User Guide

Salesforce Backup & Recovery

salesforce

SF UG WL-CE 24.4.1

Table of Contents

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
- Compliance
- 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

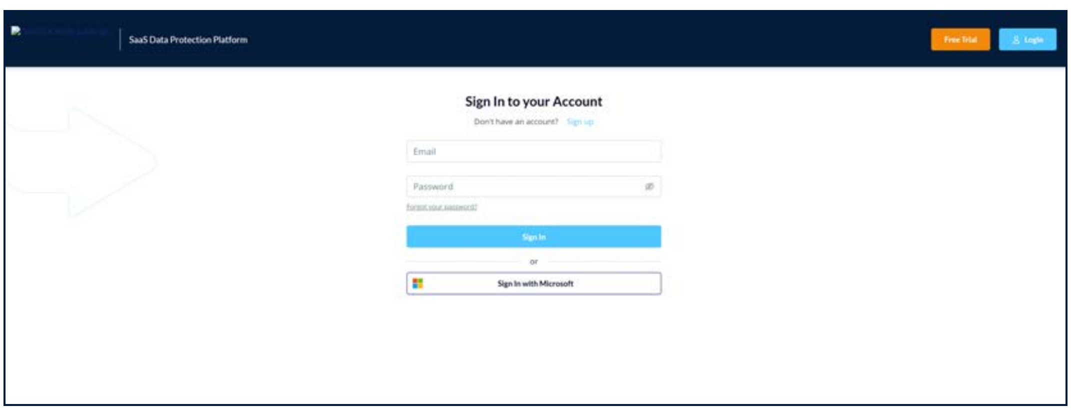
2.1 Prerequisites

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

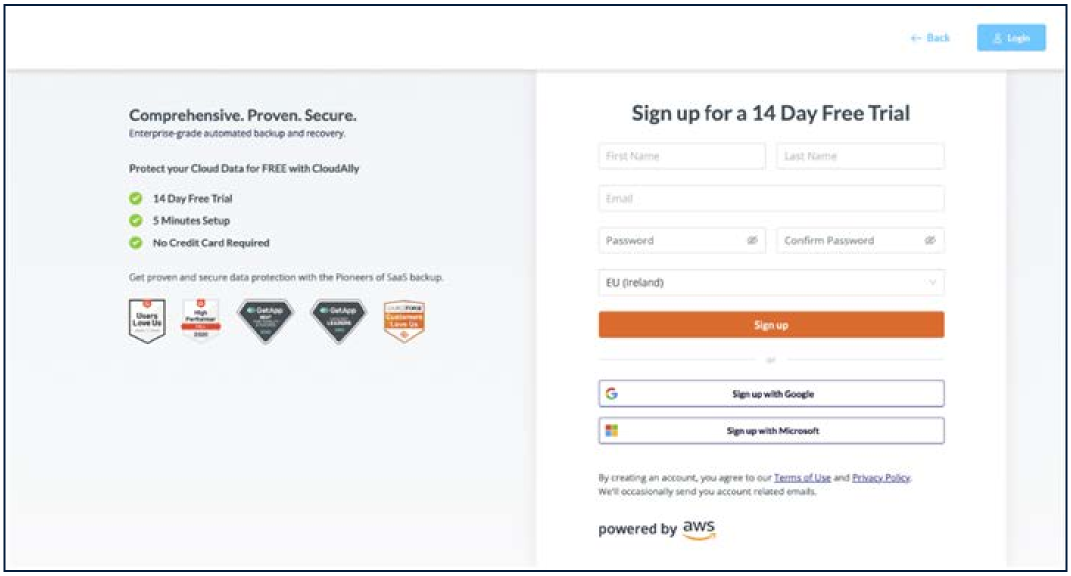
- Salesforce Subscription. Not all editions of Salesforce support API access required for our backup to operate. The following editions support the API access: Enterprise Edition, Unlimited Edition, Developer Edition, Performance Edition, and Salesforce Essentials Edition.
- Salesforce account with API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



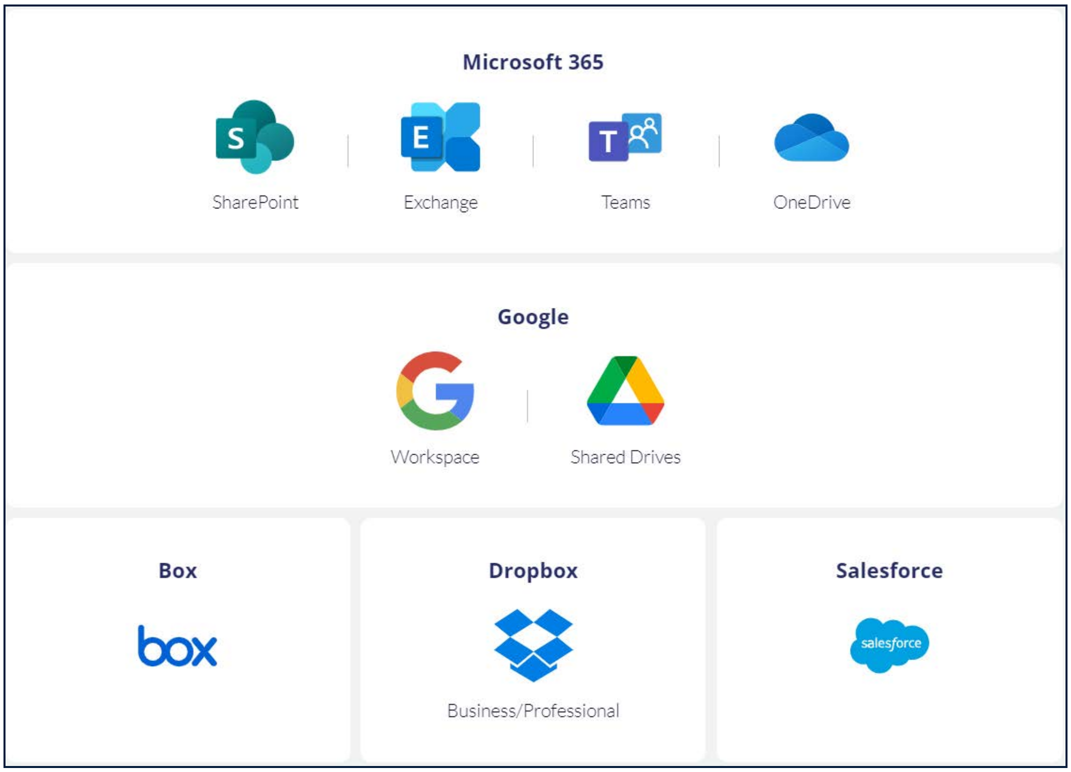
4. Complete the form, and then click Sign up.

> **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, South Africa, India, 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.

> **Note:** You can also enable Two-Factor authentication to provide additional security. For more information, see Managing Your Account .

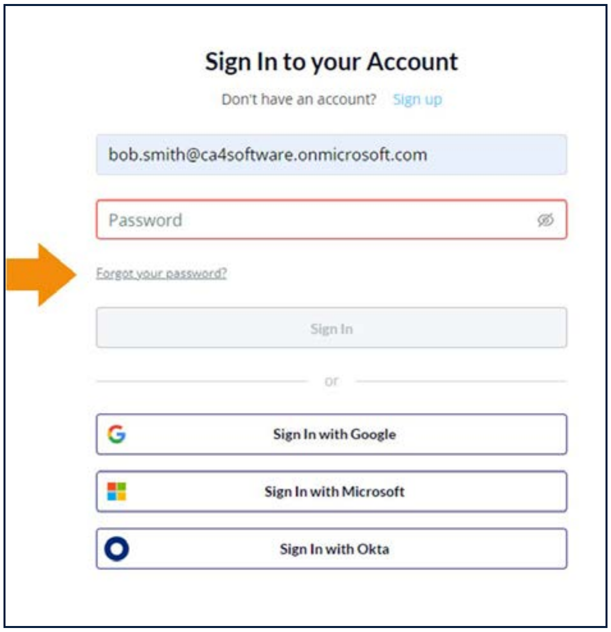
7. After you log in, you will see the following screen, enabling you to begin creating your backup tasks:



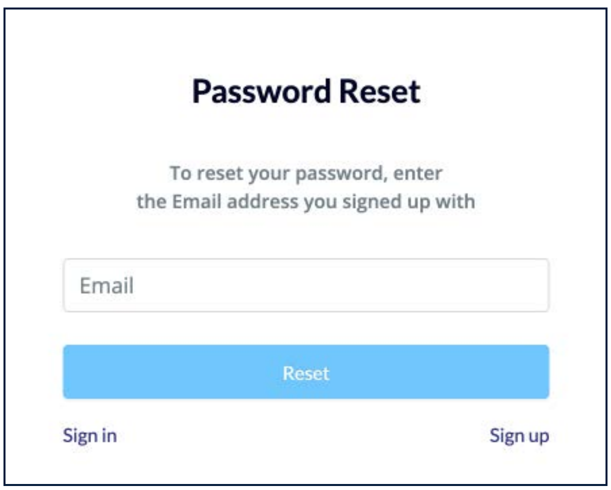
2.3 Resetting Your Password

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

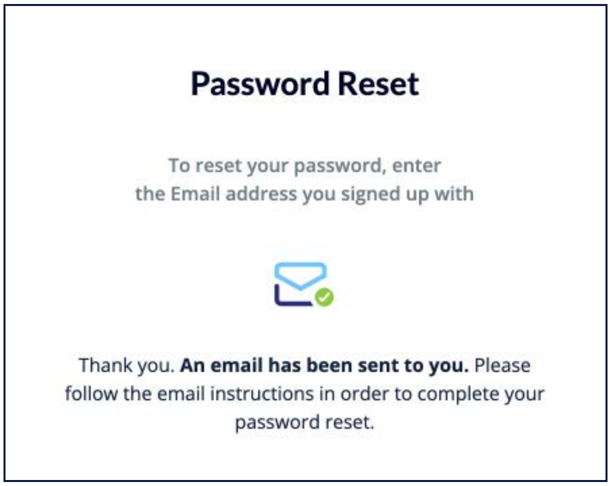
1. On the sign-in page, click **Forgot your password?** to start the process of resetting your password.



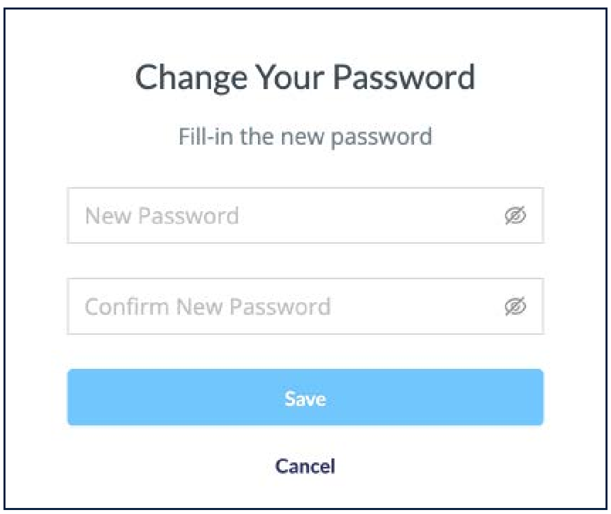
2. The *Password Reset* page will appear.



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



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



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

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

3 Backing Up Your Salesforce Data

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

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

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

3.1 Creating a New Backup Task

Pre-requisite: Enabling API Access

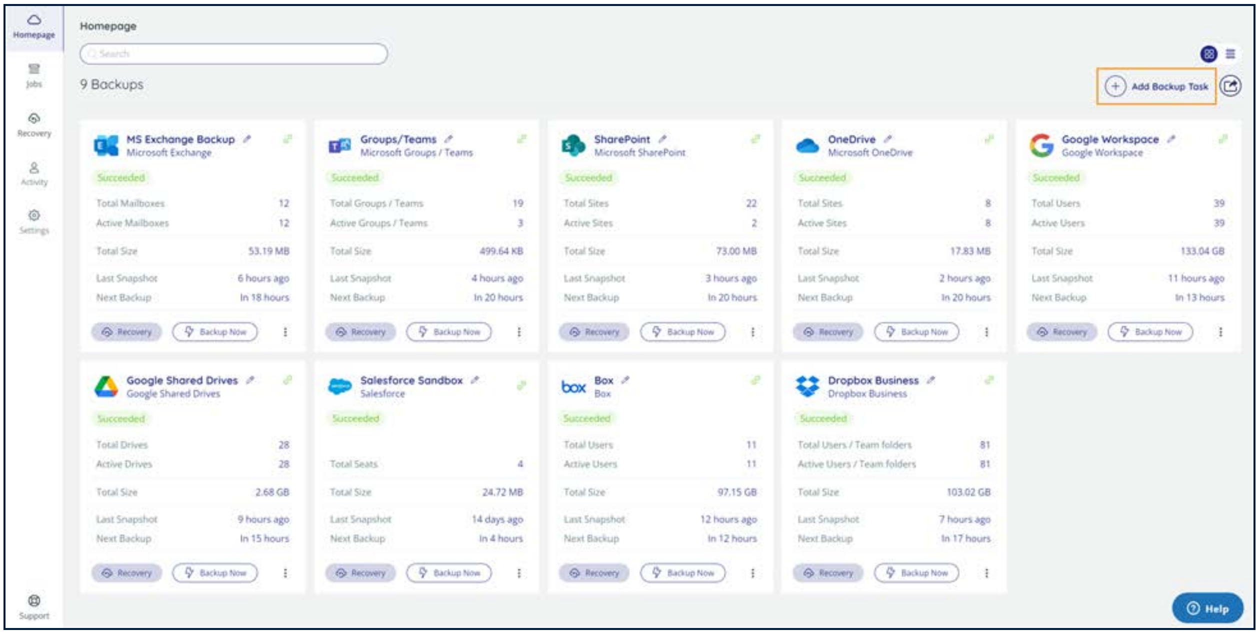
Before our backup service can access your Salesforce account, you need to enable API access in your Salesforce user profile:

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

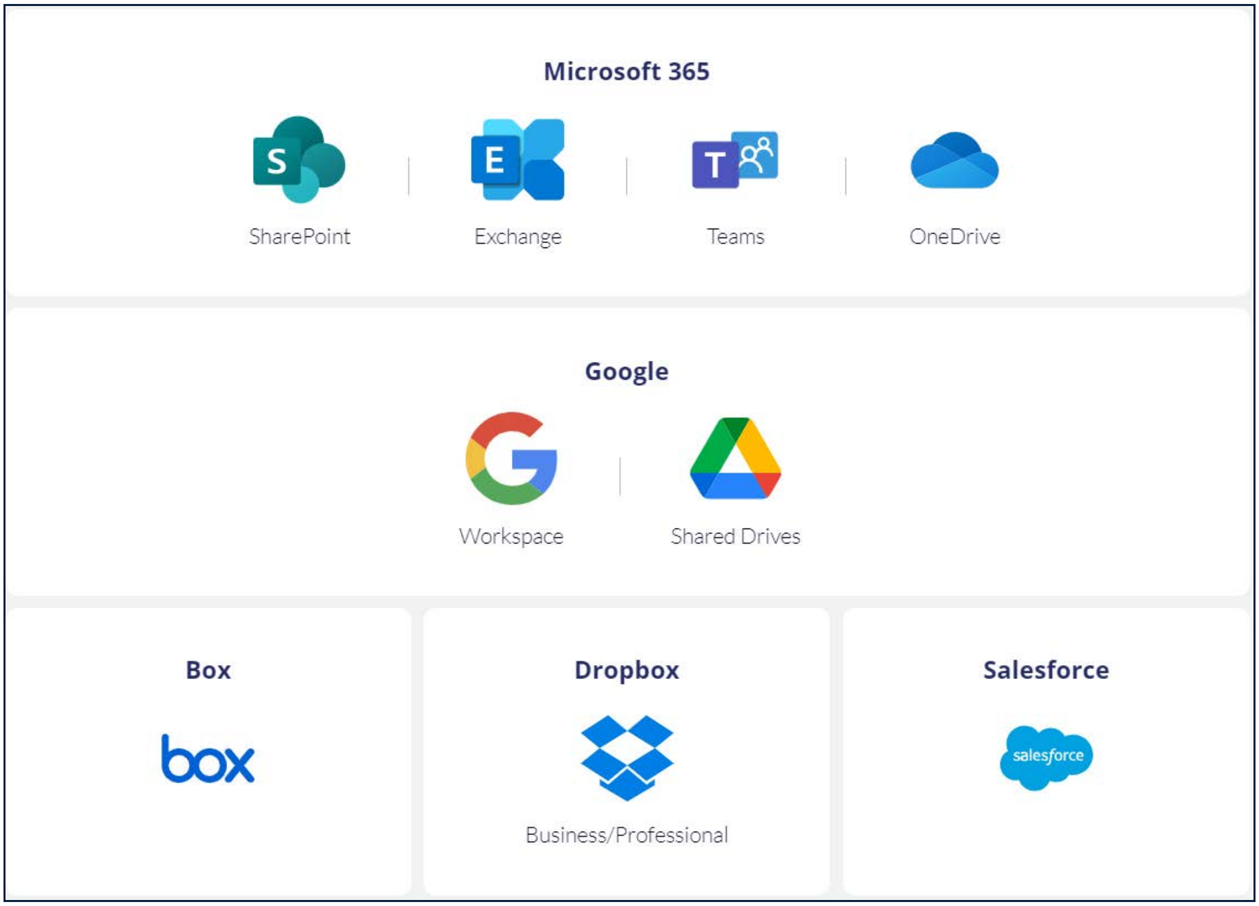
To create a new backup task:

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

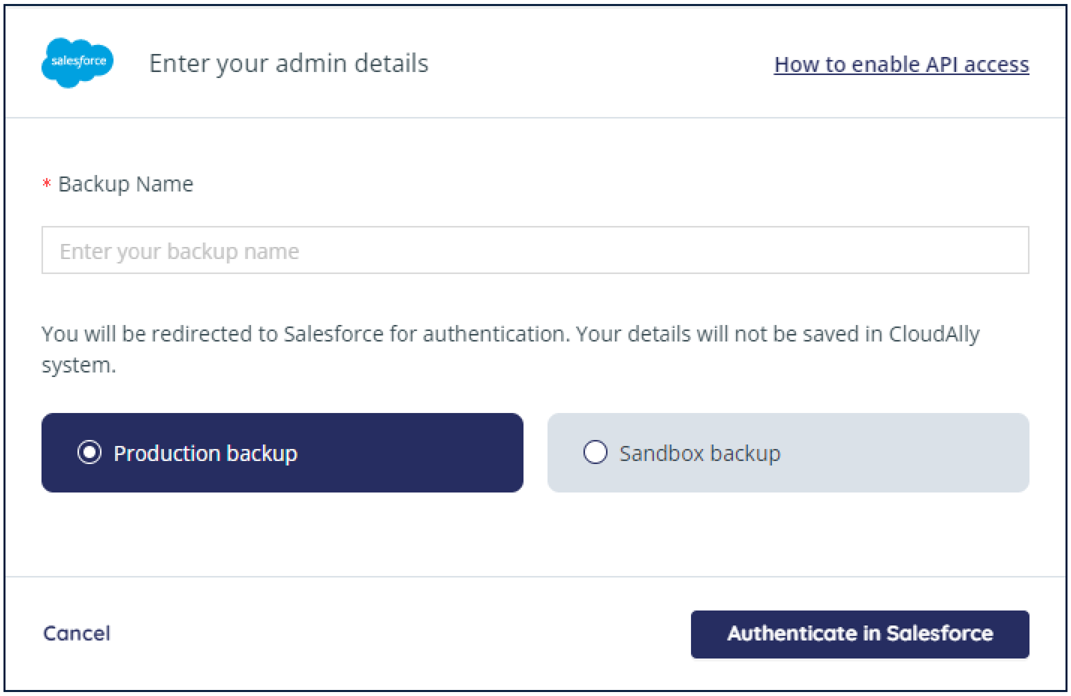
2. On the Homepage, click **+ Add Backup Task**.



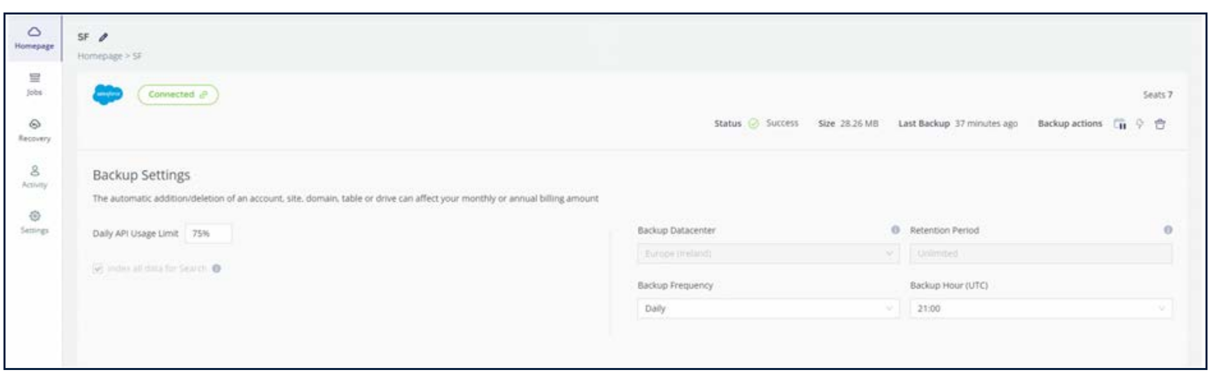
The following page is displayed:



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



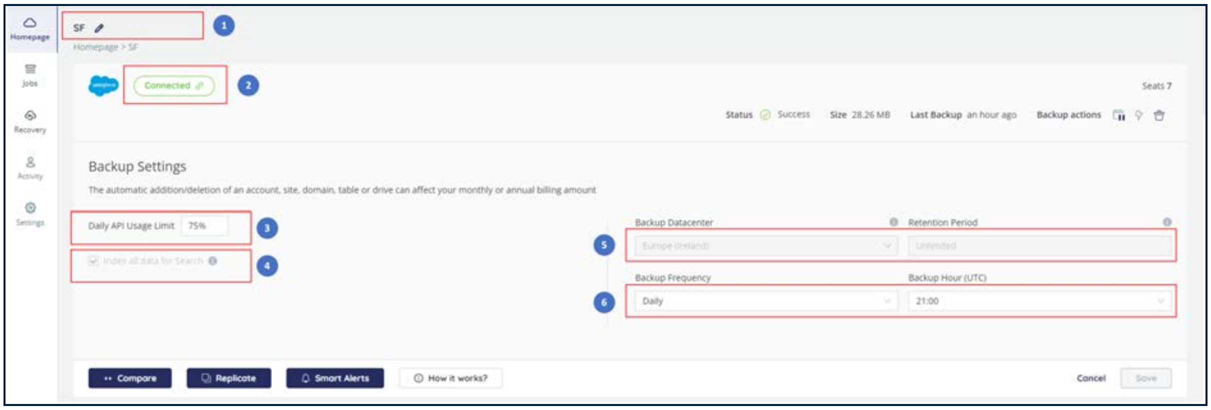
4. Fill in the name of the backup task. This name is used in the notifications and reports, and it can be changed later.
5. Select whether you'd like to back up your **Production** or **Sandbox** account. This option cannot be changed later.
6. Click **Authenticate in Salesforce**. You will be redirected 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.



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
      iv. 3 times a day

   b. Click the drop-down list adjacent to the **Backup Hour (UTC)** field and select the backup hour. Click **Save**.

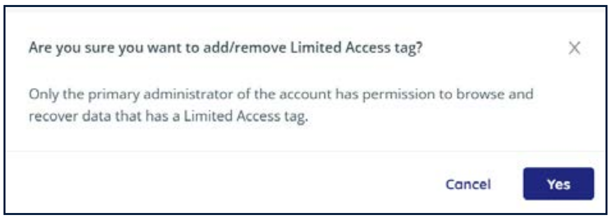
> **Note:** 3x daily backups might be subject to additional charges. Please contact support or your sales representative if you have any questions before changing the backup frequency.

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."



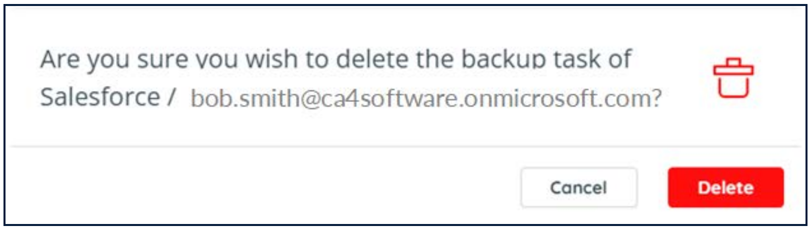
3.3 Deleting a Backup

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 Deleting 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.



