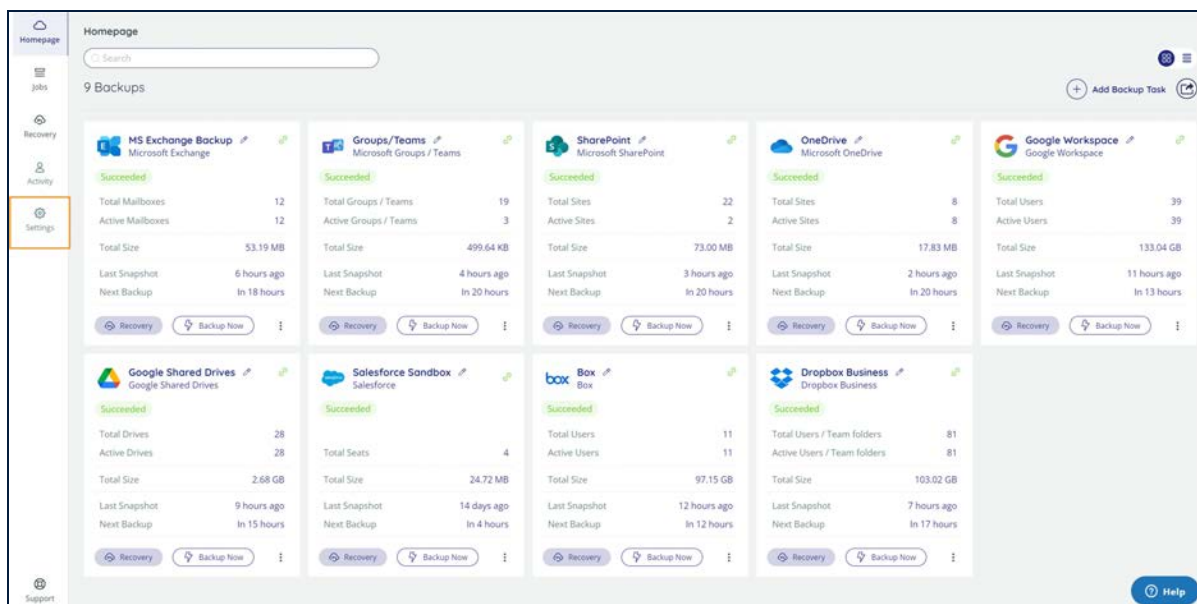


- In the search bar, enter our backup service.
- Click the arrow next to Backup Service SAML, and **Assign to Users** or **Assign to Groups**.
- Click Backup Service SAML, and on the next page, click the **General** tab.
- Scroll down until you see the **App Embed Link** section. Copy the URL that is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