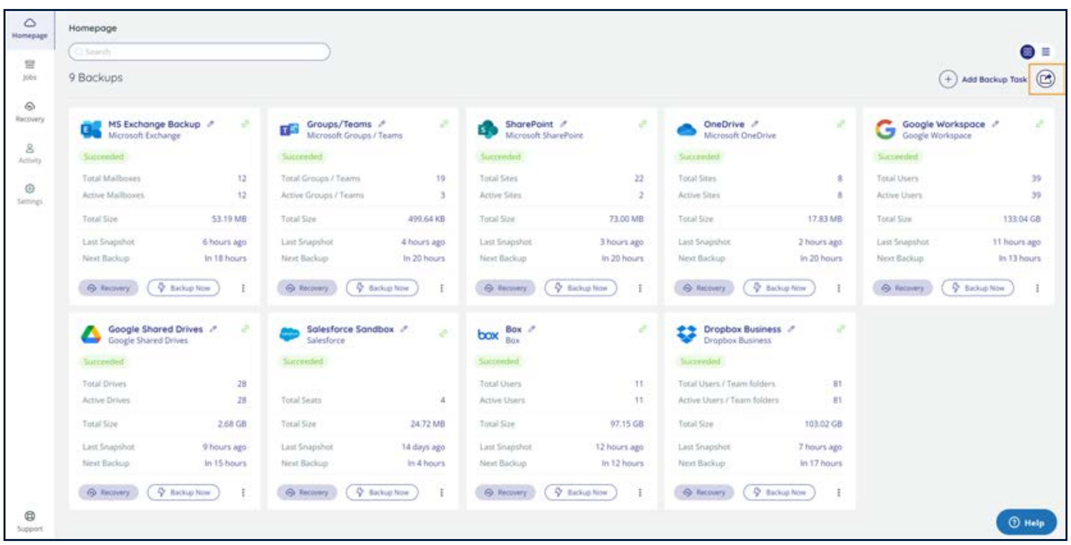
Click **Delete**. The selected backup service is removed from your account.

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 objects 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).

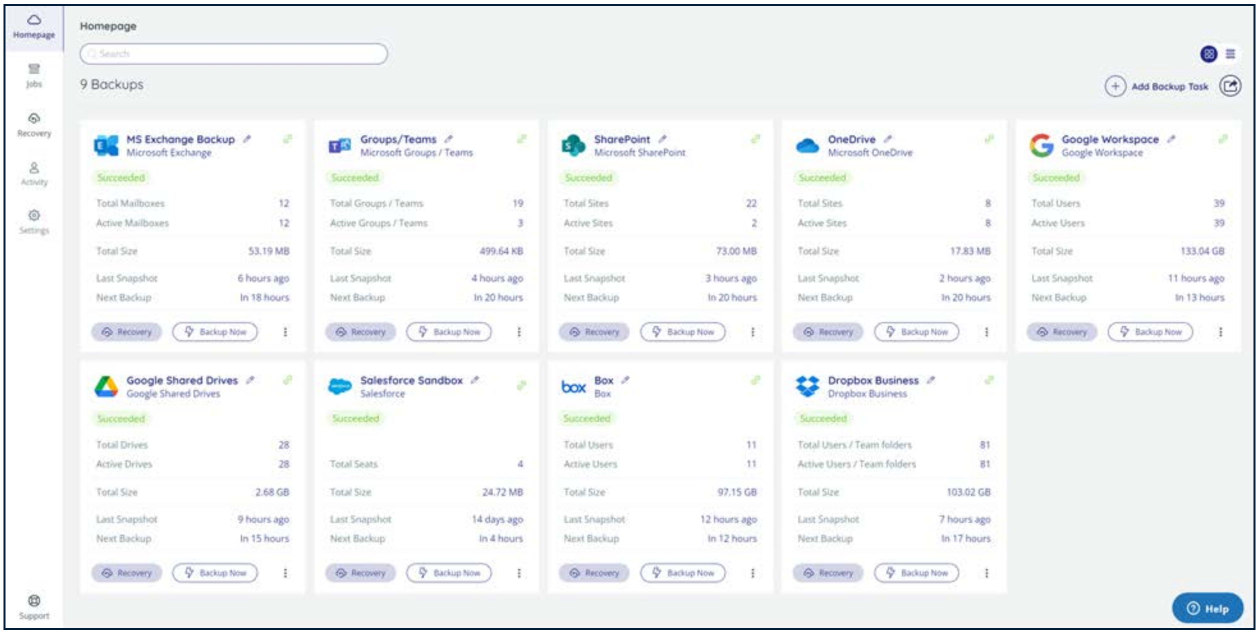
To export a usage report, click the **Export** button, next to **Add Backup Task**. The report will be sent to you via email.



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.]

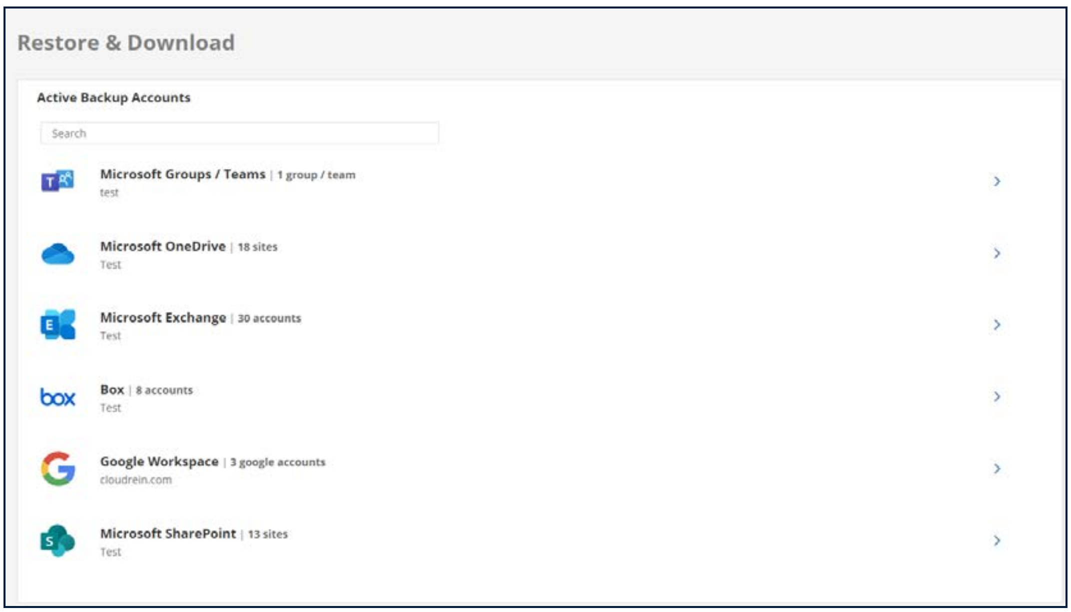
4 Recovering Your Backed Up Data

4.1 Using the Recovery Menu

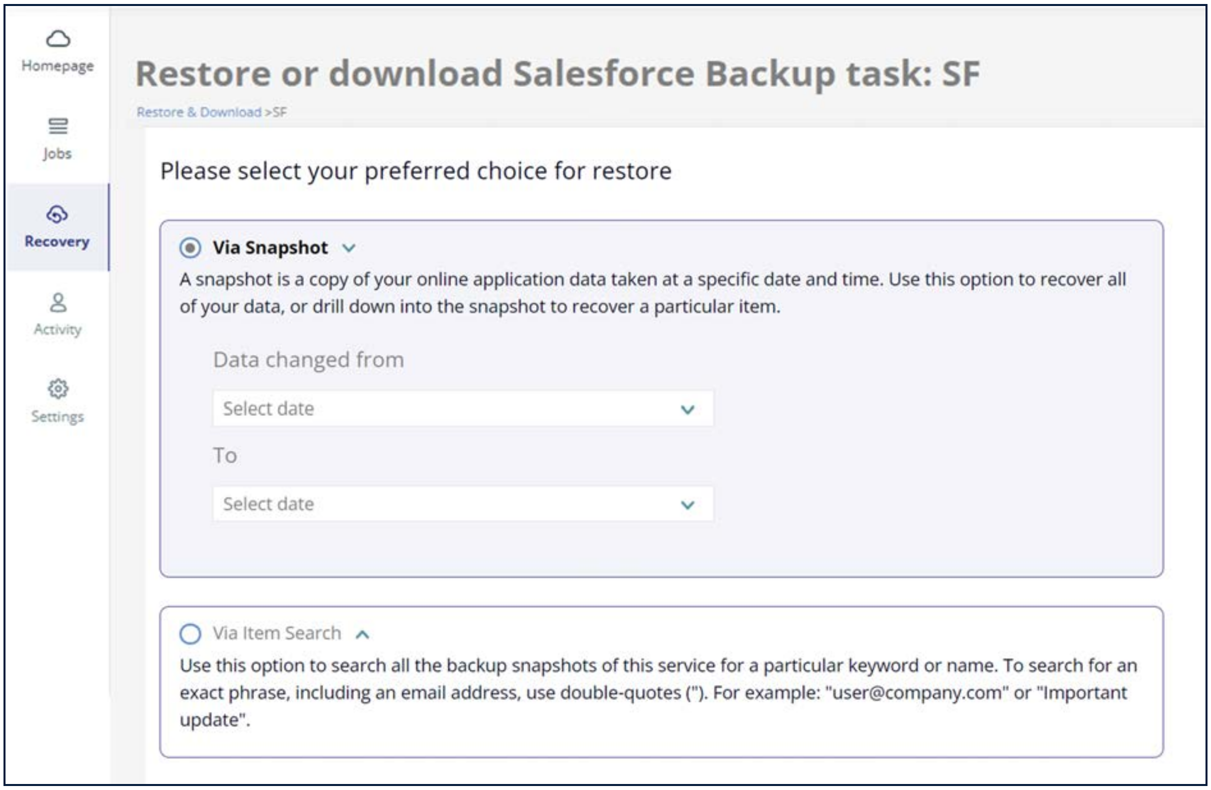
The Recovery Menu provides you with options at a fine granularity for selecting which object to restore or export.

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.



- 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. Once you select an item, the **Restore** and **Download** buttons become available.
4. Alternatively, you can click the magnifying glass in the Action column to drill down into the snapshot and select one or more data/metadata items to recover.

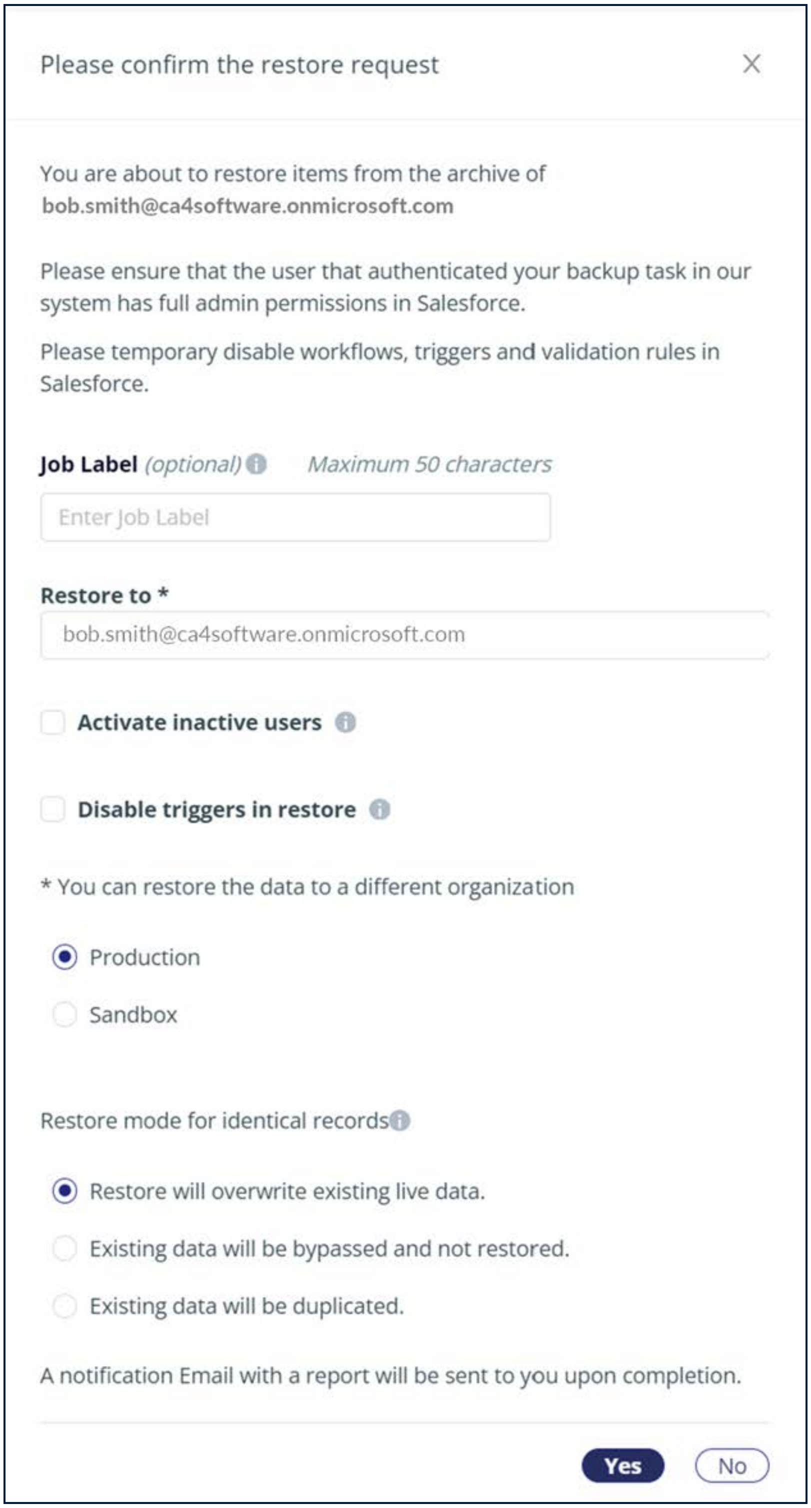
5. Once you select an item, the **Action** menu becomes available. Choose either **Export**or **Restore**.

4.1.1.1 Restore

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

- You can add an optional 50-character Job Label to differentiate it from other Exports and Restores on the Jobs page.
- Which account would you like to restore the data to? You can restore the data to a different Salesforce instance.
- Do you want to:
  - **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 available account types:
  - Production
  - Sandbox
- During the restore process, we compare the records in the existing objects with the records being restored using the unique fields (except for the automatically generated id). Choose one of the three available restore modes for identical records:
  - **Overwrite**: The restored records will be located in the same place as the existing records. Deleted objects and records will be restored from the snapshot. Existing identical records will be overwritten.
  - **Use this option:** to restore or repair deleted / modified data.
  - **Bypass**: The restored records will be located in the same place as the existing records. Deleted objects and records will be restored from the snapshot. Existing identical records will be skipped.
  - **Use this option**: to restore deleted data.

- **Duplicate**: The restored records will be duplicated in the same location as the existing records, 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 objects and records will be restored from the snapshot.
- **Use this option**: to compare both versions of each item, to ensure the correct version is preserved.

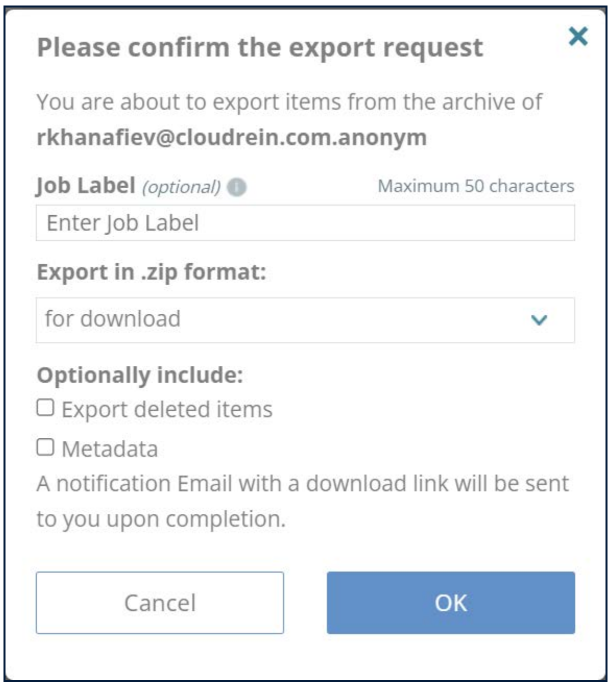


The backup data that you selected will be restored to the location that you specified. When the recovery process is complete, a summary will be sent to your email.

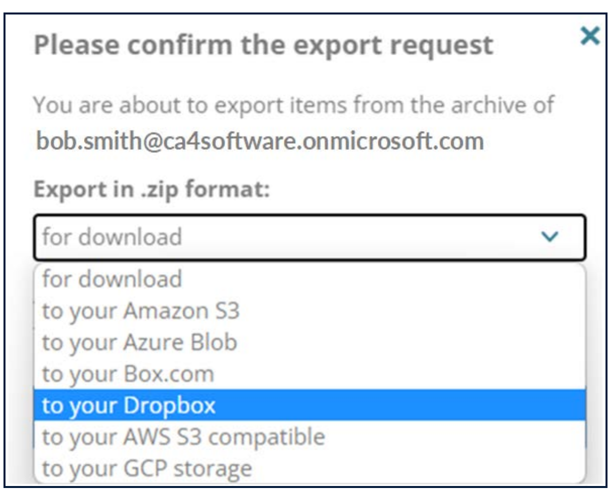
You can also check the Jobs page to see the progress of your task. See "Tracking Recovery Tasks on the Jobs Page."

4.1.1.2 Export/Download

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



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



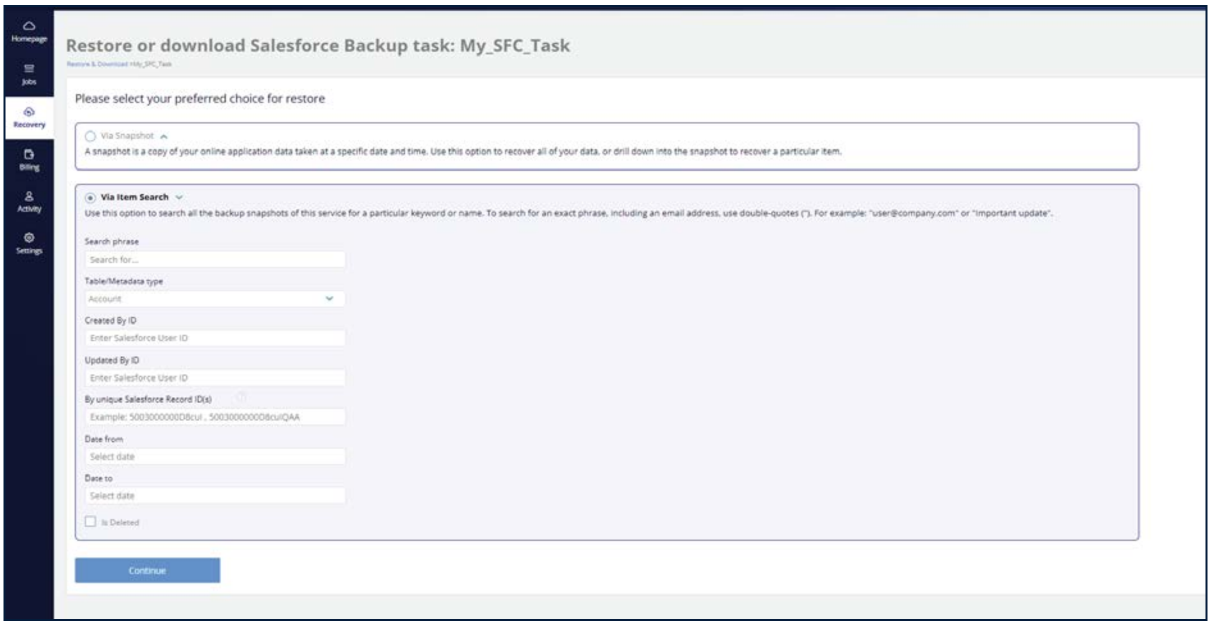
3. If you select options other than “for download,” you may be asked for additional credentials and/or access tokens for the selected storage locations.
4. You may optionally include:
    a. Deleted items
    b. Metadata: : If you want your to include information about the fields, configurations, code, logic, and page, etc.
5. Click **OK**. The download instructions are sent to your registered email address. The download link is only valid for 72 hours.
6. Or, you can check the *Jobs* page. (See "Tracking Recovery Tasks on the Jobs Page.") When the task is completed, the **Download Results** button will be active.

4.1.2 Restore or Download Via Item Search

1. Select **Via Item Search**, and enter a word or phrase to search on.
2. Or search using any of the following fields:
    a. **Table/Metadata type**: Enter the name of the table from which the data has to be retrieved, or the name of the metadata field.
    b. **Created by ID:** Enter a term that matches part of the user’s ID
    c. **Updated by ID**: Enter a term that matches part of the user's ID

   d. **By unique Salesforce Record ID(s)**
   e. **Date from / Data to**: Enter the date range that you would like to restore.

3. **Is Deleted:** Select the check box adjacent to this field if you want to include deleted items in your search.



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

4.2 Tracking Recovery Tasks on the Jobs Page

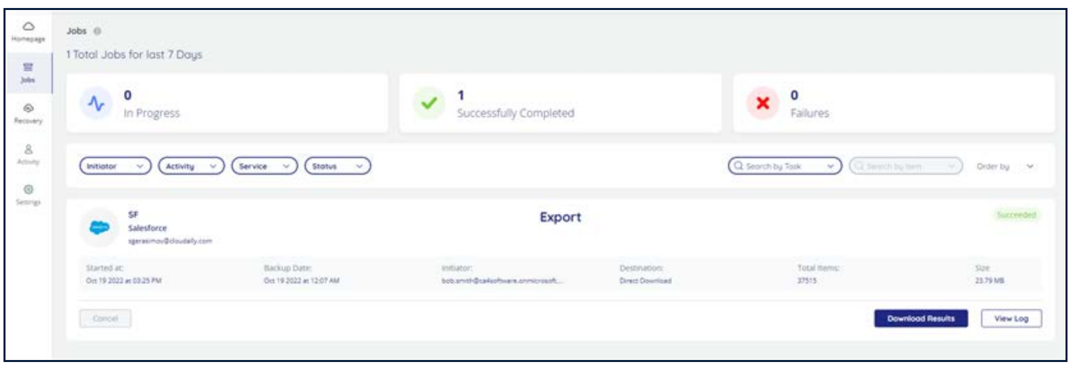
The Jobs page provides you with both high-level and drill-down views of your restore and export jobs over the last seven days.

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

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

4.2.1 High-Level Summary

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



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

4.2.2 Filtering

The next section allows you to filter by numerous criteria:

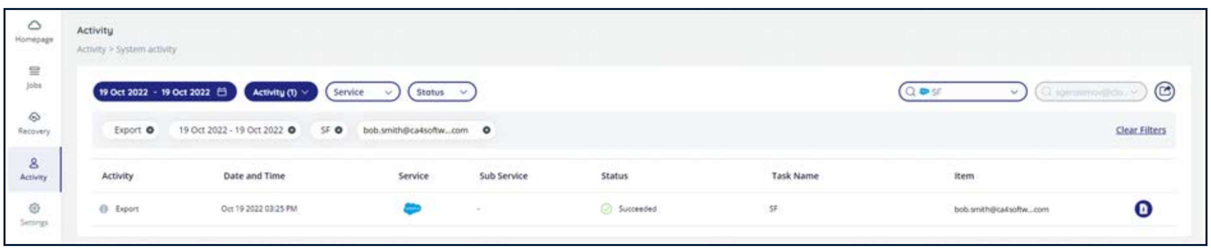
- **Initiator:** Who initiated the backup / restore?
- **Activity**: Filter by restores or exports.
- **Service**: Filter by one of the following services, such as:
  - Google Workspace
  - Google Shared Drives
  - Salesforce
  - Box
  - Dropbox
  - Google Account
- **Status**: Filter by one of the following:
  - In progress
  - Succeeded
  - Partially succeeded
  - Failed
  - Pending
  - Canceled
- **Search by Task**: Filter by a task, such as:
  - Box
  - Dropbox
  - Google Workspace
  - Salesforce

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

- Latest First
- Oldest First

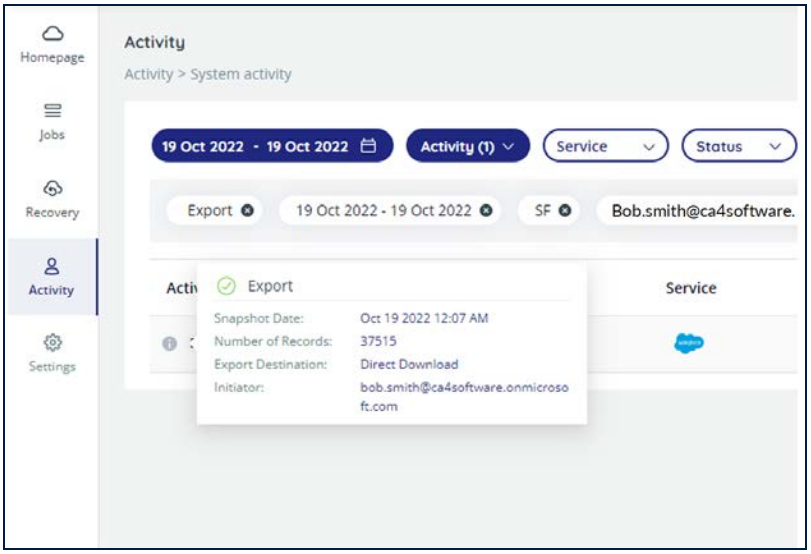
4.2.3 Description of Each Job

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



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

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

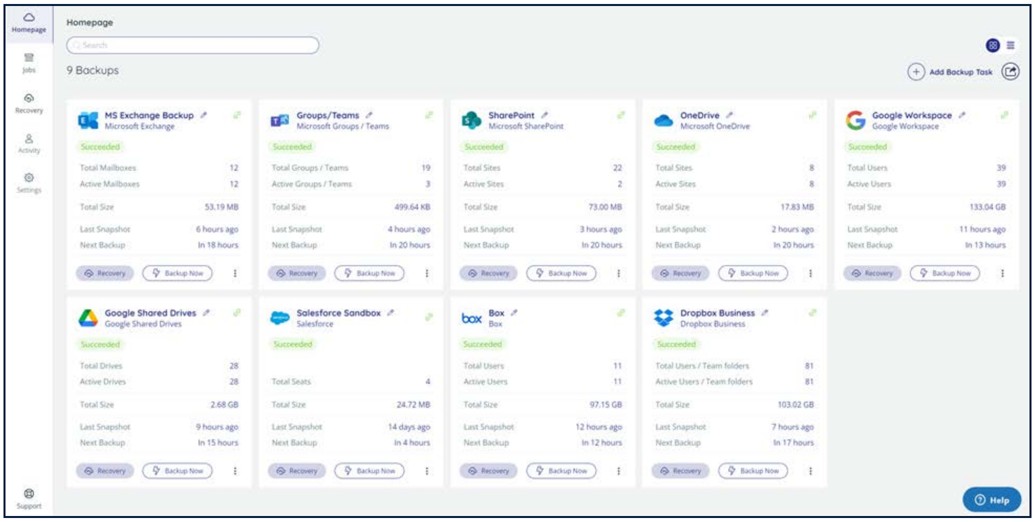

Homepage
Jobs
Recovery
Activity
Settings
Activity
Activity > System activity
19 Oct 2022 - 19 Oct 2022
Activity (1)
Service
Status
Export
19 Oct 2022 - 19 Oct 2022
SF
Bob.smith@ca4software.
Service
Export
Snapshot Date: Oct 19 2022 12:07 AM
Number of Records: 37515
Export Destination: Direct Download
Initiator: bob.smith@ca4software.onmicrosoft.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 object

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 objects 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 using the following options:

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

5.2 Viewing Backup Statistics with the Drill-down Feature

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

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

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

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

6 Comparing, Replicating, and Setting Smart Alerts

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

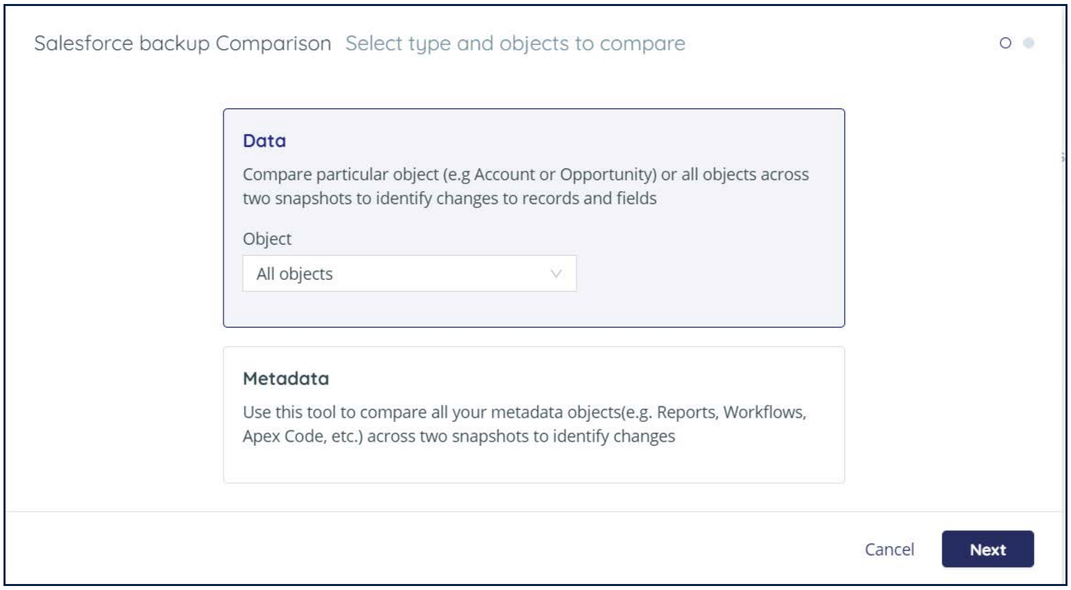
6.1 Compare

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

6.1.1 Initializing the Data Comparison

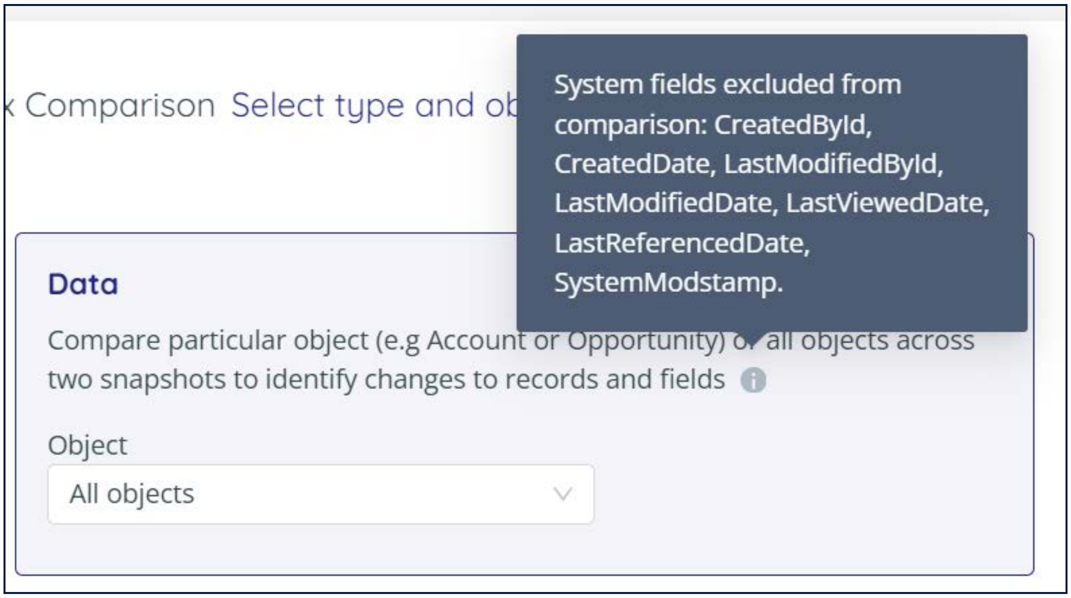
To initiate the comparison procedure, follow these steps:

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

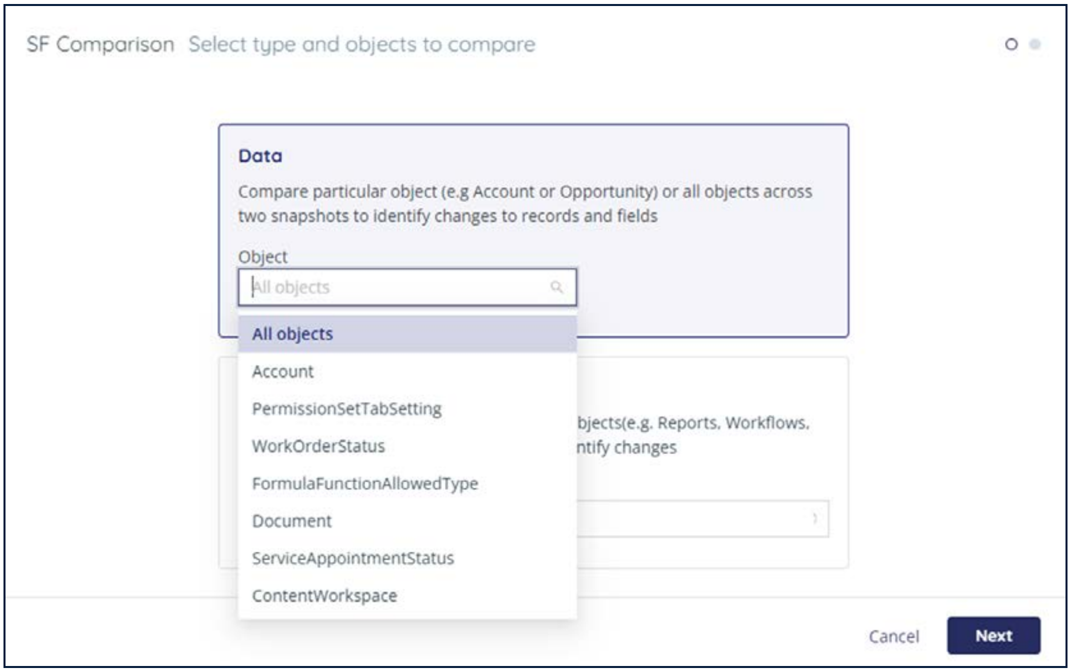


3. You can select which objects you want to compare. By default, all objects are compared during the operation.

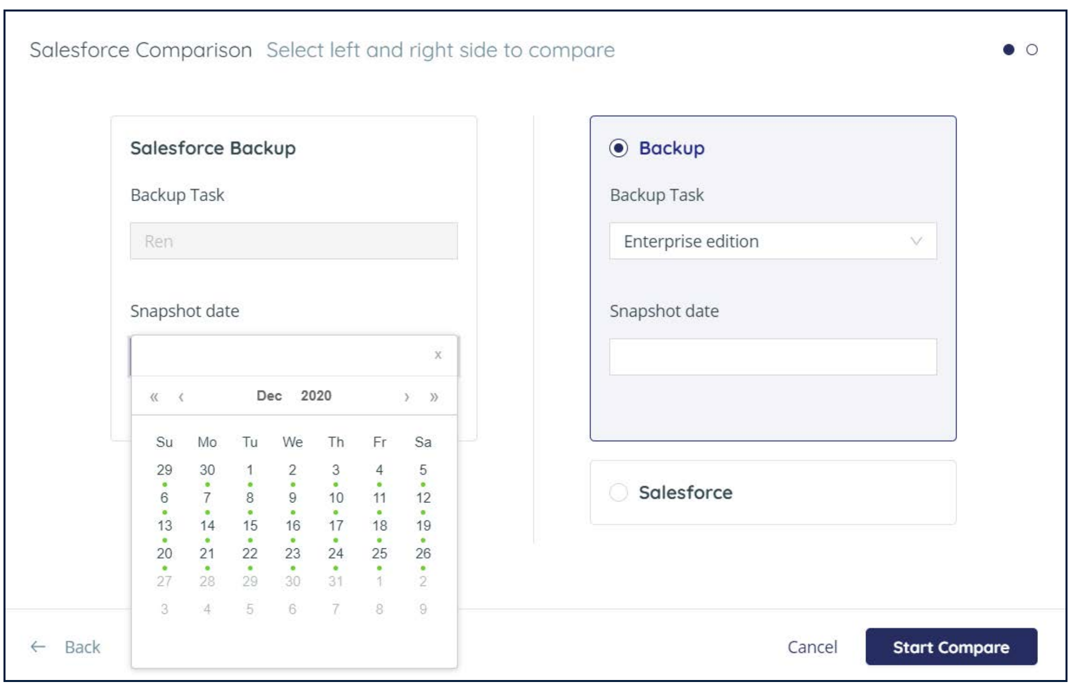
> **Note:** The following system fields are automatically excluded from comparison: CreatedById, CreatedDate, LastModifiedById, LastModifiedDate, LastViewedDate, LastReferencedDate, SystemModstamp.



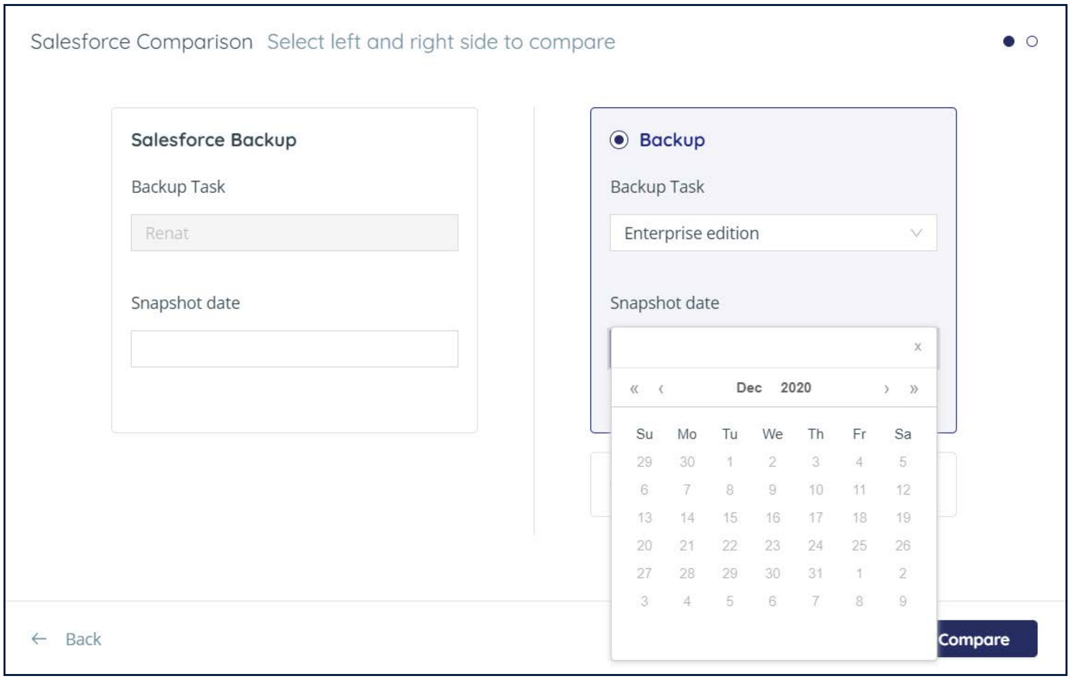
4. You can select an object from the drop-down menu:



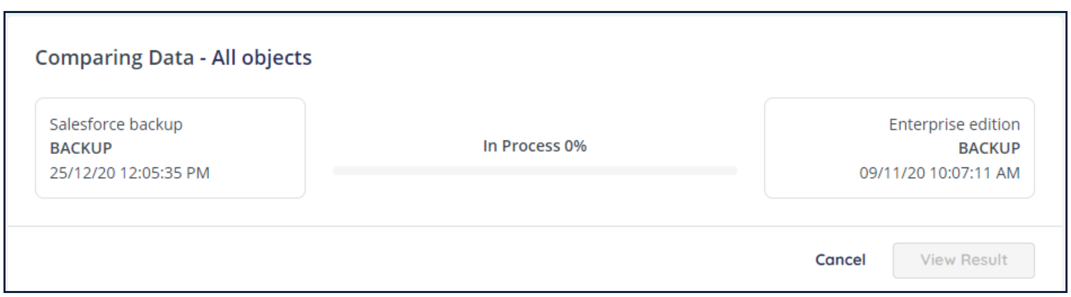
4. In the next step you are prompted to select the date of the sources of the data for the comparison:



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



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

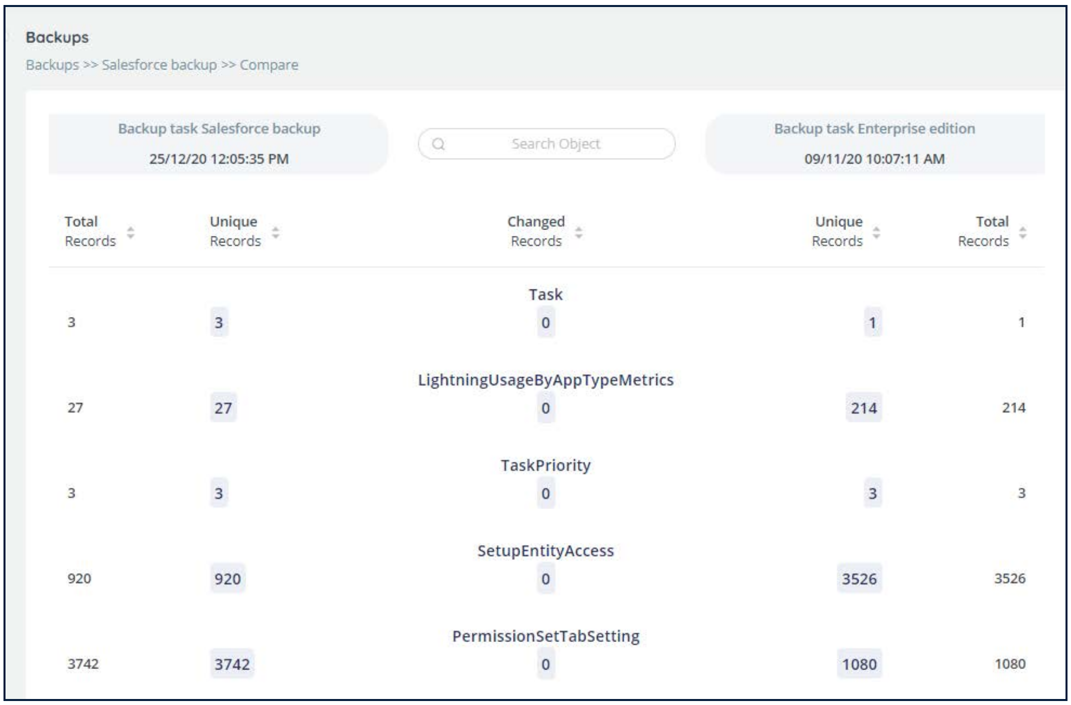


8. You can cancel the task with the **Cancel** button before it is finished.

6.1.2 Viewing the Data Comparison Results

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

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



		LightningToggleMetrics		
27	27	0	34	34
		LightningUsageByPageMetrics		
58	58	0	870	870
		ApexPageInfo		
1	0	1	0	1
		MatchingRule		
3	3	0	4	4
		ApexComponent		
3	3	0	20	20
		Test__c		
2	2	0	1	1
		Community		
1	1	0	1	1
		BusinessProcess		
1	1	0	5	5

The following 3 data object(s) had no changes

The following 40 data object(s) exist only in Backup task Renat - 25/12/20 12:05:35 PM

The following 49 data object(s) exist only in Backup task Enterprise edition - 09/11/20 10:07:11 AM

The results in this page are organized in a table displaying the Total number of records, the number of Unique records in each of the data sources, and the number of changed records in each of the objects found in the Salesforce database at the point of backups (or in the production database respectively).

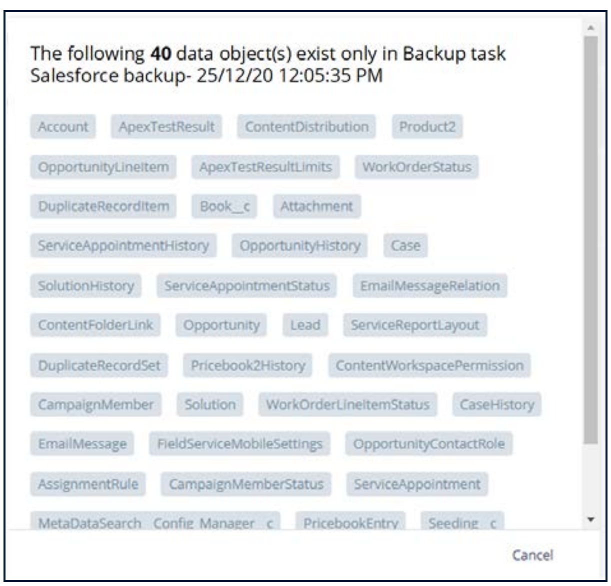
To find more details on the Unique or Changed elements, click the corresponding numbers in the table – they contain links to the "comma-separated values" (.csv) files containing detailed information on the unique or changed items in the corresponding object.

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

	A	B	C	D	E	F	G	H	I	J	K
1	Id	DurableId	Label	MasterLabel	NamespacePrefi	DeveloperName	LogoUrl	Description	UiType	NavType	UtilityBar
2	0000000000000	06m5J000000n7	Sales	salesforce	standard	Sales	/img/salesforce-r	The world's most popular sales	Aloha	Standard	
3	0000000000000	06m2X000001D	Sales	salesforce.com	standard	Sales	/img/salesforce-r	The world's most popular sales	Aloha	Standard	

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

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



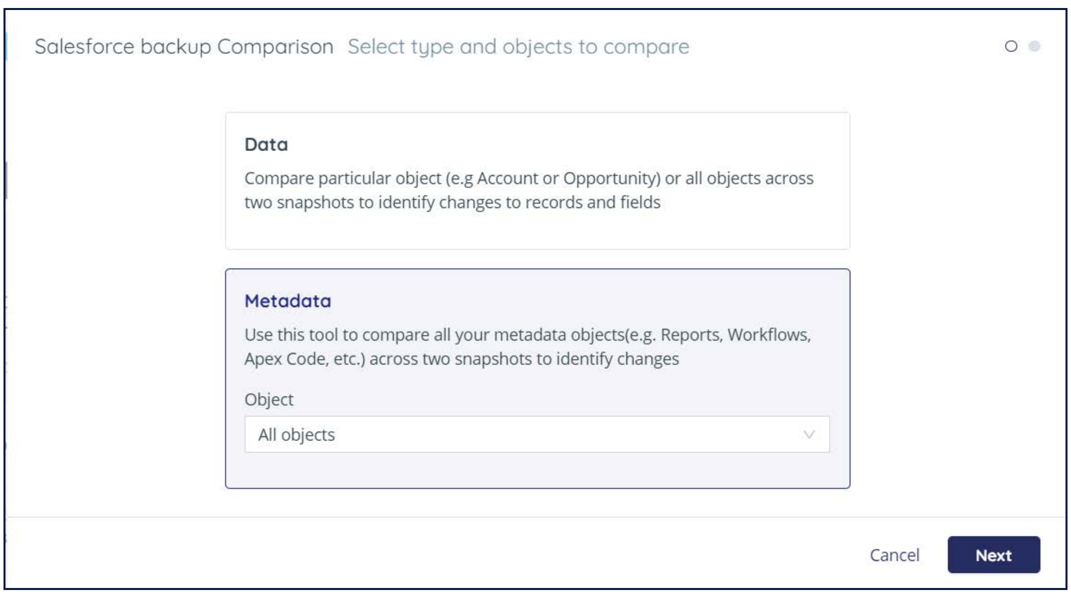
6.2 Comparing Metadata

6.2.1 Initializing the Metadata Comparison

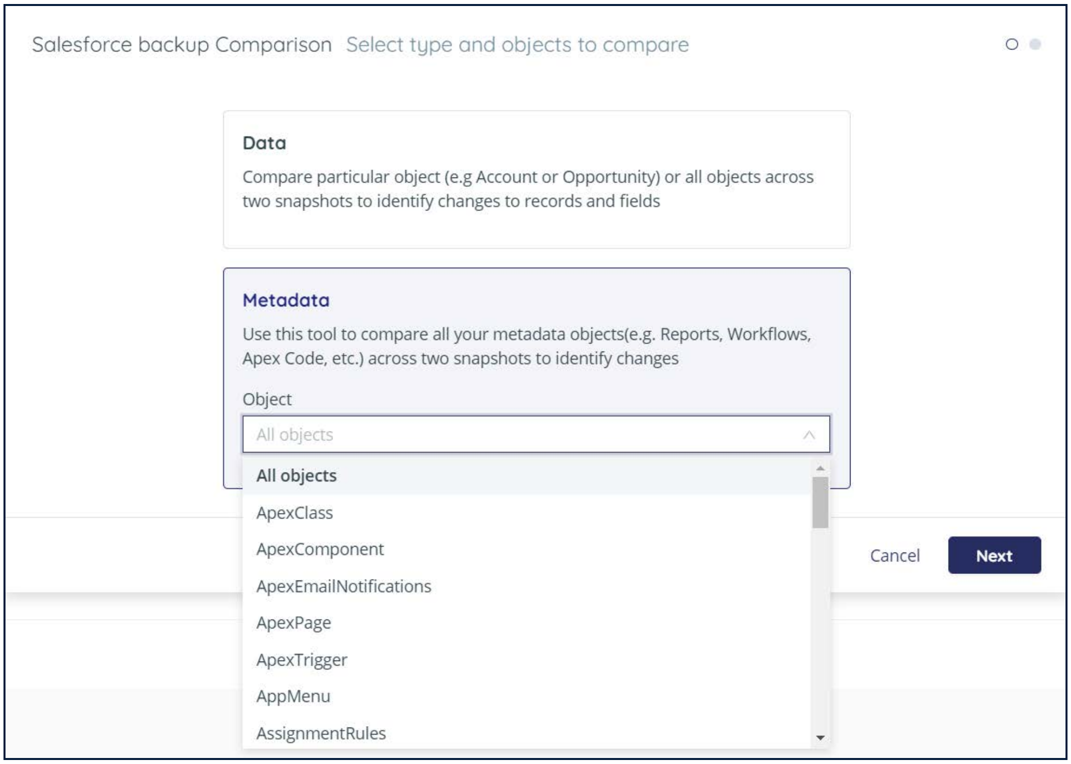
To initiate the metadata comparison procedure, follow these steps:

1. Click **Compare**.

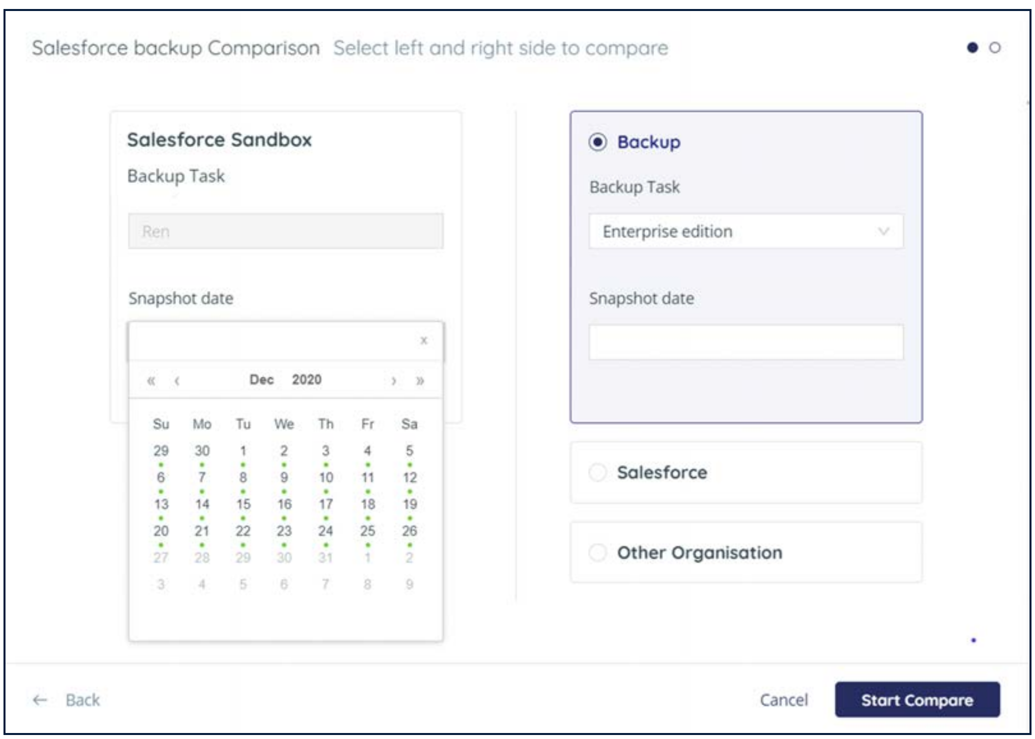
2. The compare dialog screen is displayed. The data comparison option is selected by default. Select the **Metadata** option:



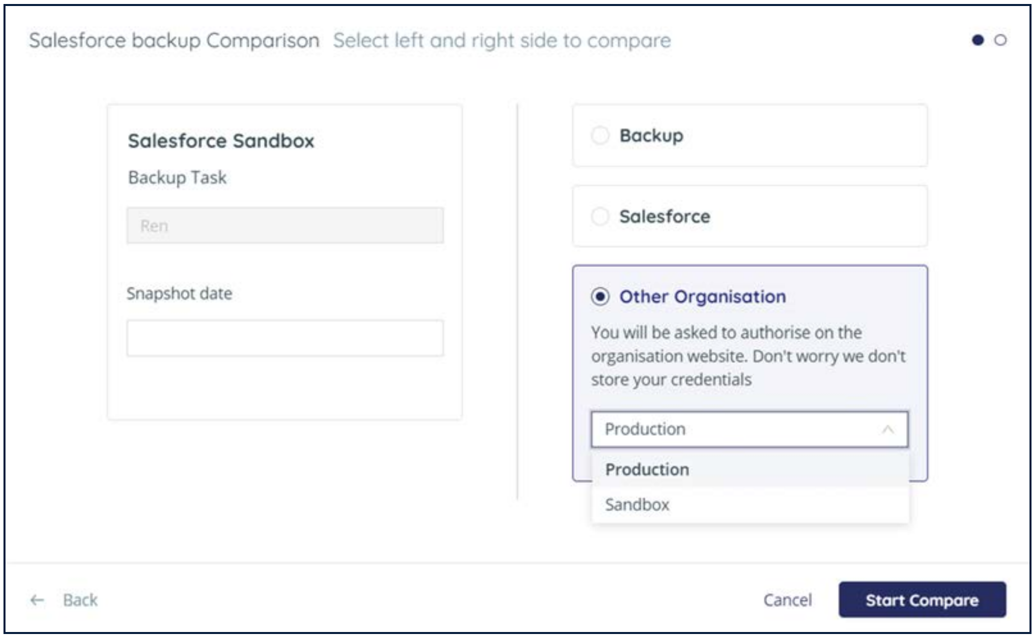
3. You can select which objects you want to compare. By default, all objects are compared during the operation. You can select an object from the drop-down menu:



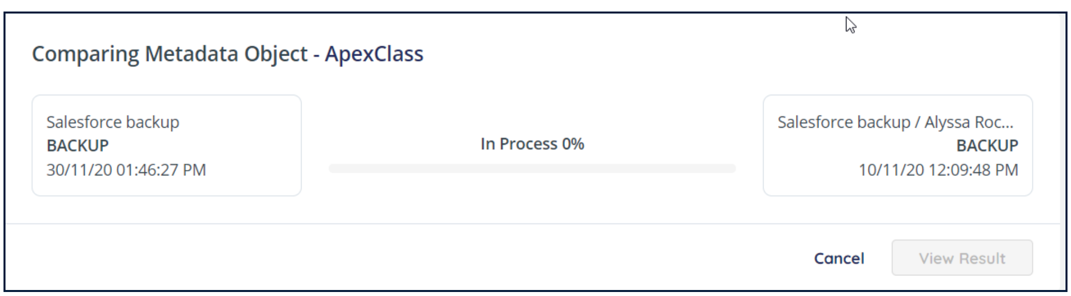
4. In the next step, you are prompted to select the date of the sources of the data for the comparison:



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



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

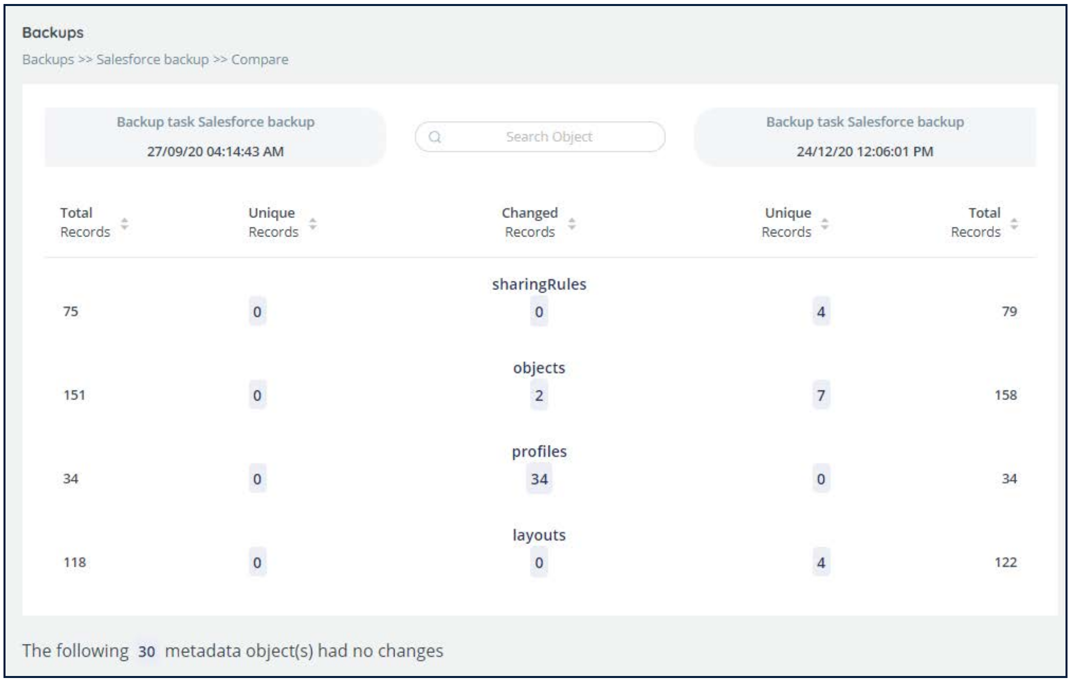


8. You can cancel the task by clicking **Cancel** before it is finished.

6.2.2 Viewing the Metadata Comparison Results

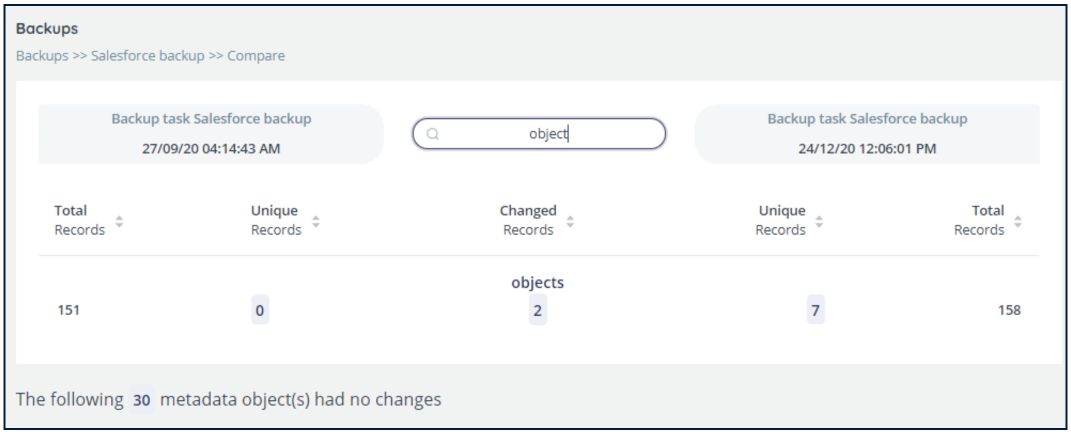
Once the comparison task is finished, the **View Results** button becomes available.

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



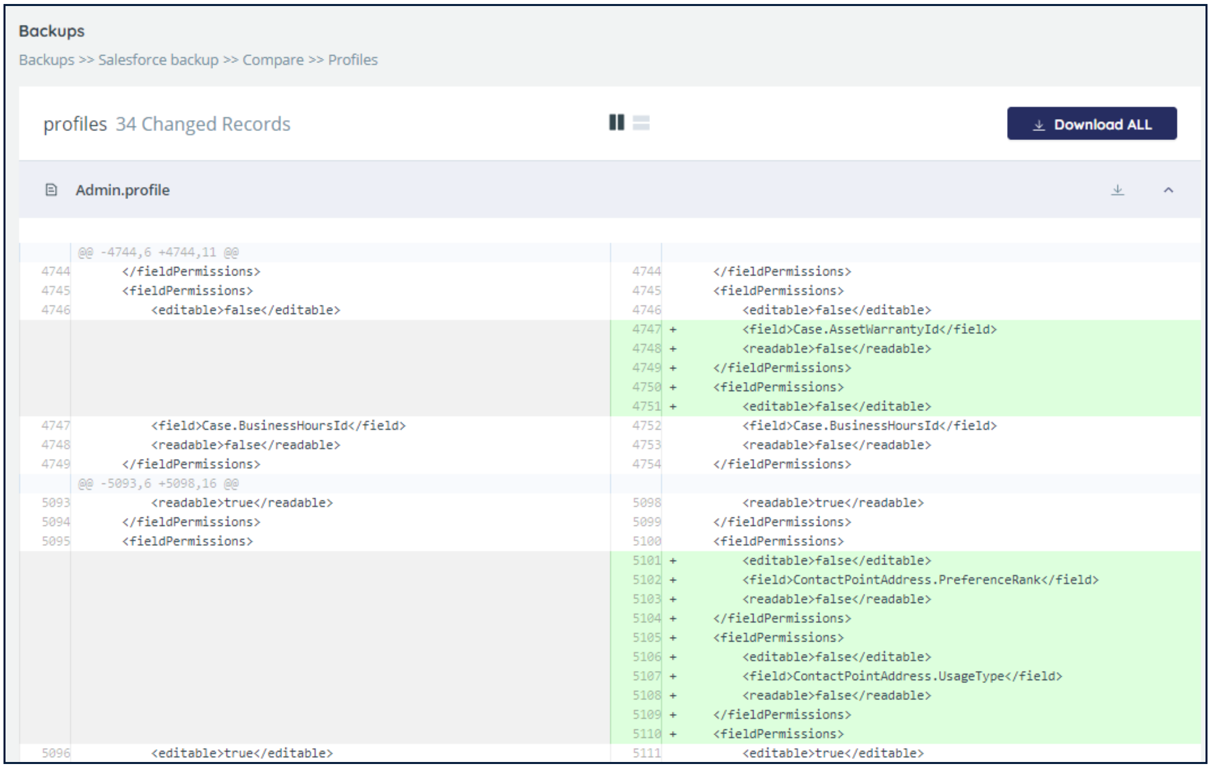
The comparison results are organized on the page in a table displaying the Total number of records, the number of Unique records in both the data sources, and the number of changed records for Objects and Profiles.

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



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:

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.

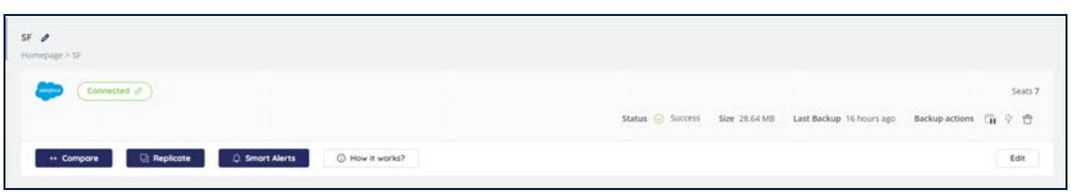


You can expand any row of the table by clicking the downward-arrow button to view the comparison results, or you can download an archive with the corresponding objects via the download button. The records can be displayed side-by-side, or over-under. You can switch the orientation by clicking on the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

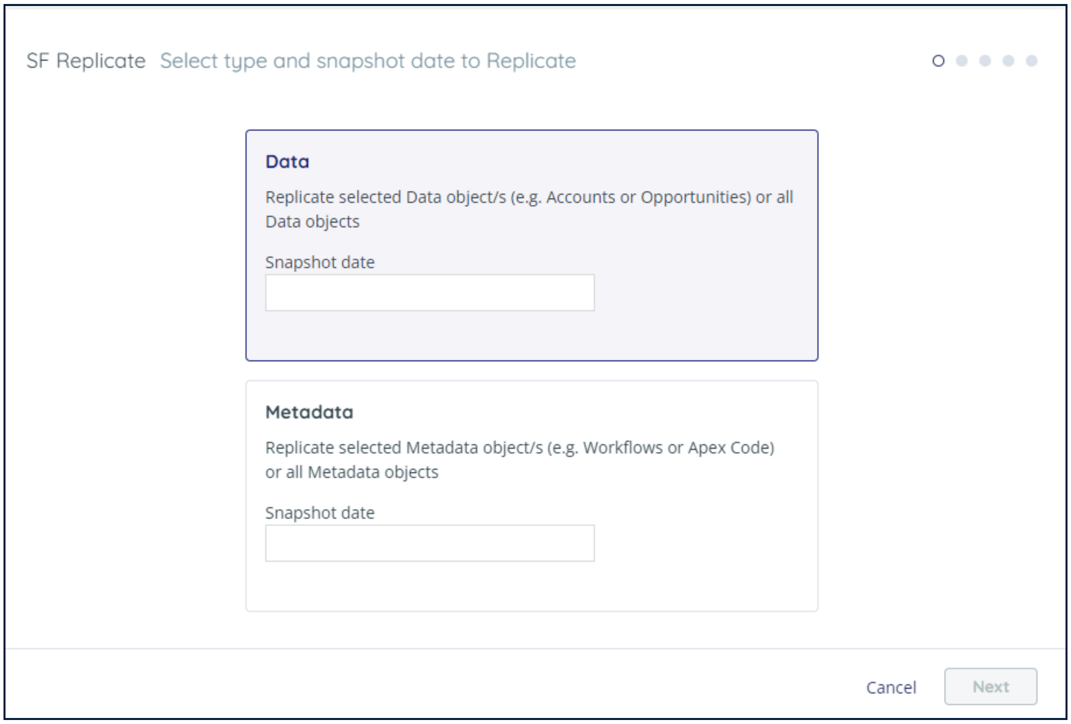
6.3 Replicating your Database

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

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

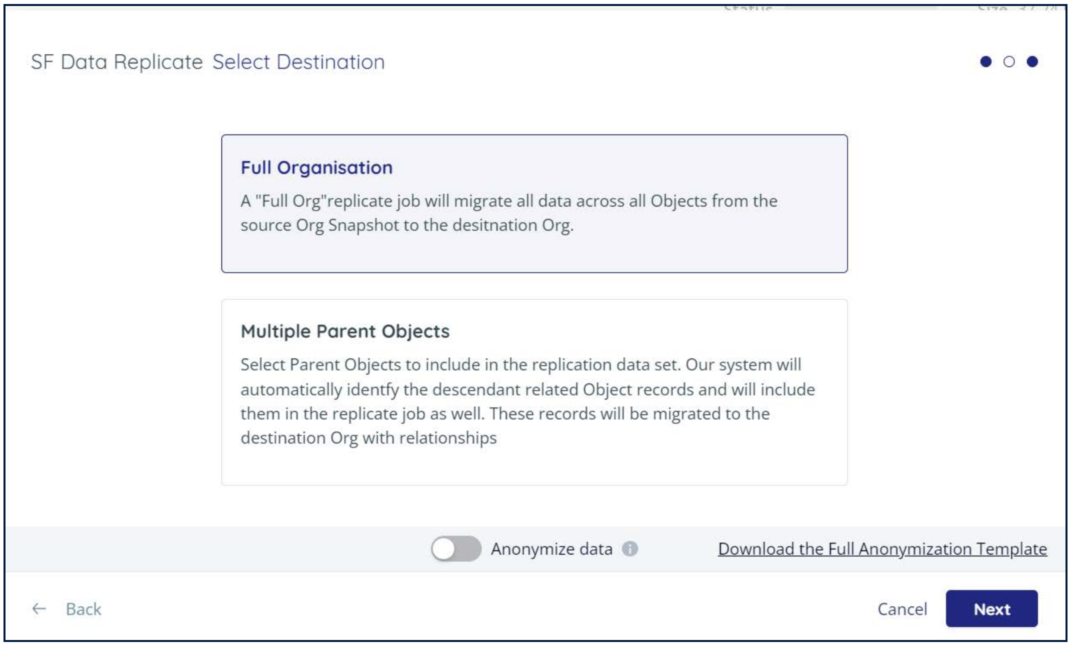


When you click Replicate, you will see the following screen:



6.3.1 Replicating Data

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



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

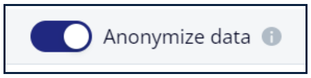
- Select **Full Organization** if you want to restore all data objects. See Full Organization Replication below.
- Select the **Multiple Parent Objects** options to select the objects you want to be replicated and, if needed, apply selection filters on them. See Multiple Parent Objects below.

6.3.1.1 The Need to Anonymize Data

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

6.3.1.2 Data Anonymization in Our backup service Salesforce Data Replication

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



Anonymization Using the Default Template

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

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

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

Customization of Anonymized Data

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

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

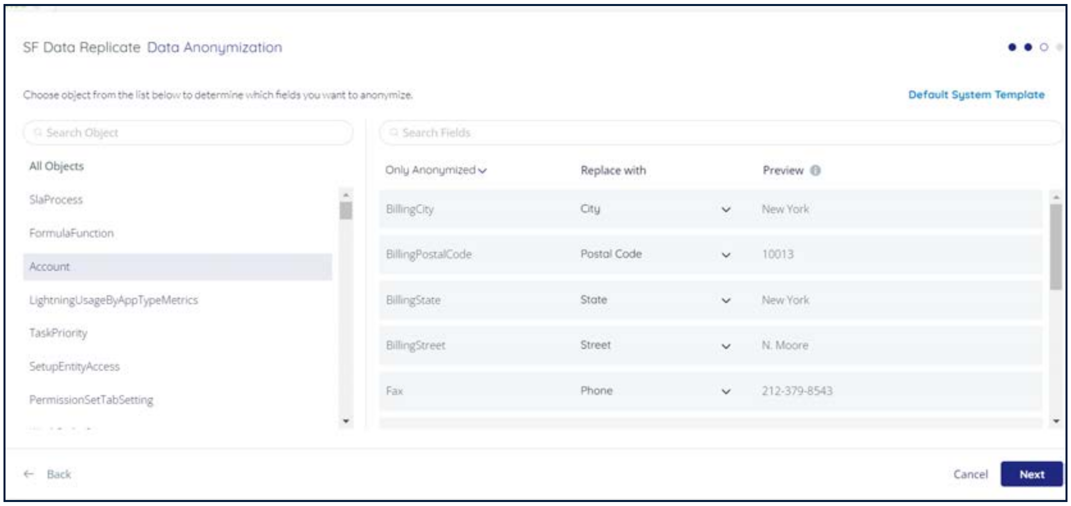
6.3.1.3 Full Organization Replication

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

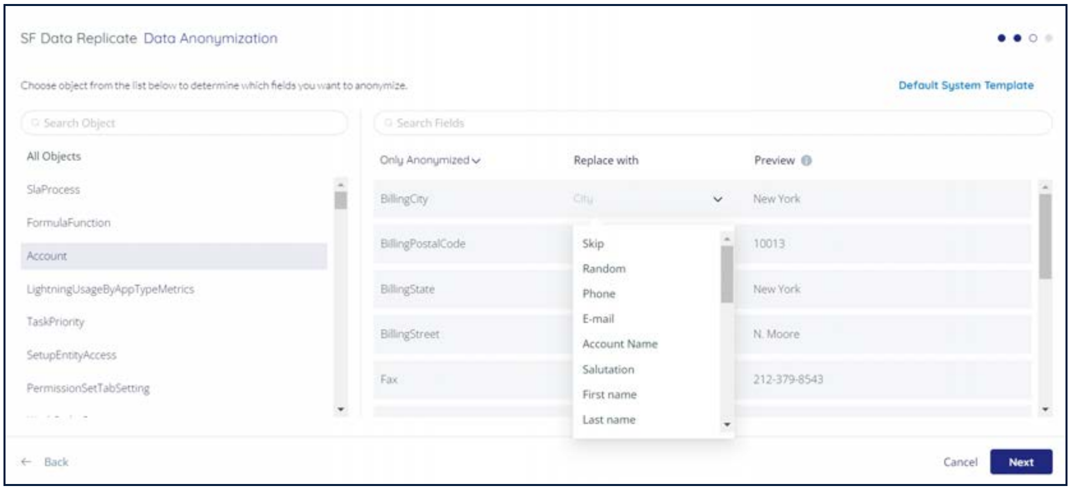
Anonymizing Data

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

You will see the following screen:

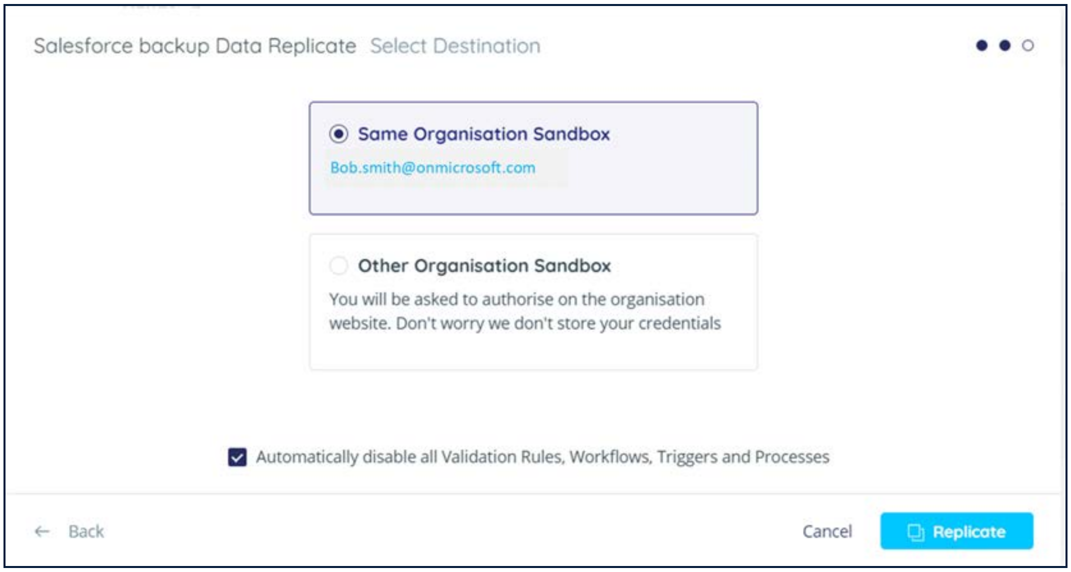


- The left side of the screen contains all of the objects in your data set.
- The right side of the screen lists all of the fields in the highlighted object. Here, for each field, you can determine whether you want to:
  - Skip this field (it won't be anonymized)
  - Replace it with random characters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



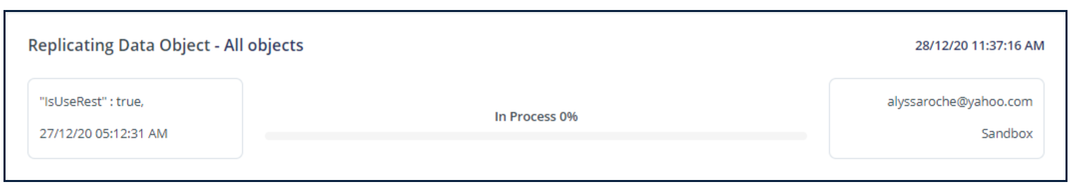
When you are done customizing your fields, click **Next**.