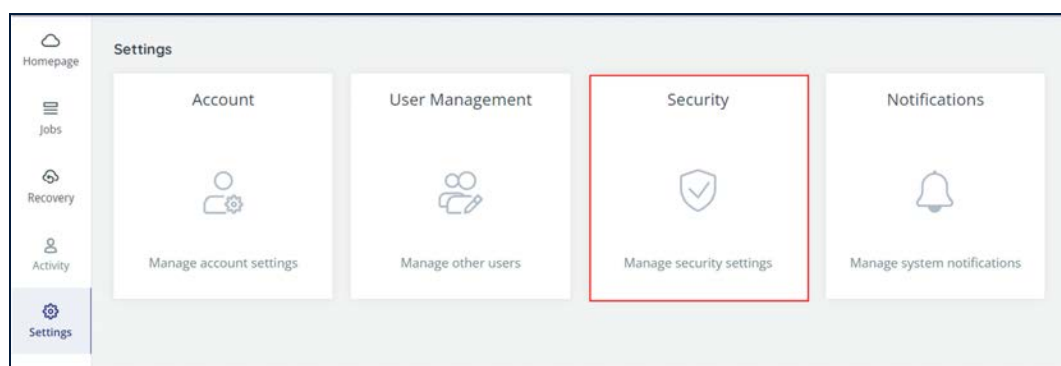


7.4.3.2 Setting Up Okta in our Backup Service Application

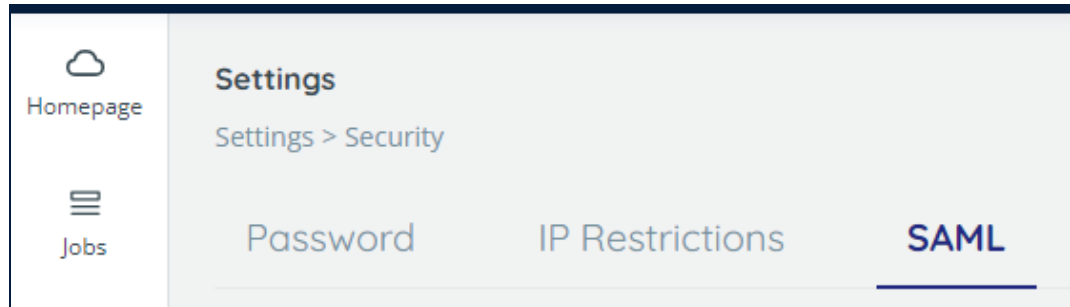
1. From the Homepage, click **Settings** in the Navigation panel.



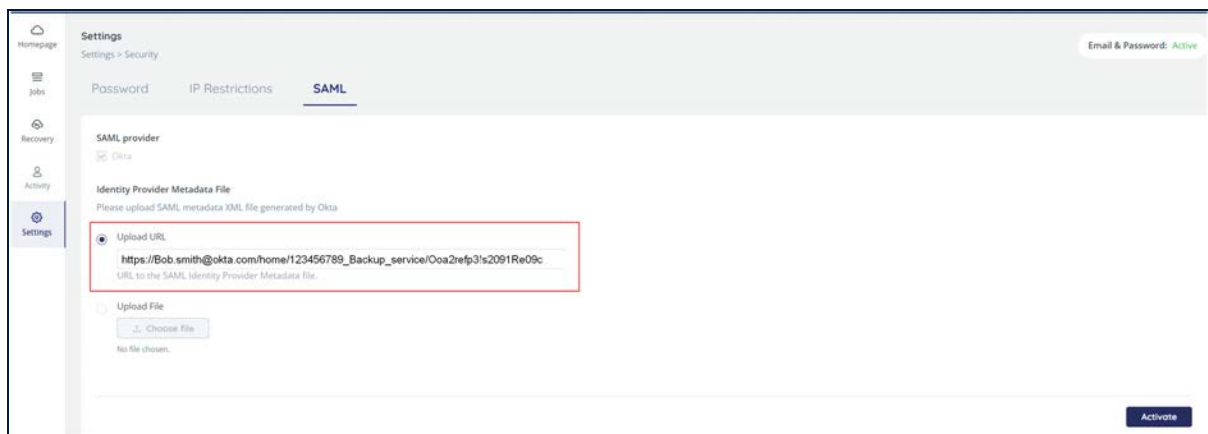
2. On the Settings page, click **Security**.



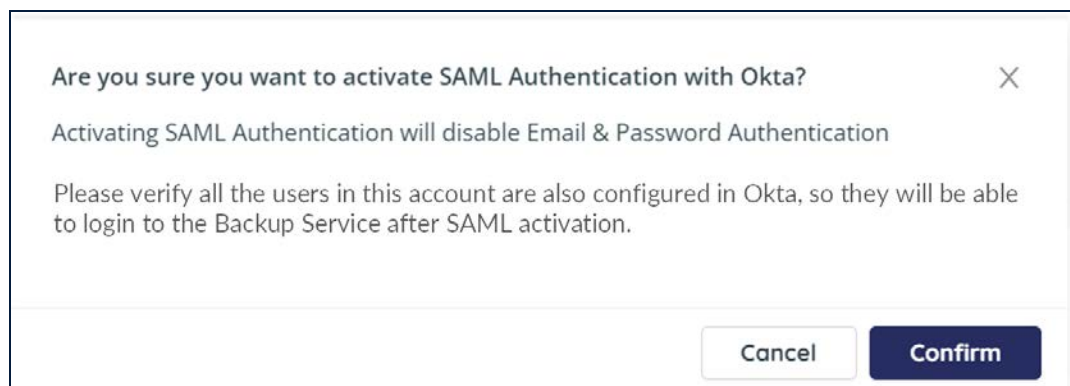
3. Click the **SAML** tab.



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.