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



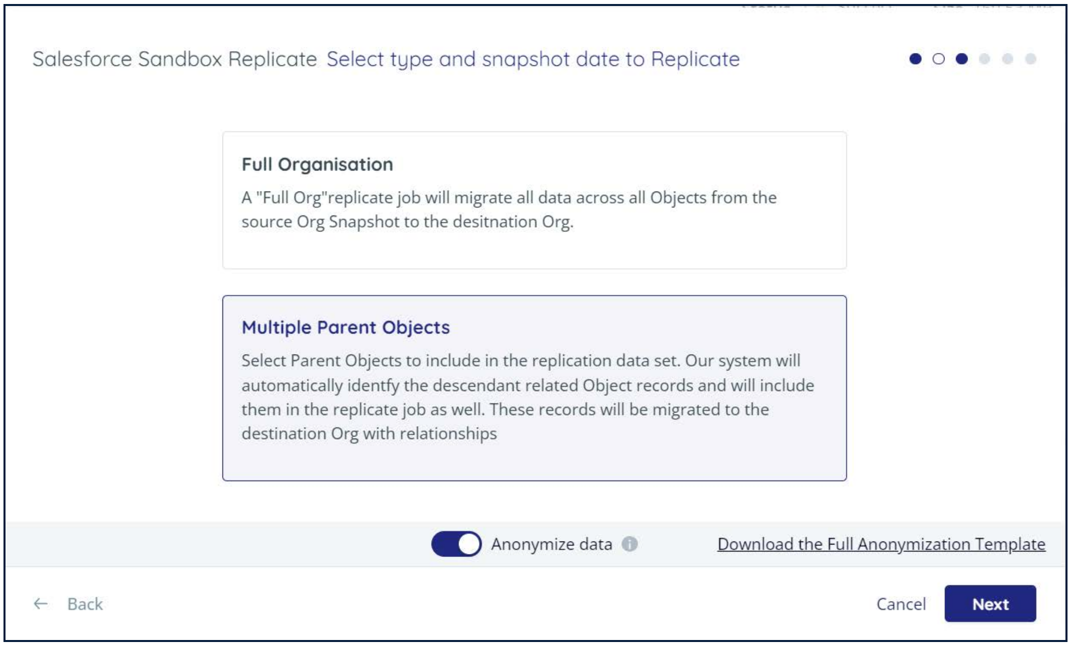
You can unmark the checkbox **Automatically disable all Validation Rules, Triggers, and Processes** if you want these elements to be enabled in the replicated data. By default, the checkbox is marked, thus disabling the validation of rules, workflows triggers, and processes. This is done as a precaution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

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



6.3.1.4 Multiple Parent Objects

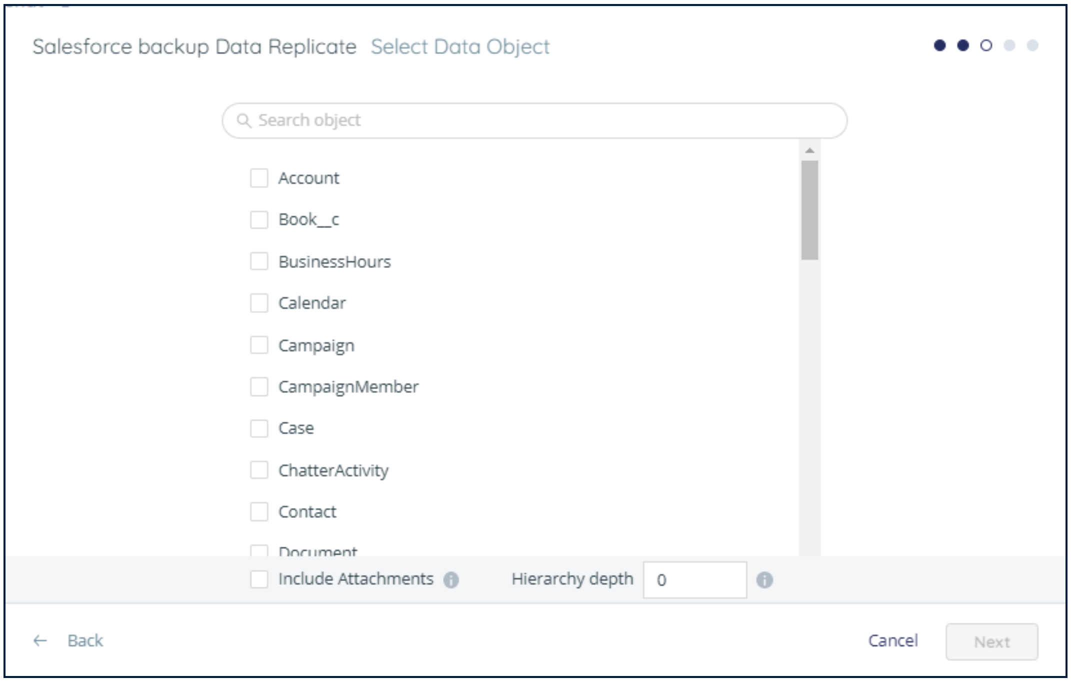
After selecting the snapshot date, select **Multiple Parent Objects** and click **Next**.



Anonymizing Data

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

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



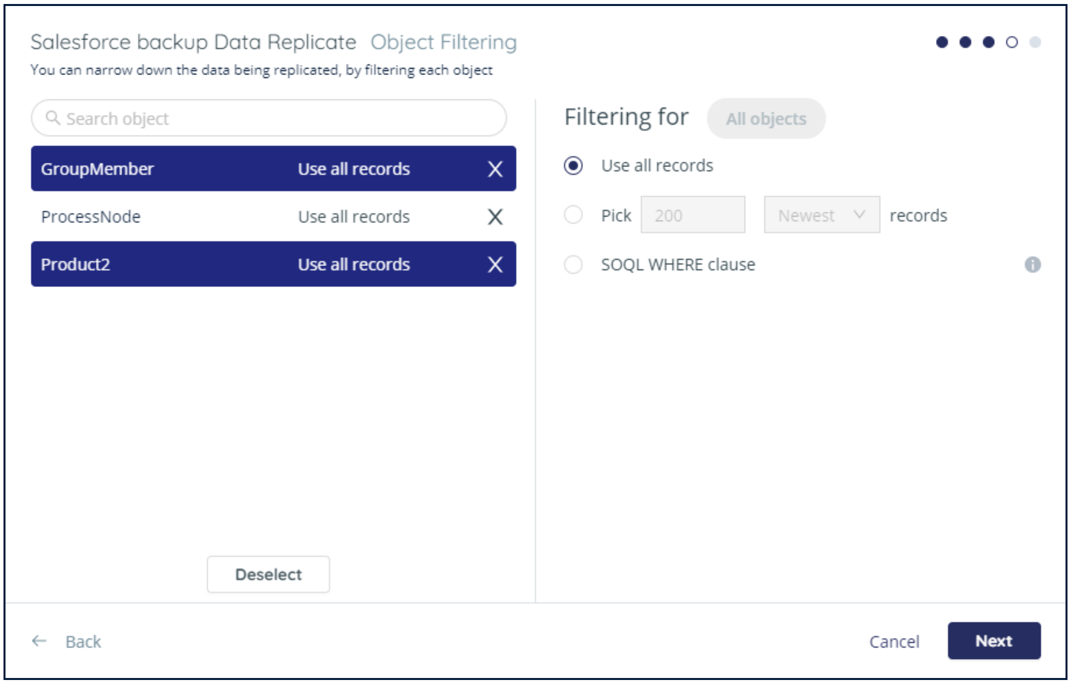
Select the objects you want to replicate. You can search by typing at least 3 symbols matching part of the name of the object.

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

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

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

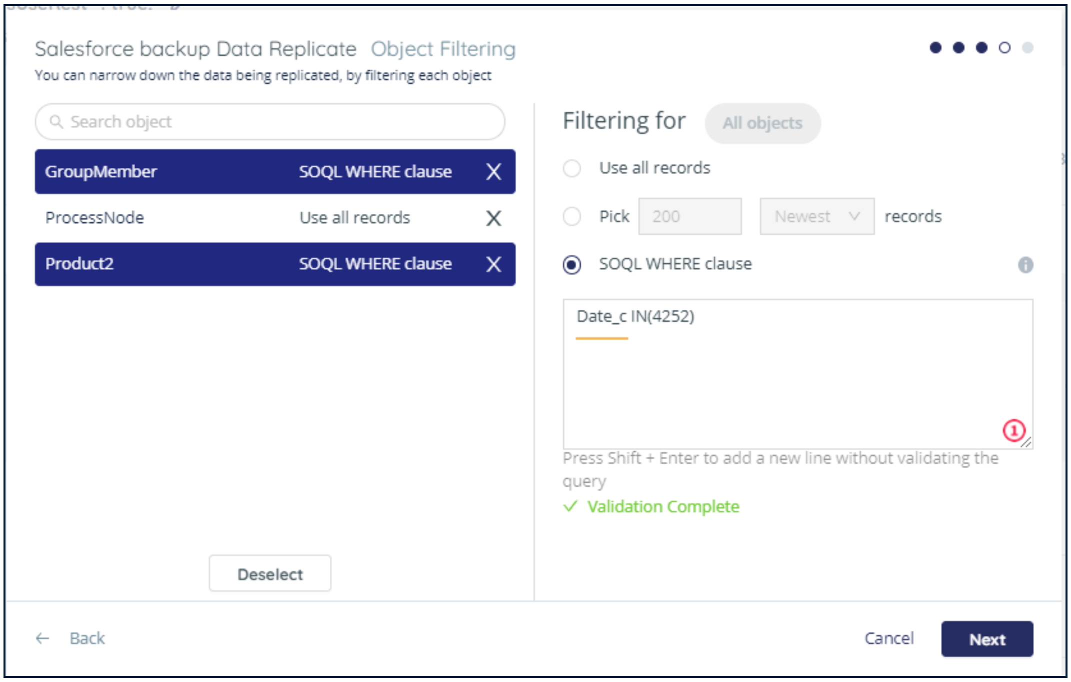
By default, all records are selected for replication in the selected Objects. You can set up selection rules manually for any number of objects. To select multiple objects, click the corresponding lines in the list. You can define different rules for the objects – deselect the objects for which you have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



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

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

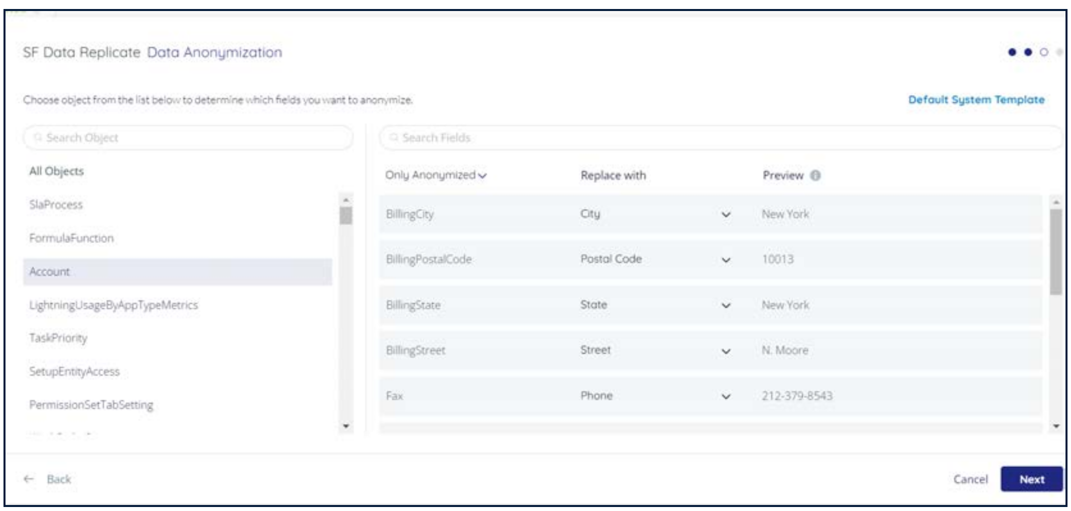
Note: The replication system only validates the query syntax and doesn't check that the query can be applied to the selected objects. An inapplicable SOQL clause may lead to a failure in the replication procedure.



Click **Next**.

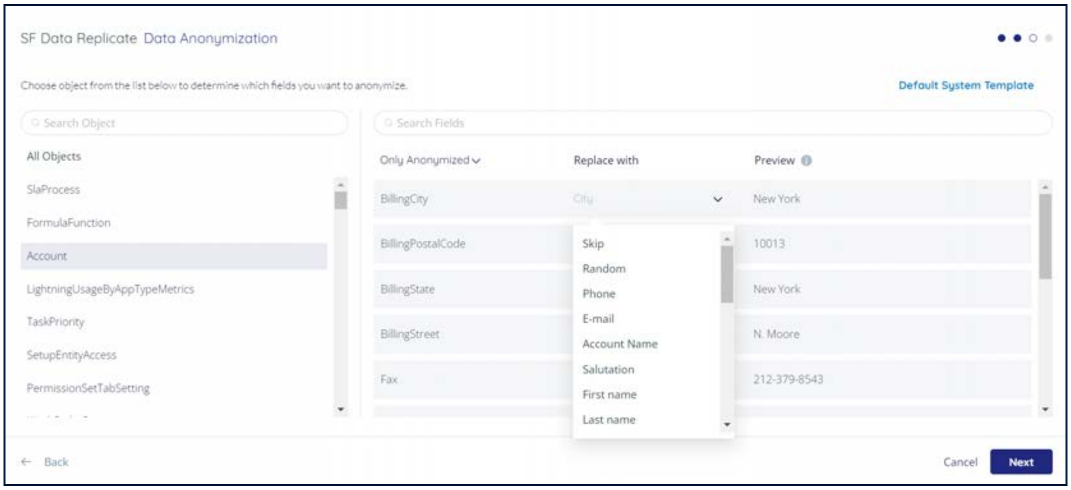
Customizing Data Anonymization Fields

You will see the following screen:



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

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

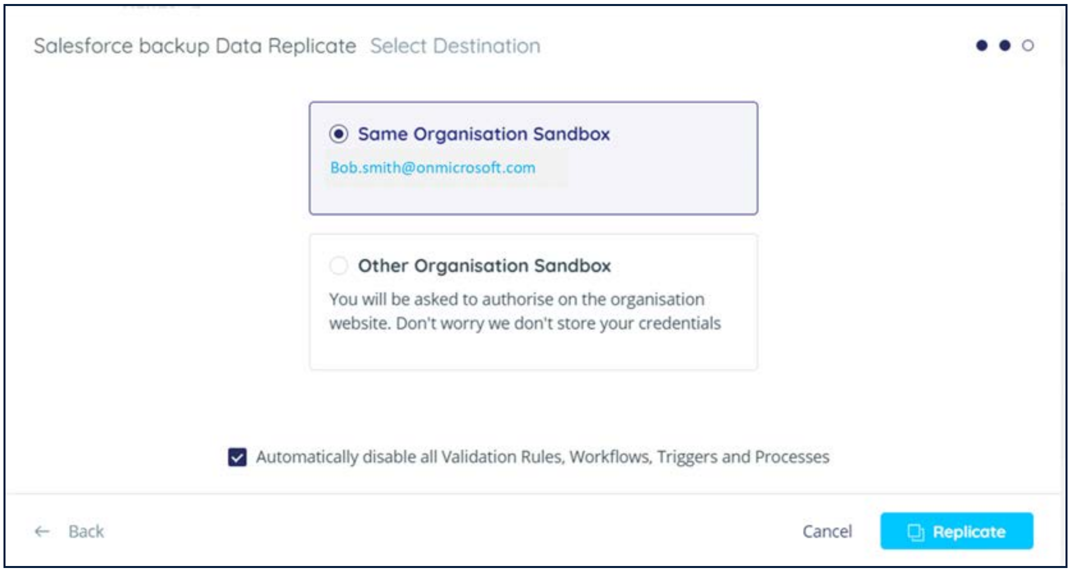


When you are done customizing your fields, click **Next**.

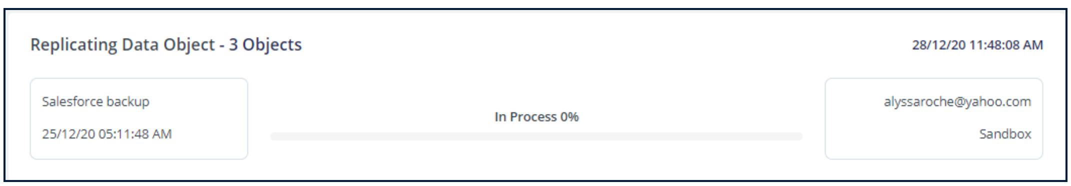
You are taken to the **Select Destination** step.

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

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

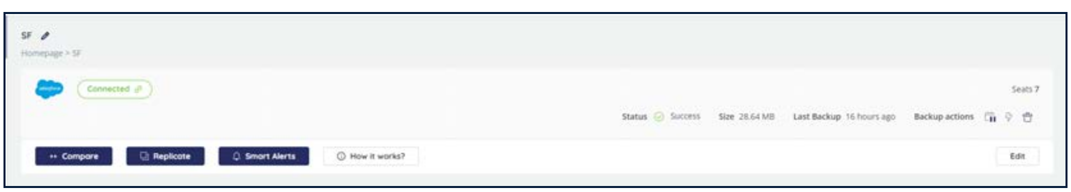


Click **Replicate** to create the replication task. The task will be assigned to the next available processing machine - this may take several minutes. You can view the progress of the task in the *Replicates* tab of the backup page.

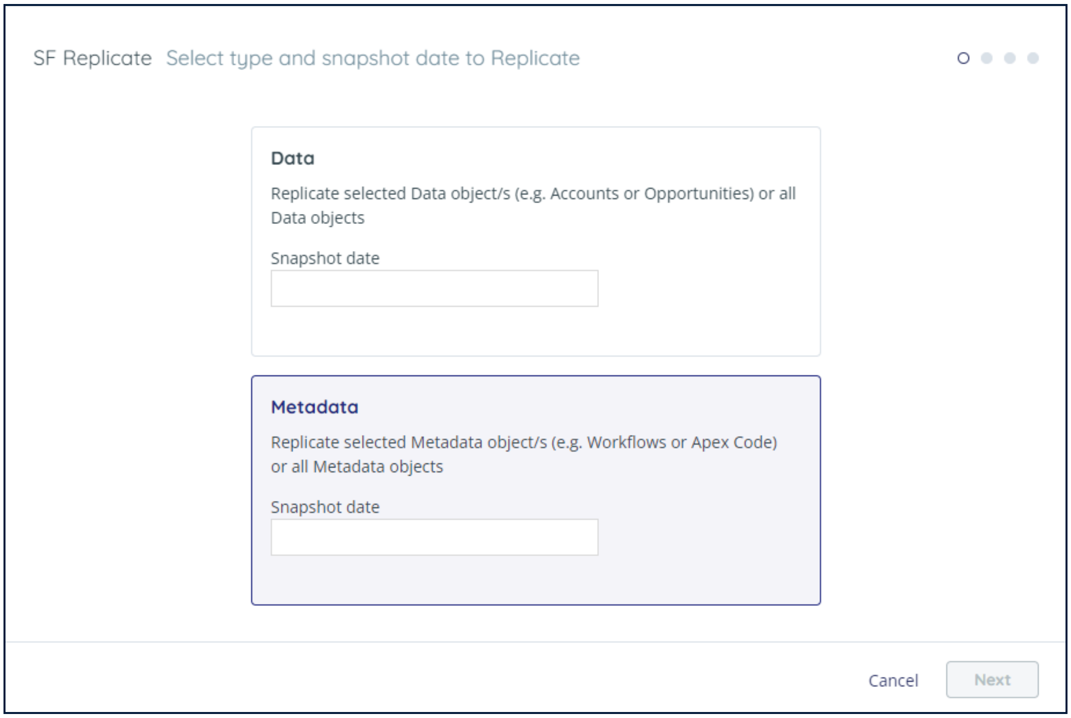


6.3.2 Replicating Metadata

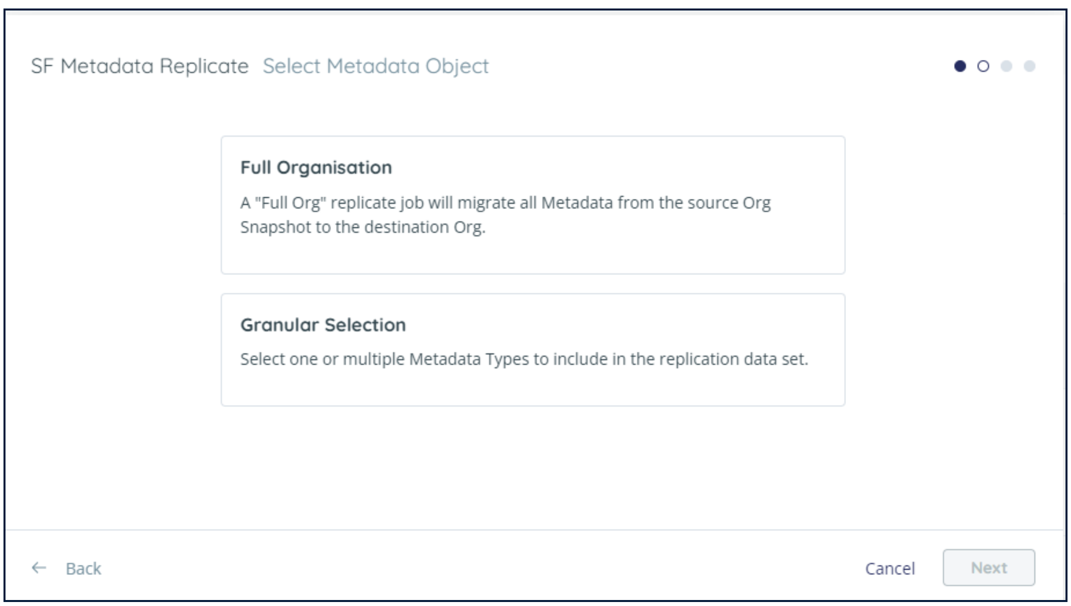
To initiate the metadata comparison procedure, follow these steps:



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



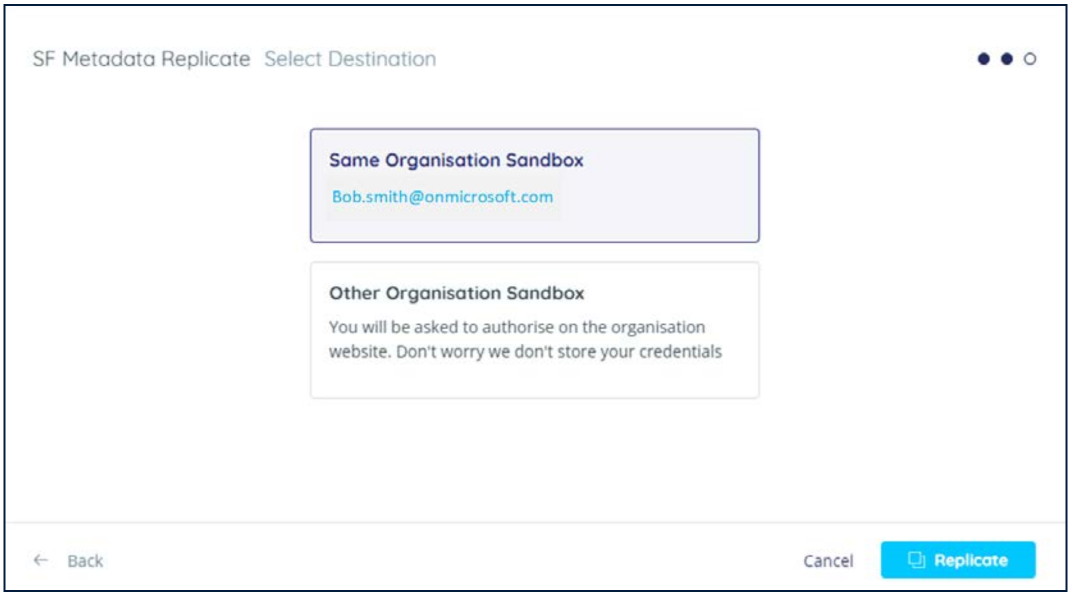
2. The Data option is selected by default. Select the **Metadata** option, choose a snapshot date, and click **Next**.