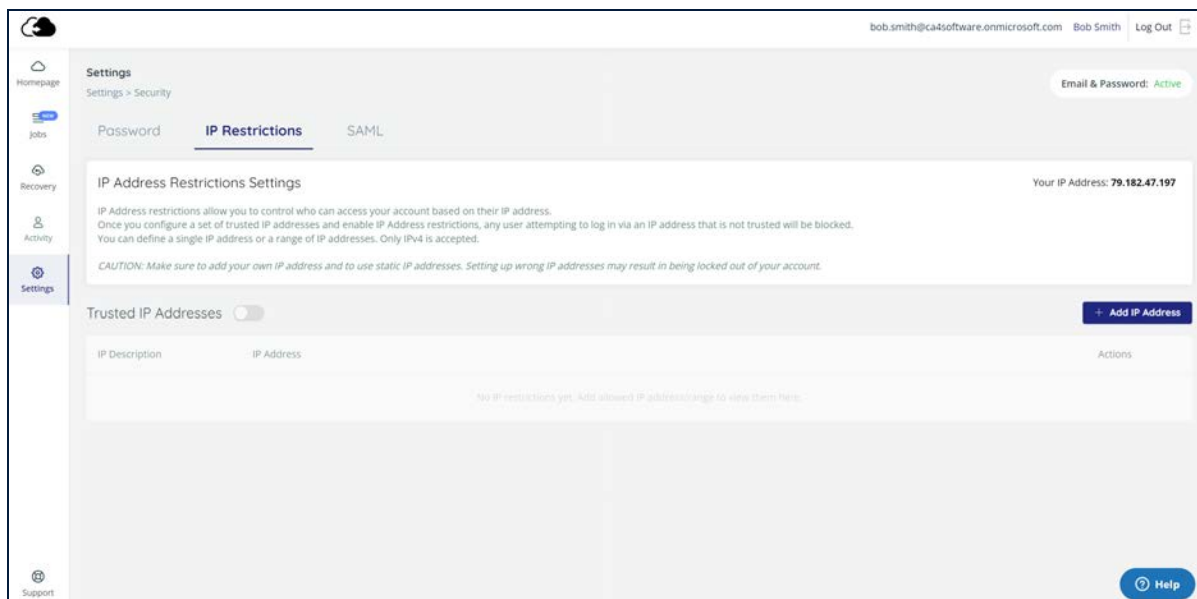
Setting Up IP Restrictions

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

- b. 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
 Example 192.168.10.5

☒ Trusted IP Address Range
 From To
 79.181.255.0 - 79.181.255.16
 Example 192.168.10.0 - 192.168.10.255

Cancel
Save

- 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.

Home
Recovery
Billing
Security
Settings
Support

Security Settings

Settings > Security

[Password](#)
[SAML](#)
[IP Restrictions](#)

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 enable 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 ☒

IP Description
IP Address
Actions

Office	192.168.10.5, 192.168.10.120, 192.168.40.157, 192.168.60.180	Edit Delete
--------	--	-------------

Add IP Address

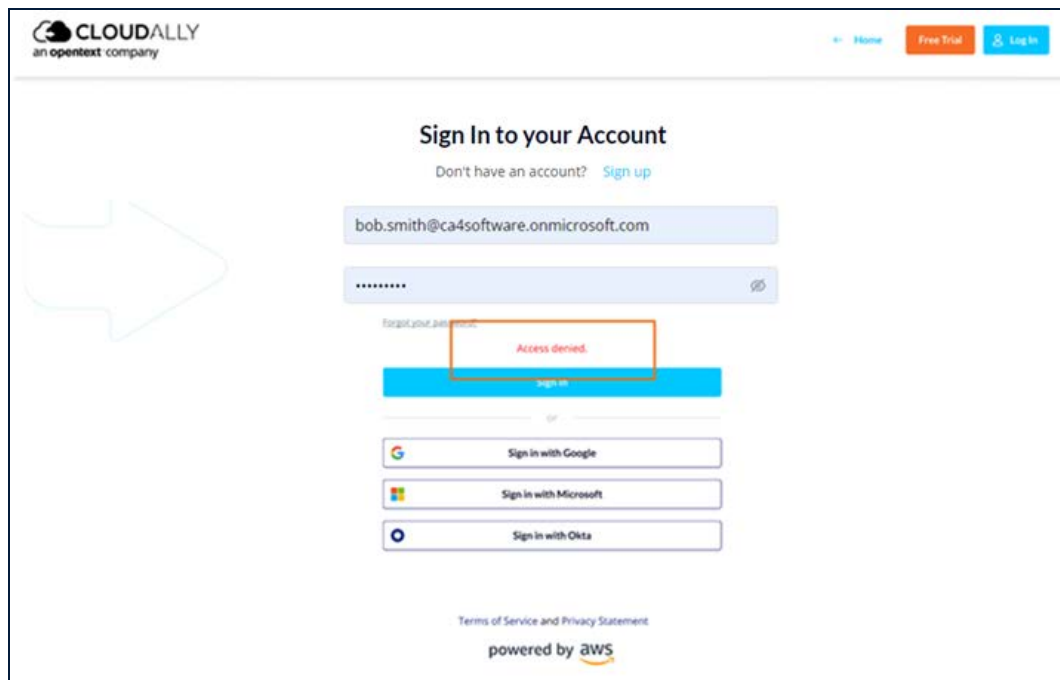
You can edit your list of addresses by clicking the pencil icon, or delete ones that you no longer want on your trusted list by clicking the trash icon.