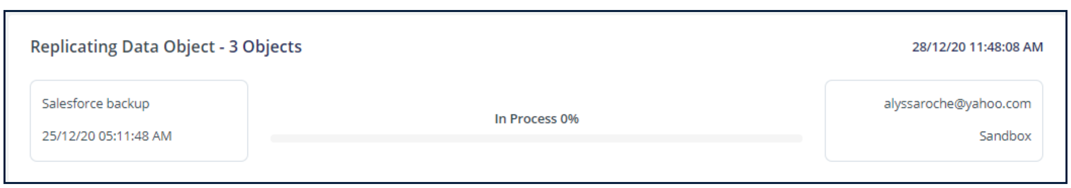
Choose either **Full Organization**, to migrate all metadata from the source organization snapshot to the destination organization, or **Granular Selection**, to select which metadata types to include in the replication data set.

6.3.2.1 Full Organization

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

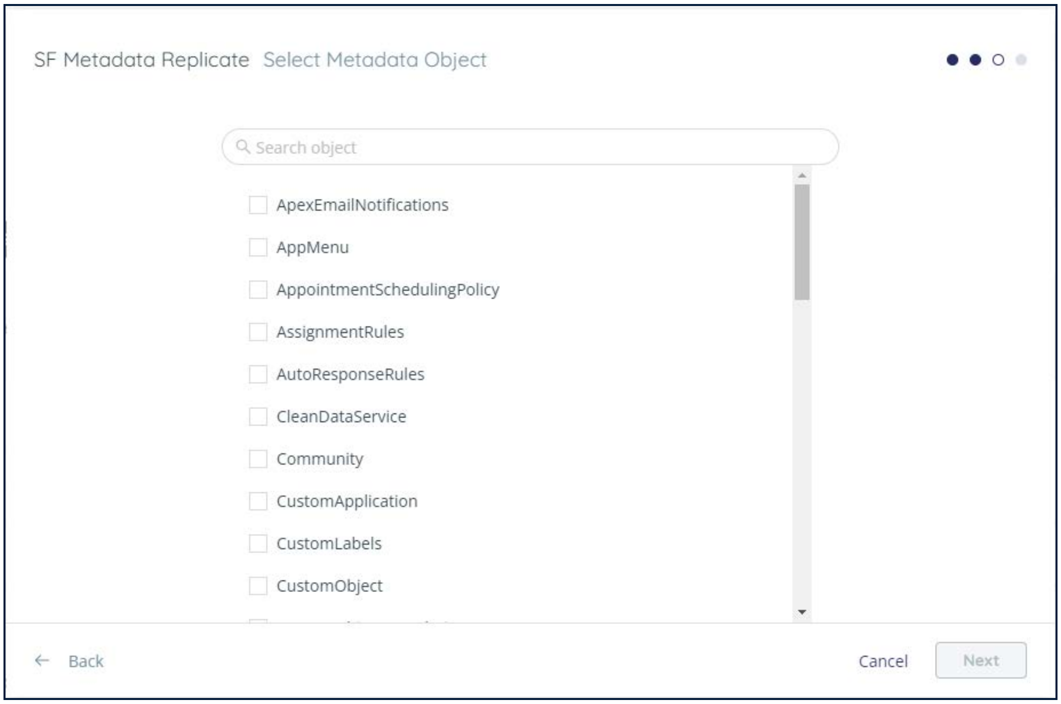


Click **Replicate** to create the replication task. The task will be assigned to the next available processing machine - this may take several minutes. You can view the progress of the task in the *Replicates* tab of the backup page.



6.3.2.2 Granular Selection

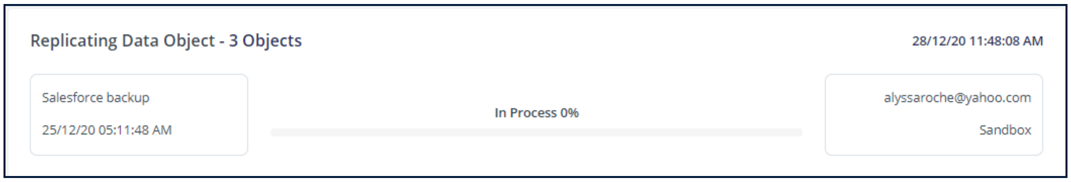
Choose **Granular Selection**. You are taken to a screen where you can select which metadata objects you would like to duplicate:



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

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

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



6.4 Smart Alerts

6.4.1 Anomaly Detection

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

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

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

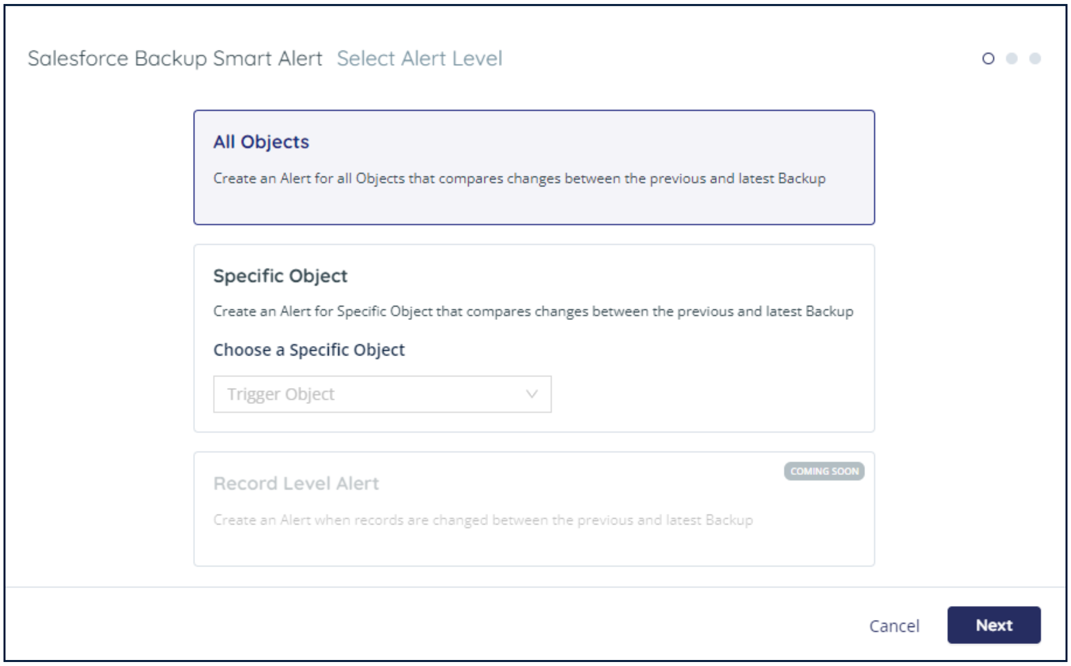
6.4.2 Setting a Smart Alert

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

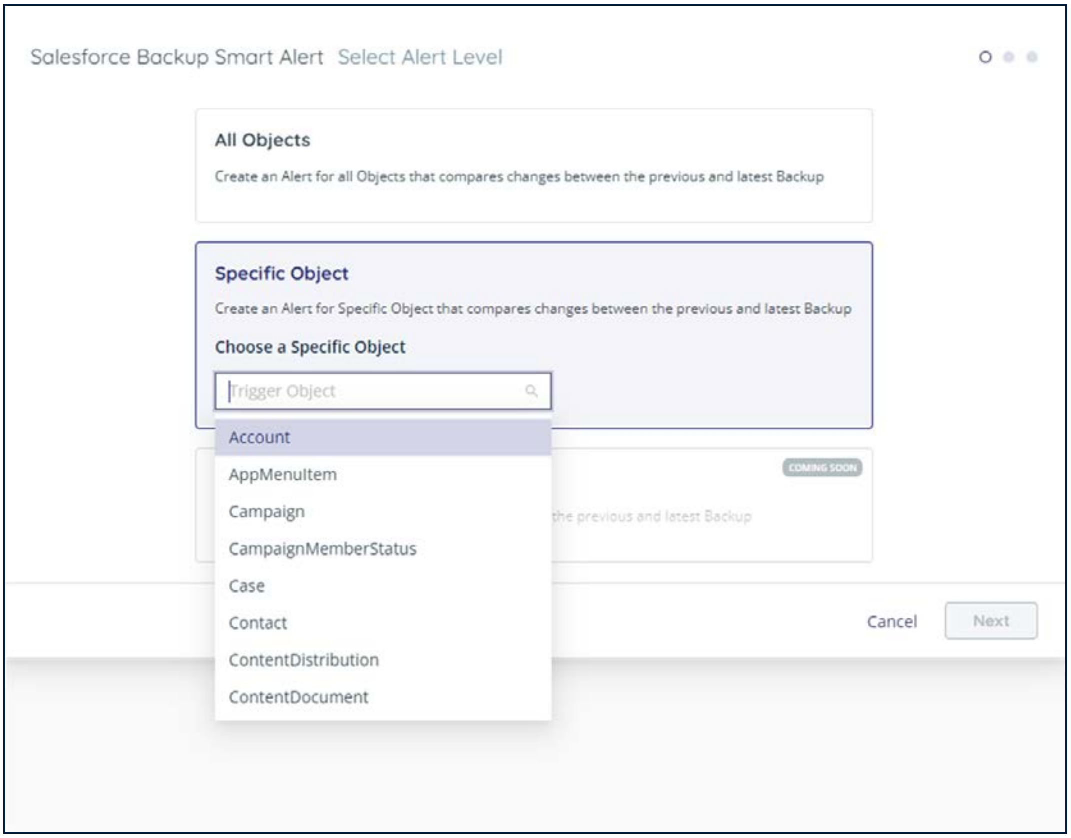
> **Note:** Before you can set a smart alert, you must have at least one successful Salesforce backup that our backup service can use as the baseline for future comparisons. See [Creating a New Backup Task](#).

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

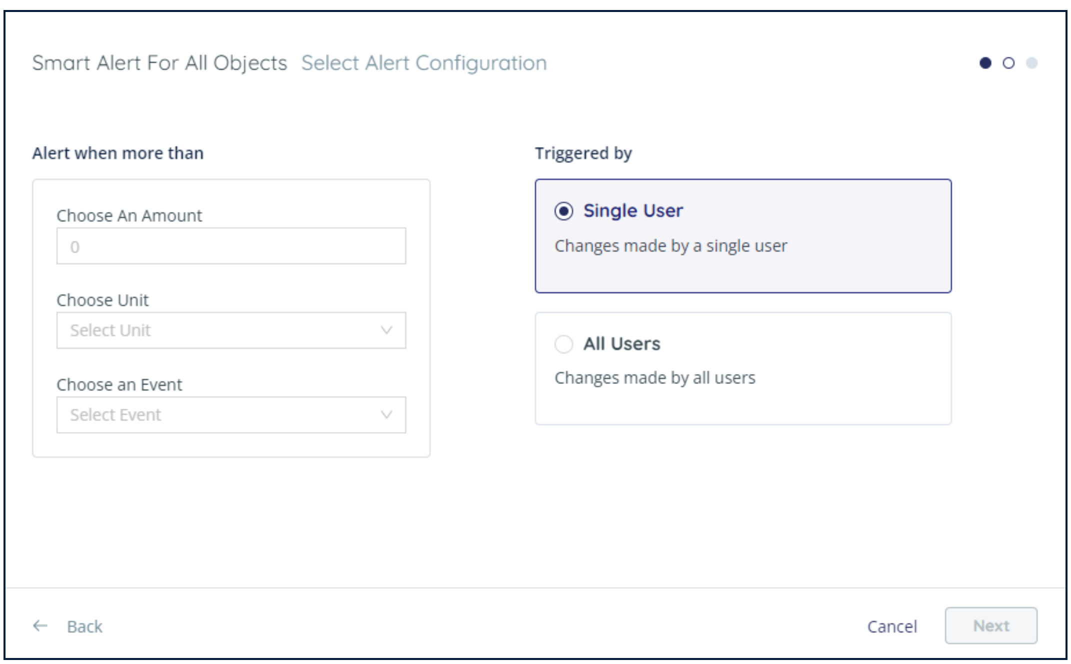
2. By default, **All Objects** are selected. If this is your preference, click **Next**.



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



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



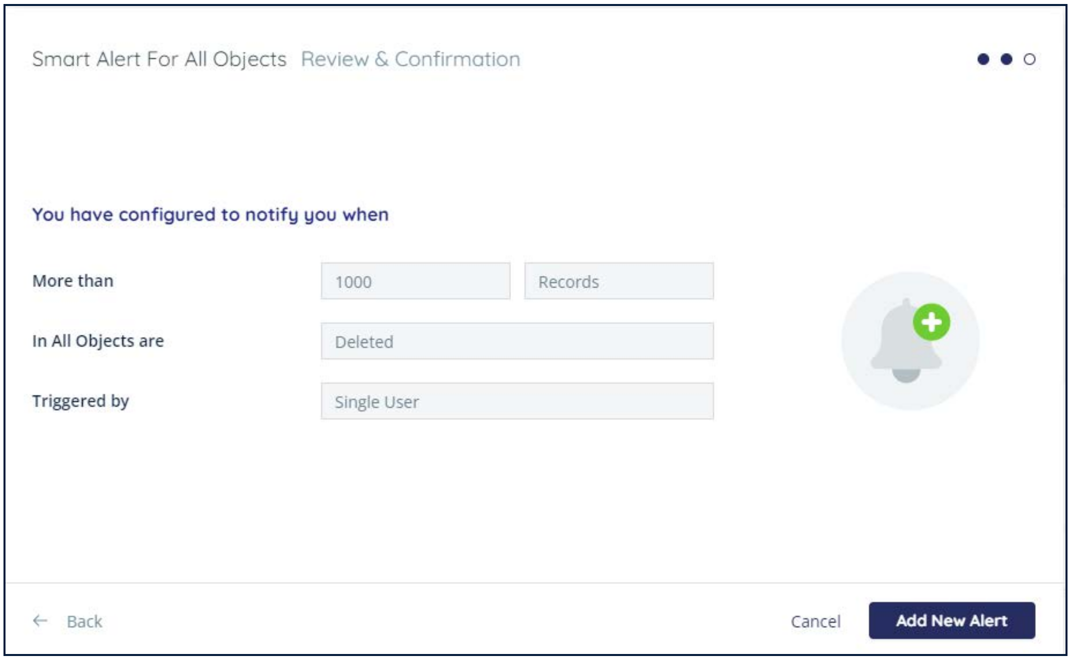
- Alert when more than:
  - Number of items
  - Either % or number of records
  - Is added, updated, or deleted

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

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

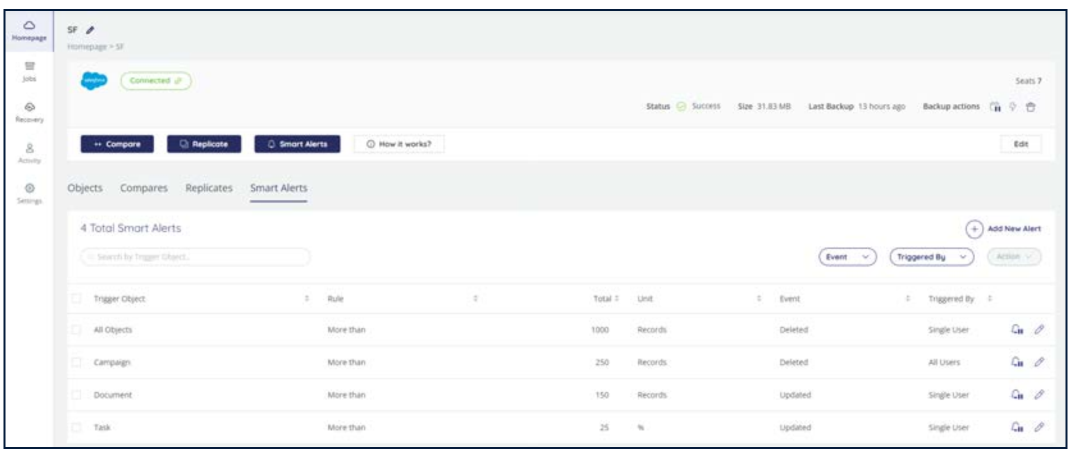
> **Note:** Which option is preferable, changes made by a single user or all users? It depends on the volume of records in your organization's Salesforce database, the record volatility, and the data sensitivity.

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



6.4.3 Smart Alert List

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



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

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

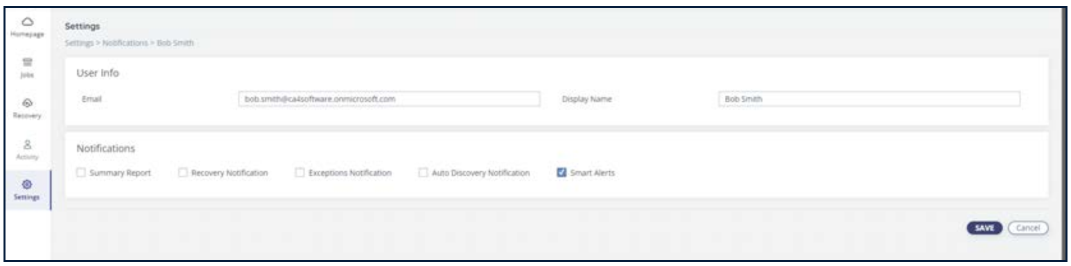
Finally, you can disable or enable an alert, by clicking the bell icon.

6.4.4 Smart Alert Notifications

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

To add additional recipients:

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



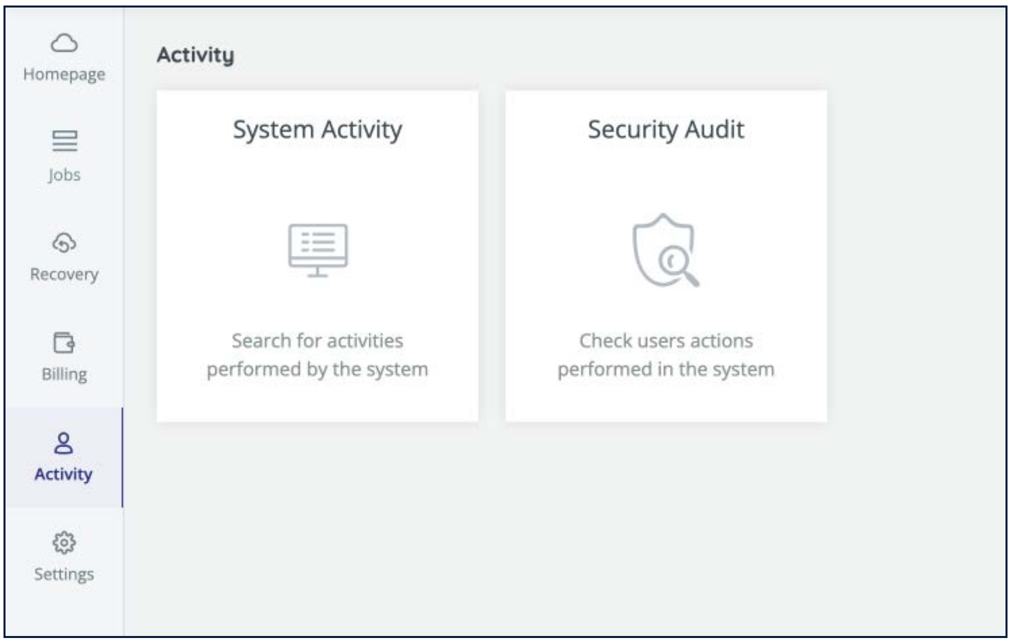
When changes trigger a Smart Alert, all of the users on the list will receive an email that summarizes what has changed. With this information, Admins can investigate the changes, and take appropriate the appropriate action.

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.

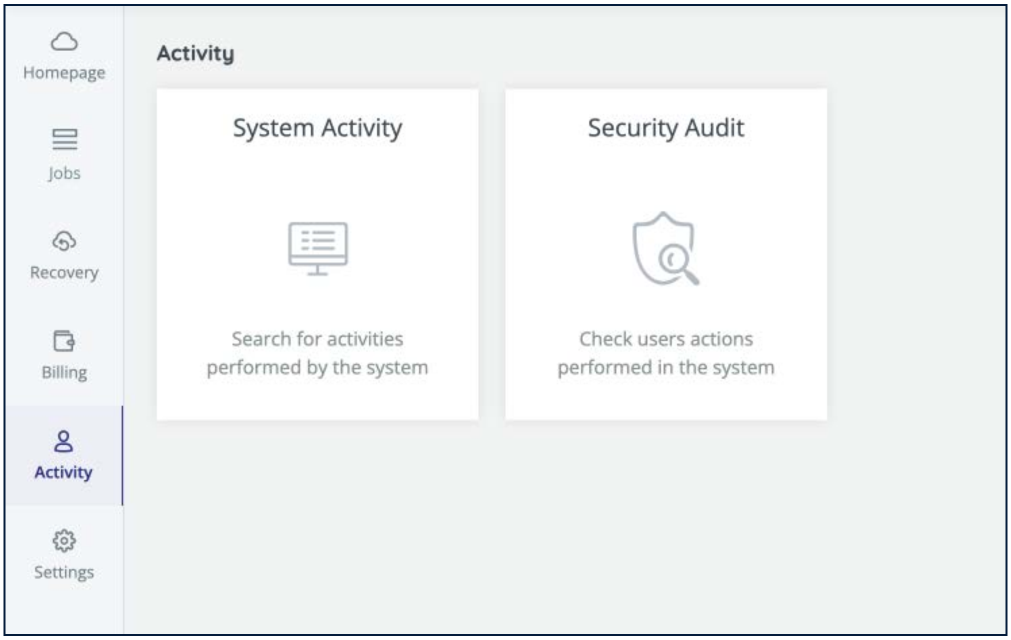
7.1 Viewing Account Activity

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

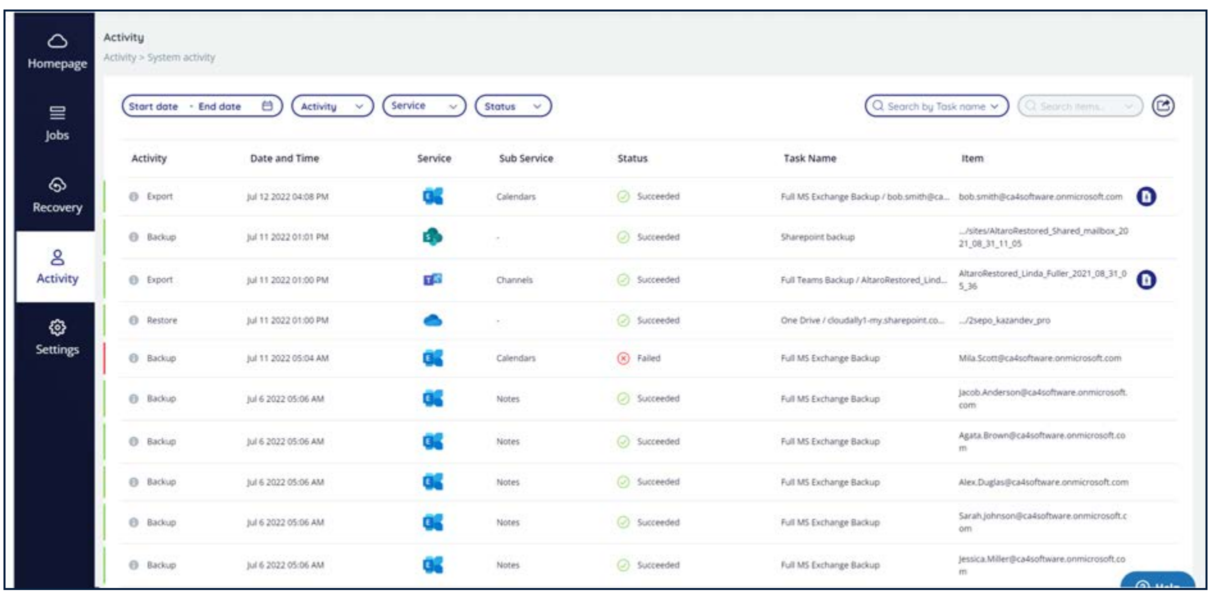


7.1.1 System Activity

Click **System Activity**.

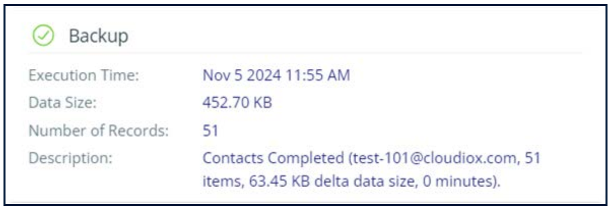


The *System Activity* page displays your account activity, with details such as Activity, Date and Time, Service, Sub-Service, Status, Task Name, and Item.

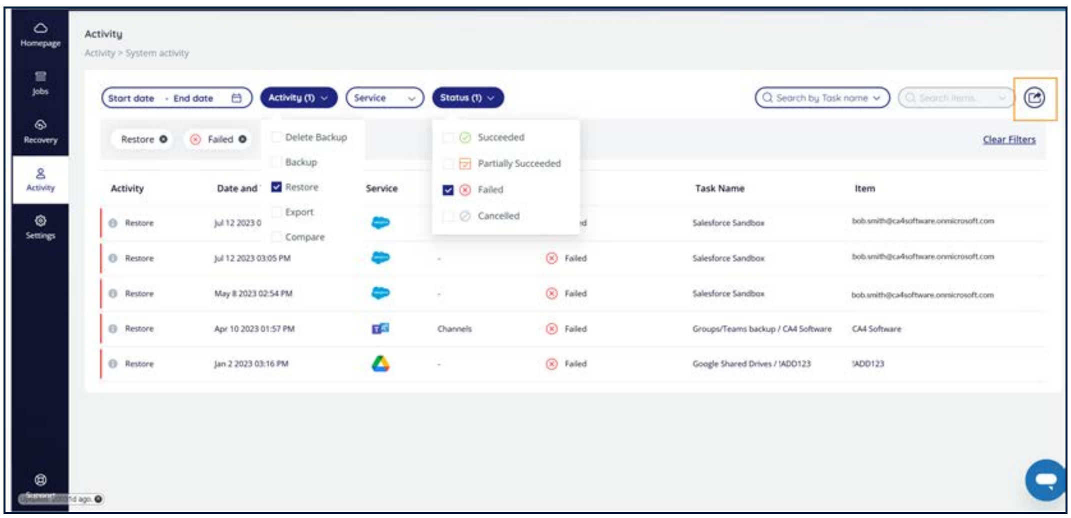


This page enables you to:

- Filter and search the list of backup tasks
- View more details on any backup task. This can be achieved by clicking the "i" (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.



- Export the Activity Log as a CSV file. Any filters selected on the page will also apply to the exported log file. For example, you could choose to only see Restore tasks that have failed.



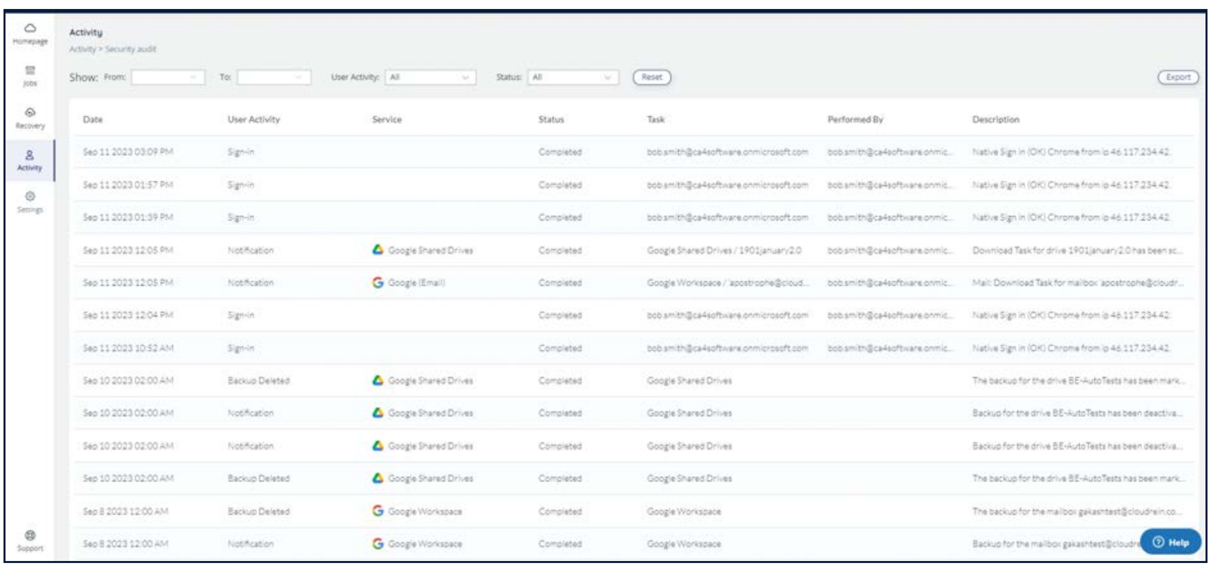
> **Note:** Administrators can grant users permission to see the *System Activity* page by clicking **Settings > User Management**, and checking "View Account Activity."

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.



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

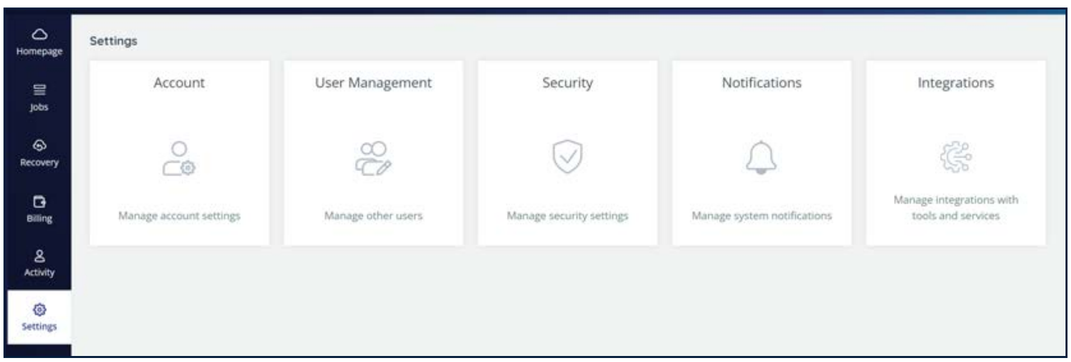
> **Note:** Administrators can grant users permission to see the *Security Audit* page by clicking **Settings > User Management**, and checking "View Security Audit Page."

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
- Integrations

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

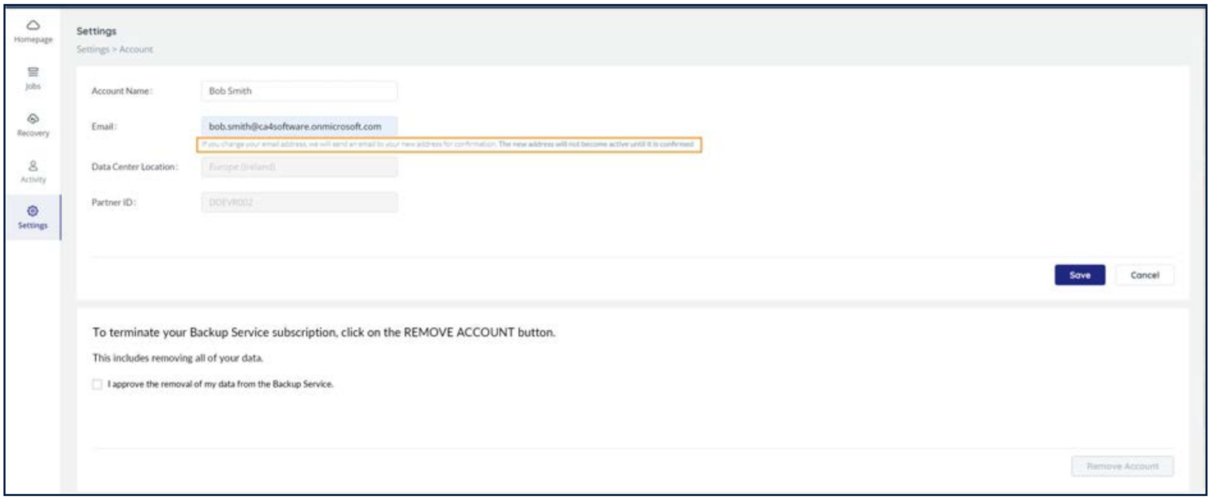


7.2.1 Account Settings

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

To update or change your account details:

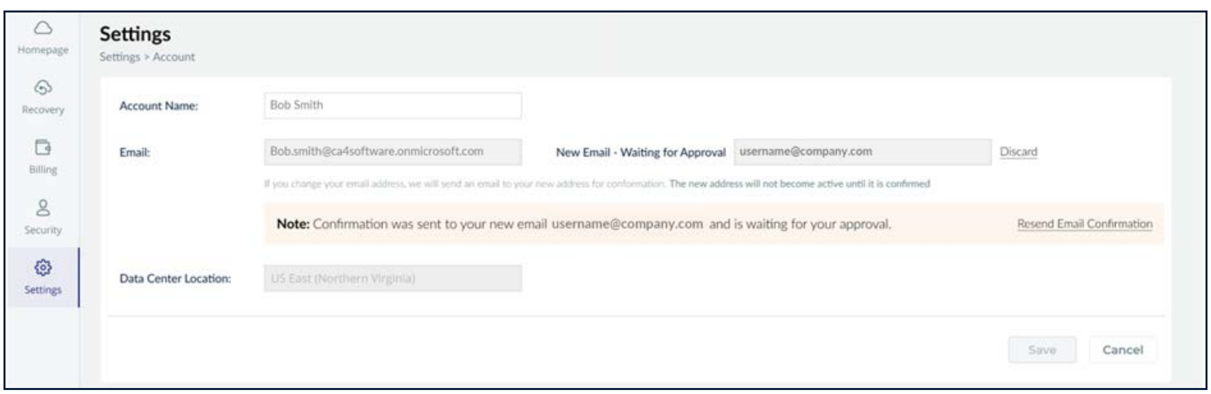
1. From the Navigation Panel, click **Settings** and then click **Account** . The *Settings > Account* page is displayed.



You can update the Account Name and/or Email.

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

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



7.2.2 Canceling Your Subscription

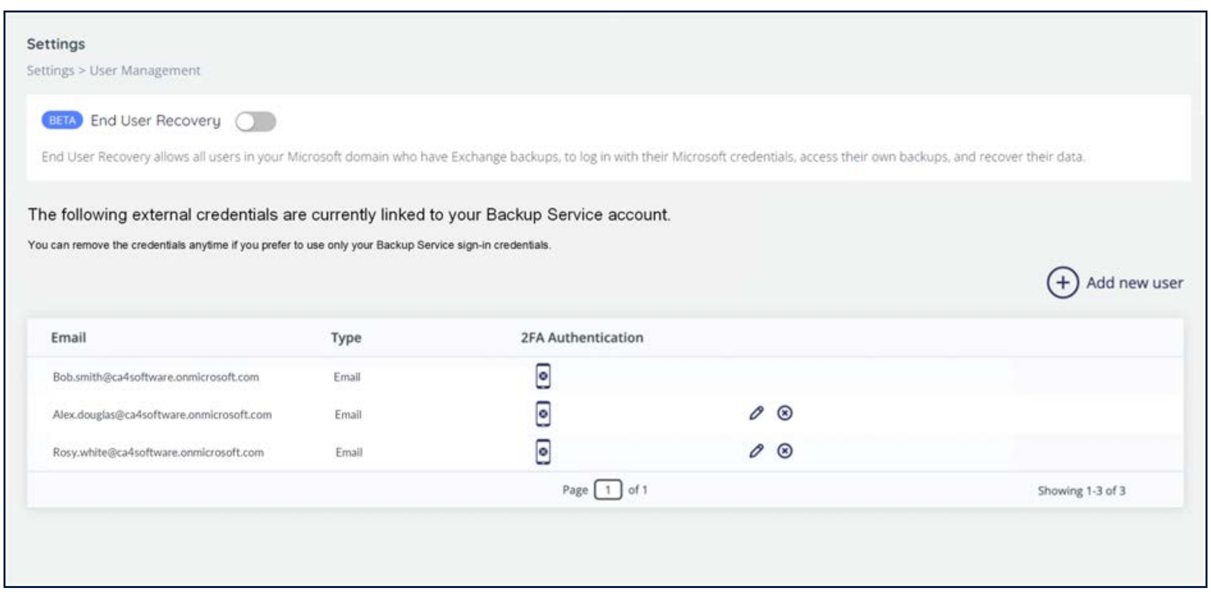
To cancel your subscription:

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

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

7.3 User Management

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

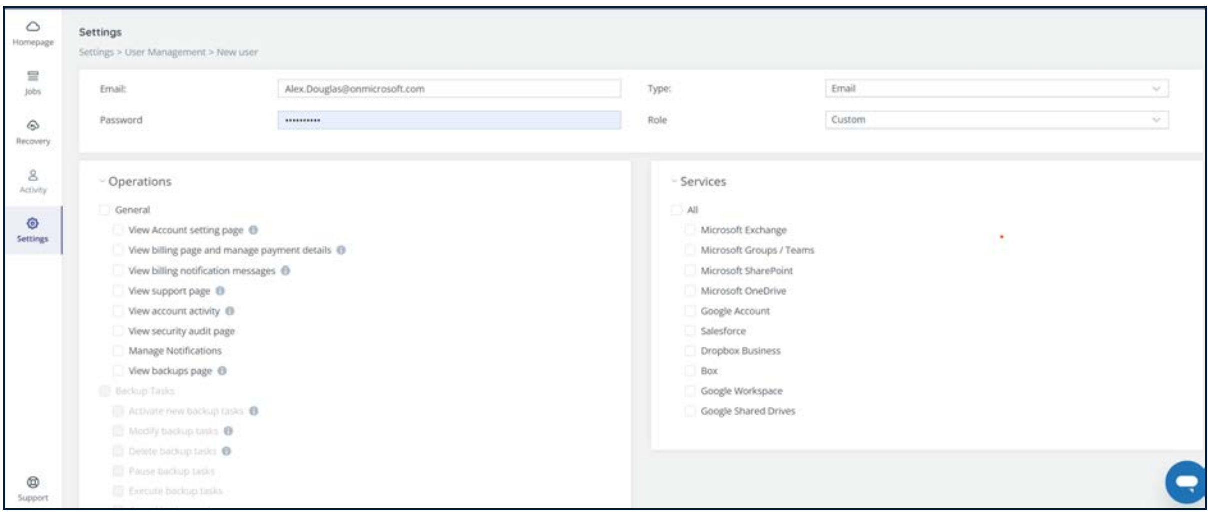


7.3.1 Adding a New User

System Administrators, both those who logged in to our backup service with a username and password, or with Microsoft credentials, can add new users.

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.

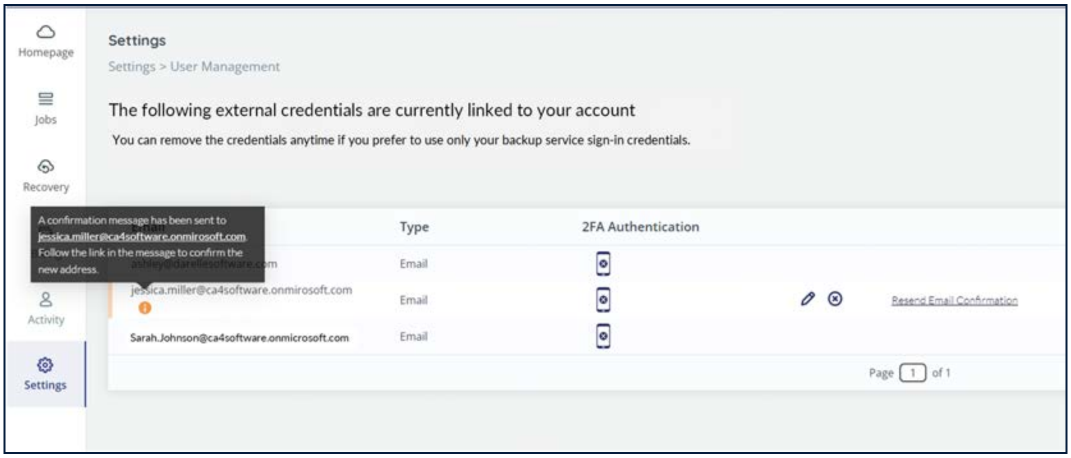
- Enter the new user's email address.
- Select the Authentication Type: Azure or Email .
- Select the permissions role for the user. Selecting the role "Administrator" enables permissions to all services and operations. Or, you can selectively choose which permissions to grant from the list of services:



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

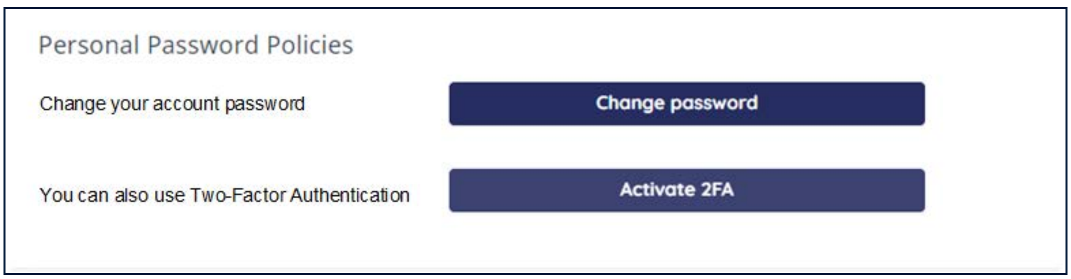
You will be returned to the Settings page. To complete the process, the user must confirm their email address using the link sent via email. This is a security measure, which ensures that the user's email address is valid.

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**.



7.4 Security Settings

The *Security Settings* page enables you to:



- Update your password
- Set up two-factor authentication

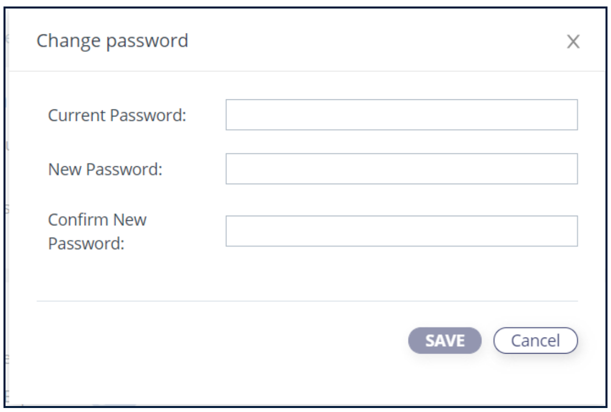
You can also enforce certain security policies for your users' accounts.

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

7.4.1 Changing Your Password for Credential-Based Authorization

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

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



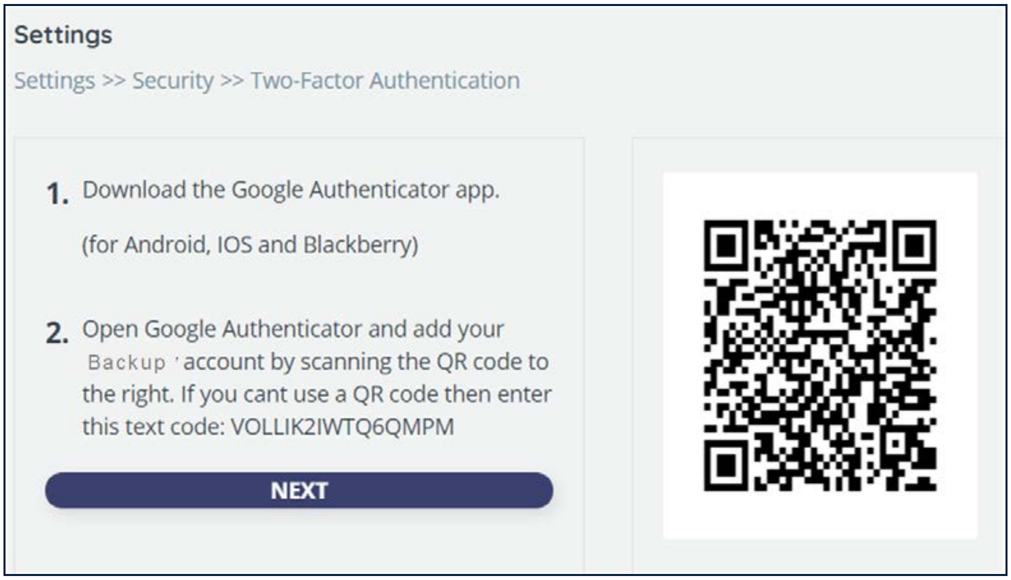
3. Enter the current password in the *Current Password* field.
4. Enter the new password in the *New Password* field.
5. Re-enter the new password in the *Confirm New Password* field.
6. Click **SAVE**. You can now use this password to access your account.

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.



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).

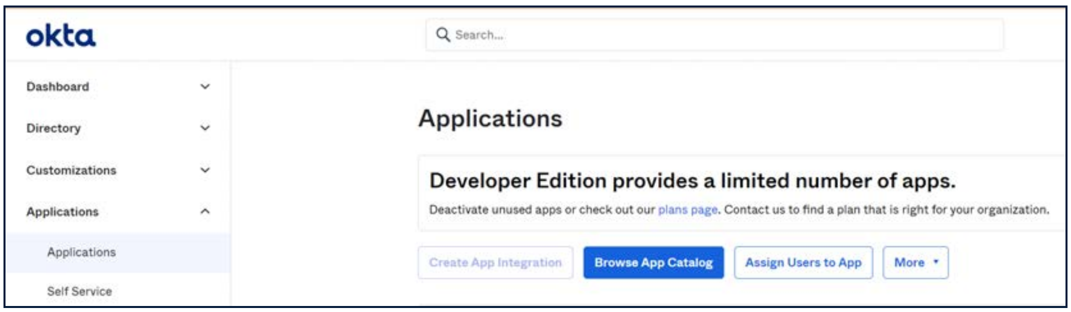
Our backup service supports Okta as its SAML provider.

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

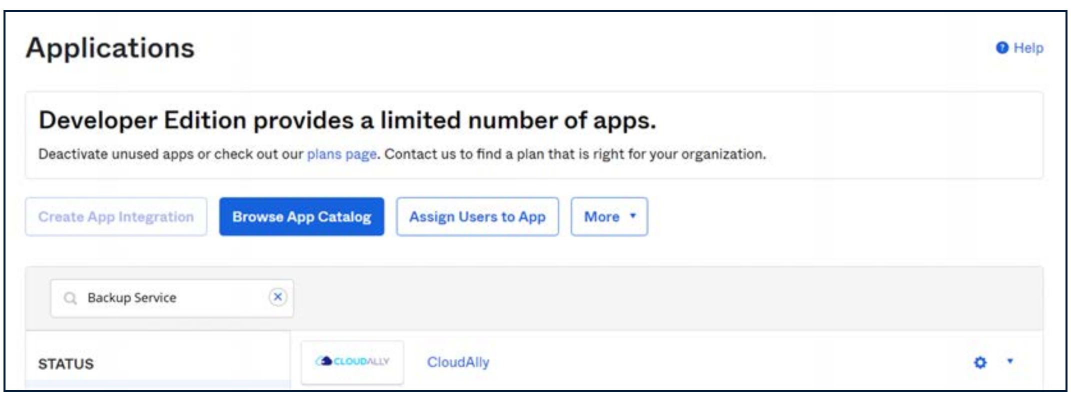
- Setting up our Backup Service in the Okta Application
- Setting up Okta in our backup service application

7.4.3.1 Setting up our Backup Service in the Okta Application

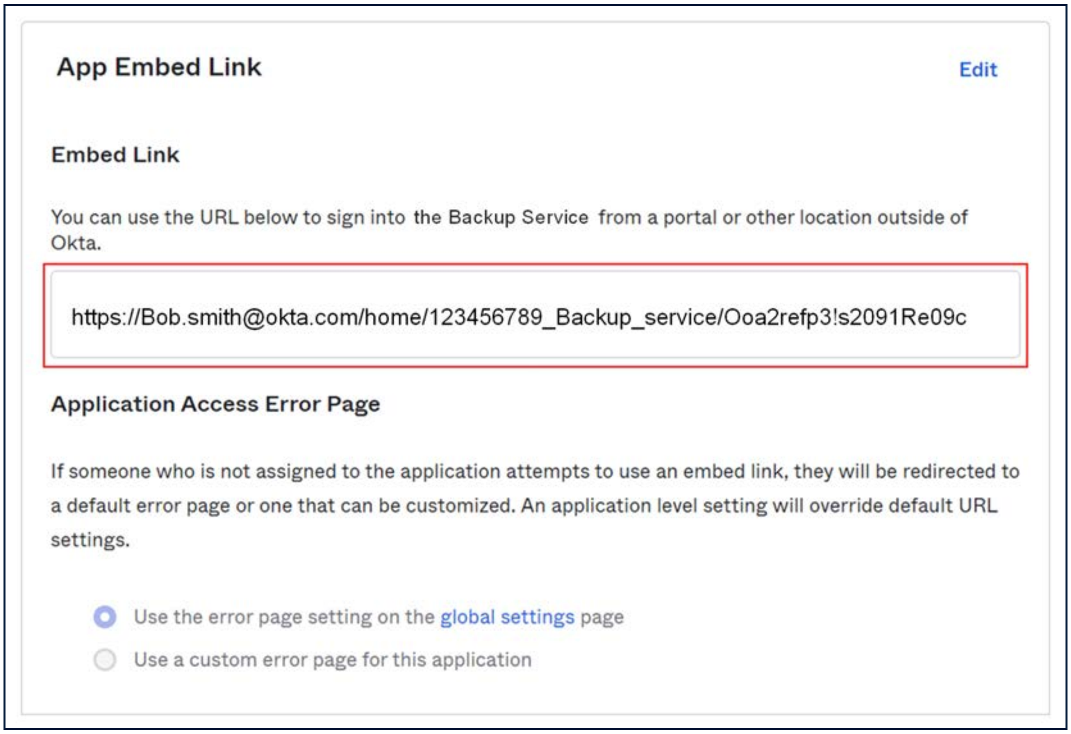
- In the Okta application, click **Applications > Applications > Browse App Catalog**.