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:

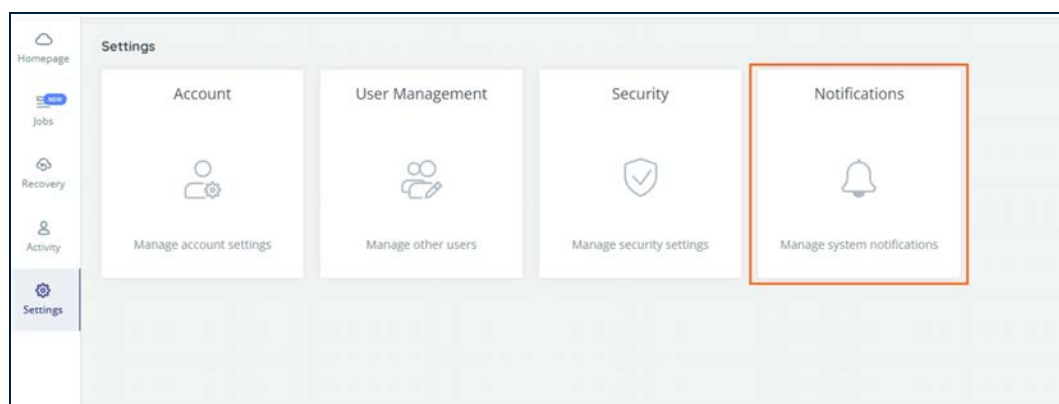


7.4.5 Email Notifications

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:

Settings
Settings > Notifications

Summary Report ☒

Report Format:

☒ Backup tasks overview [Preview](#)

☐ Backup failure details [Preview](#)

Report Frequency:
Once A Day

Provide as:

☐ CSV Attachment

☒ Download Link

☐ Send the report only in case of backup failure

SAVE

Send Notifications To: [+ Add new recipient](#)

Email	Display Name	Summary Report	Recovery Notification	Exceptions Notification	Auto Discovery Notification	Smart Alerts	Action
Bob.smith@CA4software-onmicrosoft.com	Bob Smith	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit Delete

Page 1 of 1
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.

Settings
Settings > Notifications > New Email report

User Info

Email Display Name

Notifications

☐ Summary Report ☐ Recovery Notification ☐ Exceptions Notification ☐ Auto Discovery Notification ☐ Smart Alerts

Save Cancel

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.

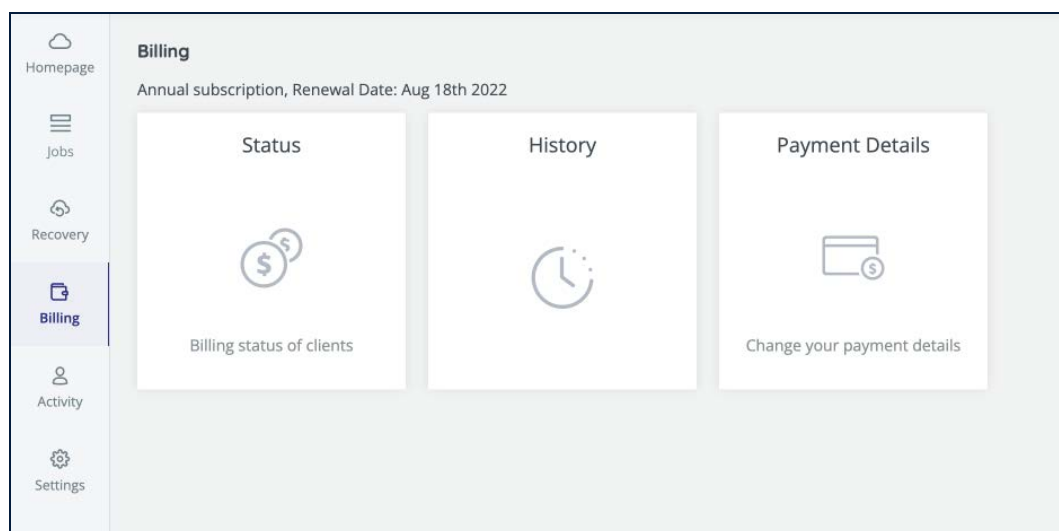


Should you fail to make your annual payment, you will be reminded with a message like this:



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' section with a sub-header 'Billing > Payment'. Below this is the 'Credit Card Details' section, which includes a 'Card Number' dropdown menu showing 'CREDIT: XXXX-XXXX-XXXX-1111 (12/2023)'. To the right of this section are three buttons: 'ADD NEW CARD', 'ACTIVATE CARD', and 'Delete card'. Below the 'Credit Card Details' section is the 'Billing Details' section, which contains various input fields for customer information, including 'Currency' (set to EUR), 'First Name' (Bob), 'Last Name' (Smith), 'Billing Email' (bob.smith@ca4software.onmicrosoft.com), 'Company Name' (12345), 'Address Line 1' (123 Main Street), 'Country' (United Kingdom), 'City' (Anytown), 'Phone number' (2011234567), 'Payment Day' (5), 'Title' (Mr), 'Company Tax Id' (12345), 'Address Line 3', 'State', 'Zip Code/Postal Code' (12345), and 'Email Invoice/Receipt' (with radio buttons for 'Link' and 'Attachment'). At the bottom right of the 'Billing Details' section is an 'UPDATE BILLING DETAILS' button.

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' section with a sub-header 'Billing >> Payment details'. Below this is the text 'Monthly subscription, next payment: Dec 13th 2020'. The 'Credit Card Details' section is expanded, showing a 'Card Number' dropdown menu with the text 'undefined: XXXX-XXXX-XXXX-444...'. To the right of this section are three buttons: 'ADD NEW CARD', 'ACTIVATE CARD', and 'Delete card'. Below the 'Credit Card Details' section is the 'Add new card details' section, which contains input fields for 'Card Holder's Name' and 'Card Number'. The 'Card Number' field is a masked input with a blue square icon and the text 'Card Number', followed by 'MM / YY' and 'CVV'. At the bottom right of the 'Add new card details' section is an '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.

Billing
Billing >> Payment details
Monthly subscription, next payment: Dec 7th 2020

▼ Credit Card Details

Card Number: CREDIT: XXXX-XXXX-XXXX-5048 (12/2025)
CREDIT: XXXX-XXXX-XXXX-5048 (12/2025)
CREDIT: XXXX-XXXX-XXXX-1111 (12/2023)

ADD NEW CARD **ACTIVATE CARD** Delete card

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

* First Name:

* Billing Email:

* Company Name:

Address Line 2:

* Country:

* City:

* Phone number:

Title:

* Last Name:

Company Tax Id:

* Address Line 1:

Address Line 3:

State:

* Zip Code/Postal Code:

Email Invoice/Receipt:

☐ Link

☒ 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**.

The screenshot shows the 'Billing' section of the Salesforce interface. The left sidebar contains navigation links: Homepage, Jobs, Recovery, Billing (selected), Activity, Settings, and Support. The main content area is titled 'Billing > AnnualSubscription' and shows 'Annual subscription, Renewal Date: Oct 19th 2023'. Below this, there are two sections: 'Billing Details' and 'Billing contact'. The 'Billing Details' section contains fields for Subscription Starting Date (November 3, 2022), Currency (USD), Country (United States), State (New York), City (New York), Zip Code/Postal Code (61234), Company Name (Pizza Perfecto), Company Tax Id (987654321), Company Address (14652 Broadway), and Purchase Order Number (Optional) (4350123). The 'Billing contact' section contains fields for First Name (Bob), Last Name (Smith), and Billing Email (Bob.smith@catsoftware.onmicrosoft.com). A 'Help' button is located in the bottom right corner of the form area.

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.

The screenshot shows the 'Billing > Status' page. At the top, there is 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 the note, there is a summary table with the following data:

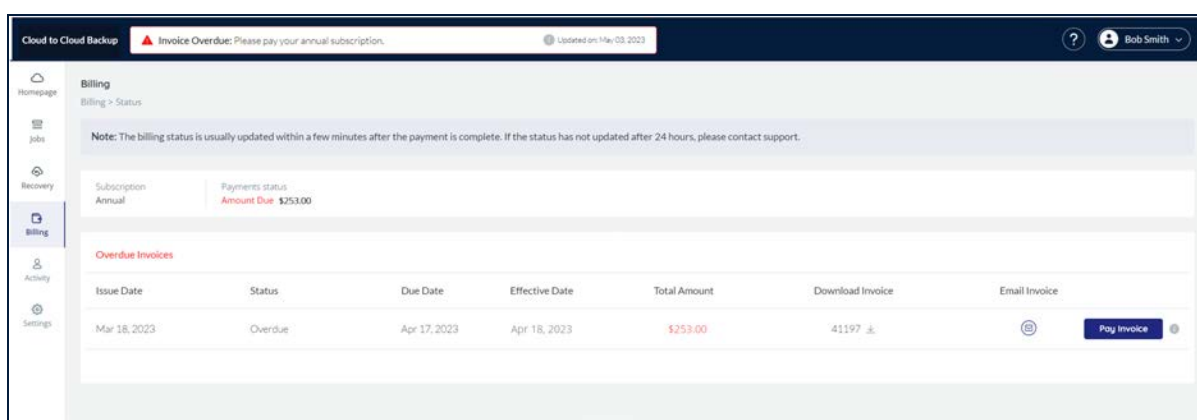
Subscription	Payments status	Next renewal date	Forecast for next payment
Annual	Paid	Sep 12, 2023	\$226.80

Below the summary table, there is a 'Payment Forecast' table with the following data:

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.



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:

Cloud-to-Cloud Backup

Choose payment method

Pay With 

On the Paypal page, you can also pay by credit, without the need for a user account

bob.smith@ca4software.com, 1 year backup starting September 28, 2022, HR MS 365 Bundle Plan - Comprehensive Microsoft 365 Backup Billed Per User

Buyer

bob.smith@ca4software.com

Due date

Apr 17, 2023

Total

\$1,890.00

morning by Green Invoice is not part of the interaction between the business and its customers, and is not liable for the goods & services offered by the business, and/or the business' use of the customer's credit cards.

Monthly

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

Cloud-to-Cloud Backup

Payment Failed: Unable to charge your credit card.

Updated on Nov 07, 2022

bob.smith@ca4software.onmicrosoft.com Bob Smith Log Out

Homepage

Billing

Jobs

Recovery

Billing

Activity

Settings

Billing

Billing > Status

Note: The billing status is updated once a day. If you made any recent payments it will be reflected in the next 24 hours.

Subscription

Monthly

Payments status

Amount Due \$51.52

Update credit card details





Unpaid Bills

Issue Date	Due Date	Effective Date	Total Amount
Jun 20, 2022	Jun 20, 2022	Jul 1, 2022	\$12.88
May 20, 2022	May 20, 2022	Jun 1, 2022	\$12.88
Apr 20, 2022	Apr 20, 2022	Mar 1, 2022	\$12.88
Mar 20, 2022	Mar 20, 2022	Apr 1, 2022	\$12.88

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	\$48.40
66837 	August 13, 2020	August 15, 2020	\$44.65
Page 1 of 1			Showing 1-4 of 4

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

Pizza Perfecto Ltd
18 Mozarella Lane
United Kingdom ID 307 123 08

Backup Service, Inc.

Tax ID: 5145966667
123 Commerce Lane
Anytown, USA 12345

www.backupservice.com

Invoice / Receipt 51646

Certified Copy

26 April 2023

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: *Joseph Mozarella*

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.

The screenshot shows the Salesforce Settings page for User Management. The left sidebar contains navigation links: Homepage, Jobs, Recovery, Billing, Activity, and Settings (highlighted). The main content area is titled 'Settings' and 'Settings > User Management > New user'. It includes fields for Email (bob.smith@ca4software.onmicrosoft.com), Password (masked), Type (Email), and Role (Custom). Below these fields are two sections: 'Operations' and 'Services'. The 'Operations' section has a 'General' subsection with several checkboxes, including 'View billing notification messages' which is checked. The 'Services' section has an 'All' subsection with checkboxes for various services like Microsoft Exchange, Microsoft Groups / Teams, Microsoft SharePoint, Microsoft OneDrive, Google Account, Salesforce, Dropbox Business, Box, Google Workspace, Google Shared Drives, and IMAP.