- In the search bar, enter our backup service.

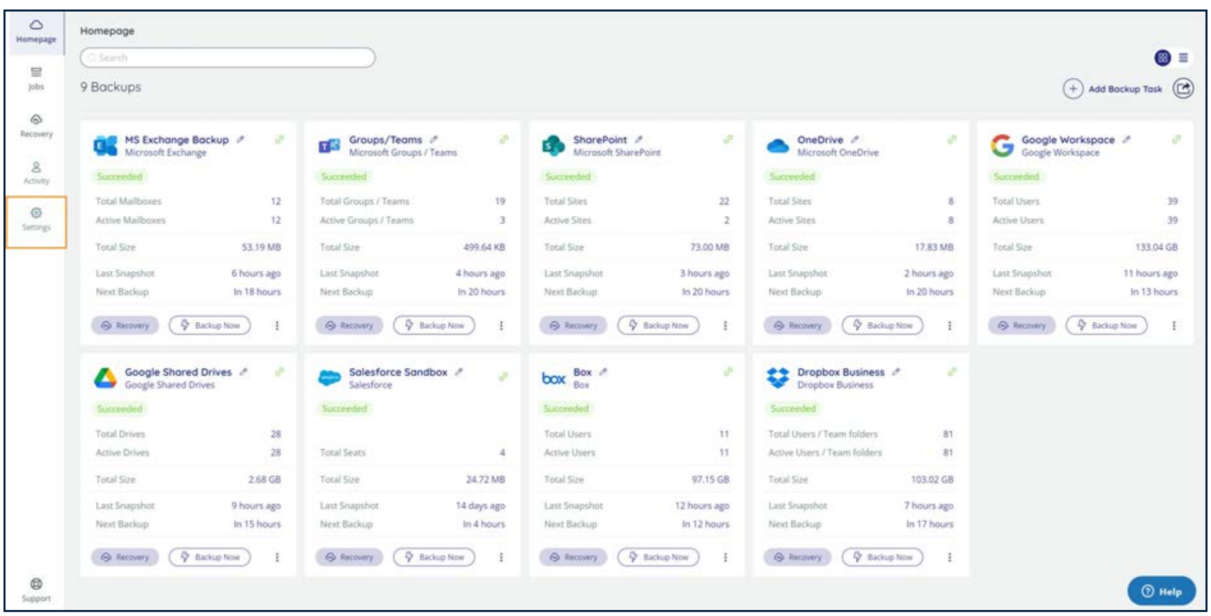


- Click the arrow next to Backup Service SAML, and **Assign to Users** or **Assign to Groups**.
- Click Backup Service SAML, and on the next page, click the **General** tab.
- Scroll down until you see the **App Embed Link** section. Copy the URL that is displayed - you will need this to set up Okta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

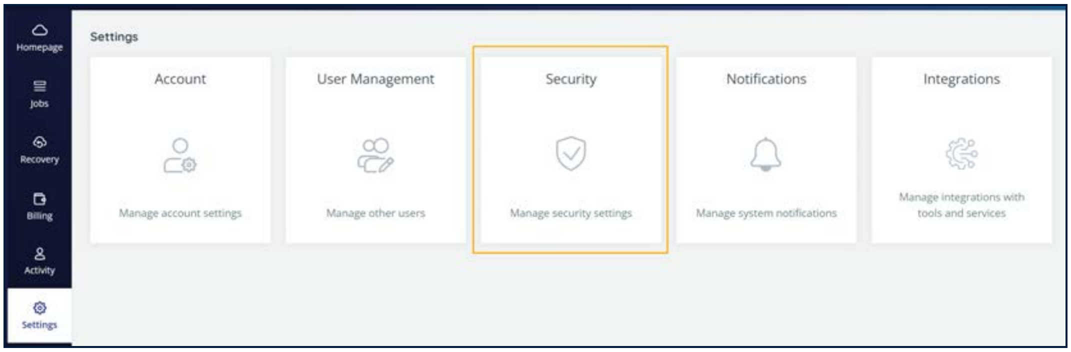


7.4.3.2 Setting Up Okta in our Backup Service Application

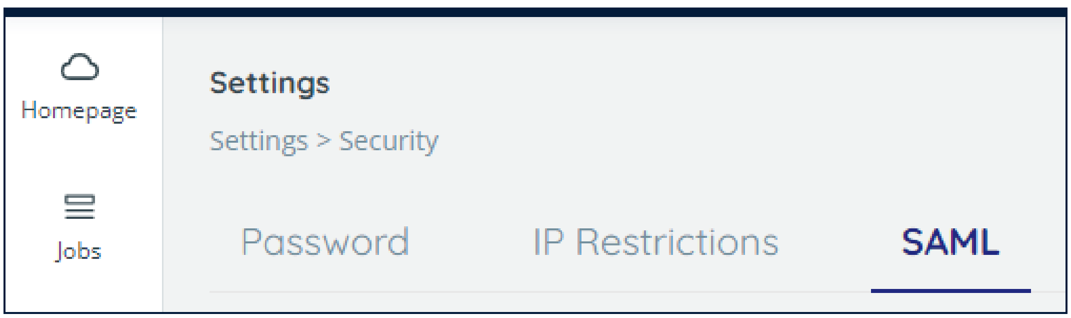
1. From the Homepage, click **Settings** in the Navigation panel.



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

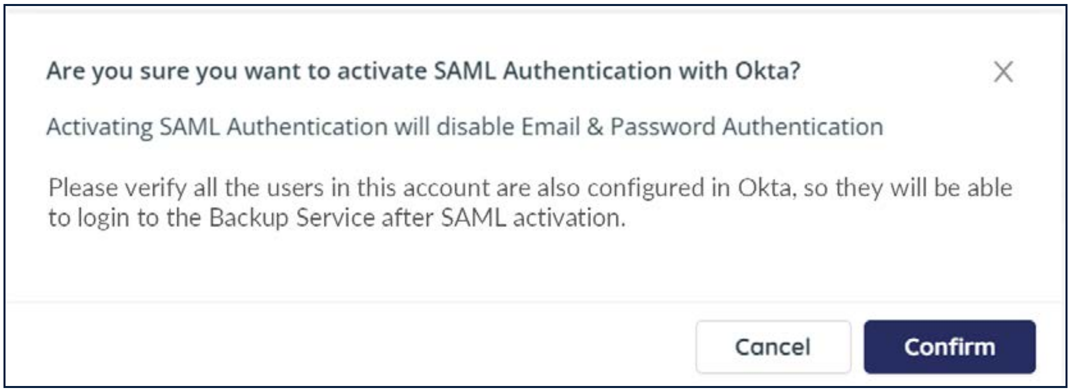


3. Click the **SAML** tab.

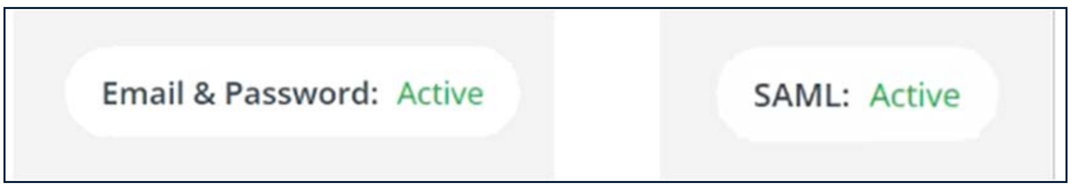


4. Paste the URL that you copied from the Okta site.

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.

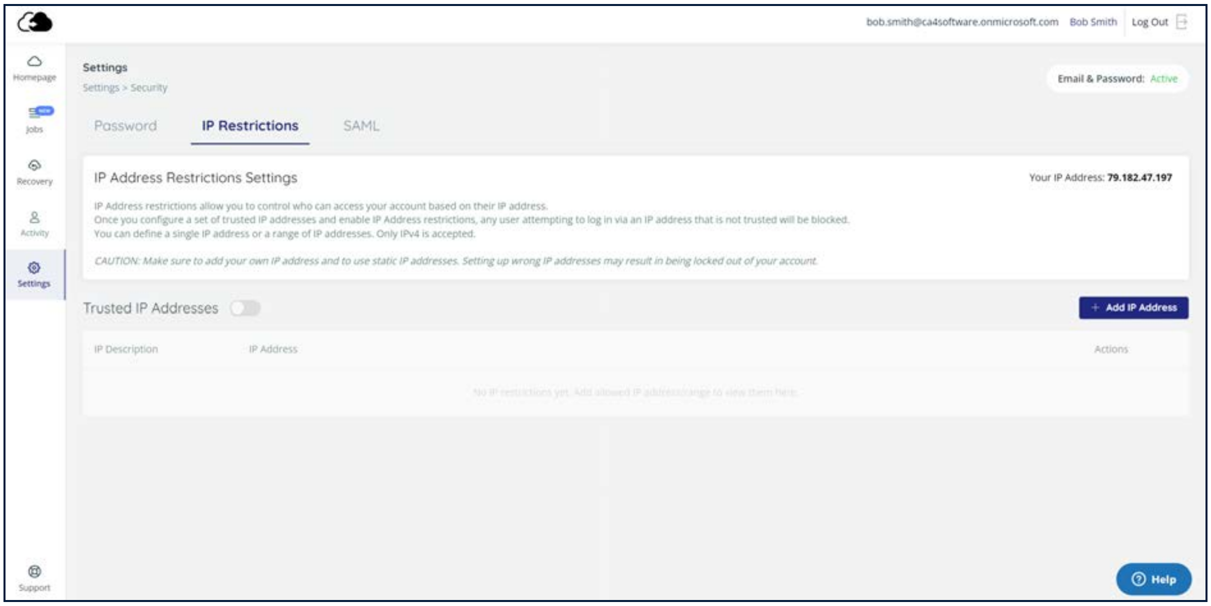
Setting Up IP Restrictions

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

> **IMPORTANT!**

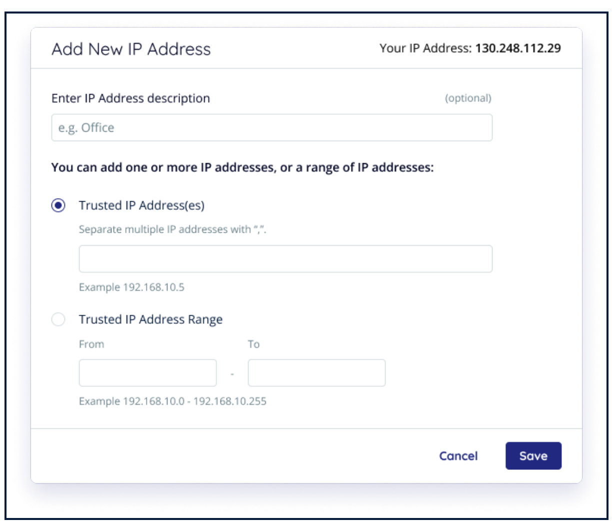
> It is strongly recommended to use this feature only if you have a static IP address, to prevent users from being locked out.

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

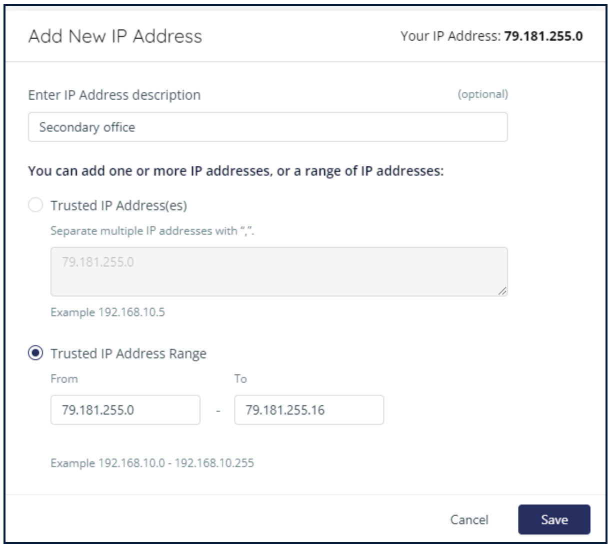


2. Click **+ Add IP Address.**
3. Enter one or more IP addresses:

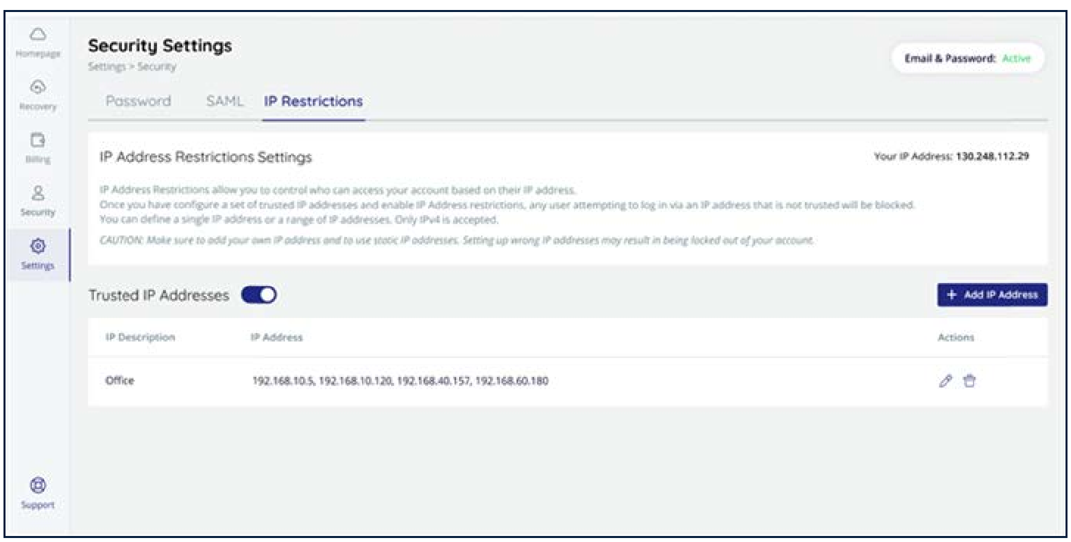
    a. Enter individual addresses separated by commas, and an optional description.



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.



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



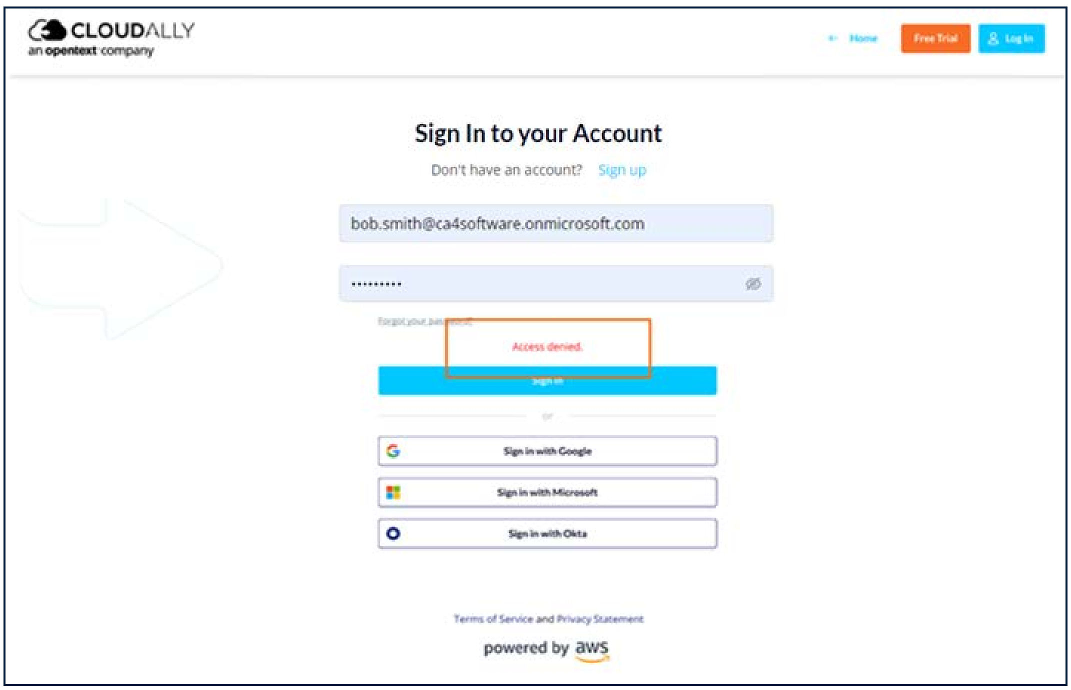
You can edit your list of addresses by clicking the pencil icon, or delete ones that you no longer want on your trusted list by clicking the trash icon.

> **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:



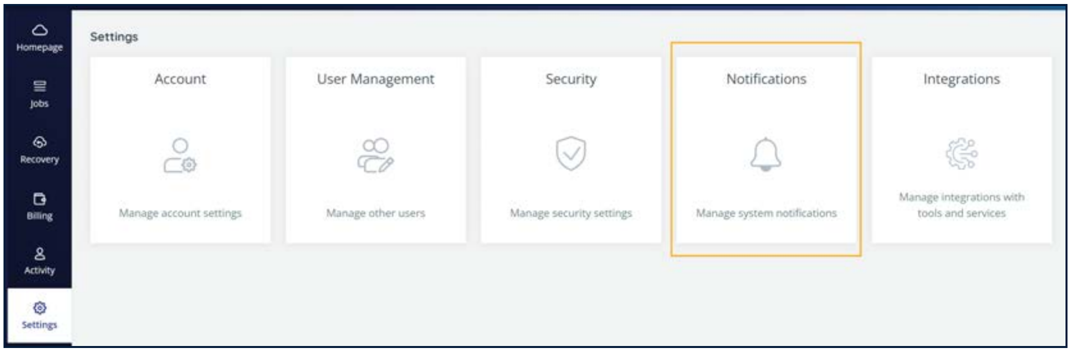
7.4.5 Email Notifications

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.

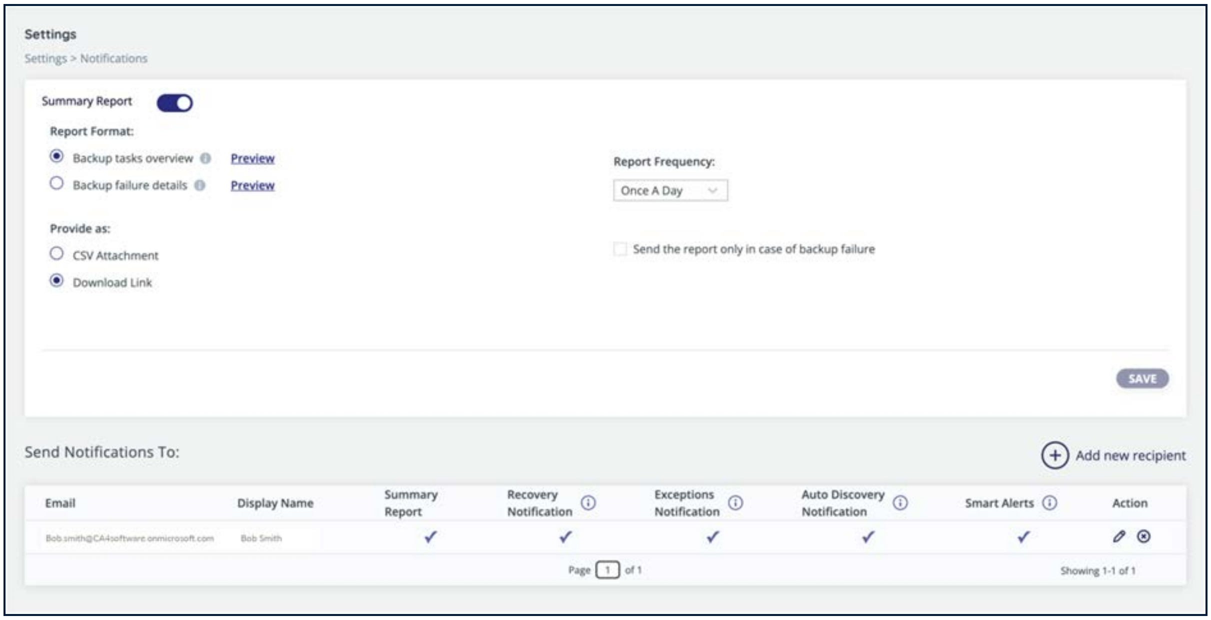
7.5 Notifications Settings

This menu option enables you to manage your system notifications.

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



The following screen will appear:



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

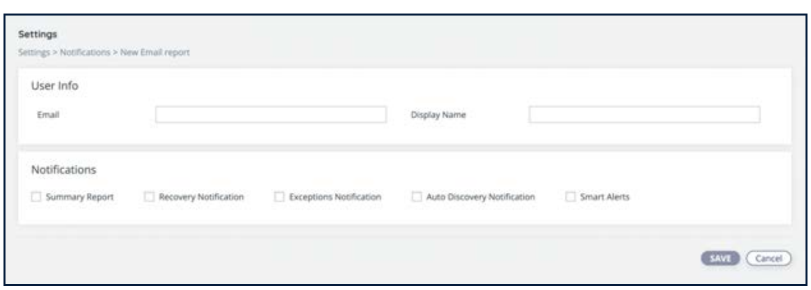
- Report Format: Backup tasks overview vs. backup failure details
- CSV Attachment vs. Download Link
- Report Frequency: daily, weekly or monthly
- Send the report only in case of backup failure

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 - This notification is sent both when there are backup errors and integration errors. (For integration information, see "Managing Your Account " on page 66.)

    > **Note:** If no one is configured to receive Exception Notifications, then they will be sent to the Primary account user.

    d. Auto Discovery Notification
    e. Smart Alerts
4. Click **SAVE** to create the new recipient.



7.6 Integrations

The Integrations page displays all of the available integrations to external services and systems, with an option to connect either as a self-service, or by calling Support and providing additional details.

The following types of integrations may be configured on this screen:

- SIEM (Security Information and Event Management)
- RMM (Remote Monitoring and Management /PSA (Professional Services Automation)

7.6.1 Splunk

The first available SIEM integration is with Splunk, using the Splunk HTTP Event Collector (HEC).

Versions Supported:

7.6.2 Which Events are Sent to Splunk?

You can choose to send one or more of the following to Splunk:

> **Note:** Our backup service sends events to Splunk periodically, approximately every 10 minutes.

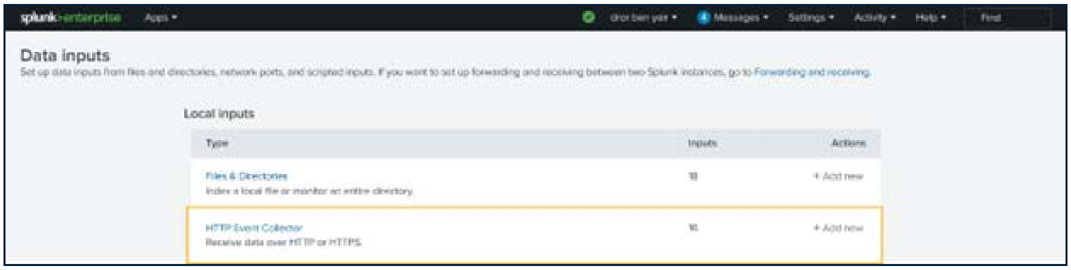
- Customers' activity events, such as backups and restores
- Customers' Security Audit logs (see " Security Audit" on page 69)

7.6.3 Pre-requisite: Setting Up Your Splunk Account

Before you can connect your backup account to Splunk, you first need to establish an account with Splunk and configure the Splunk HTTP Event Collector.

Perform the following steps in the Splunk Admin Console.

1. Navigate to **Settings>Data Inputs>HTTP Event Collector**.

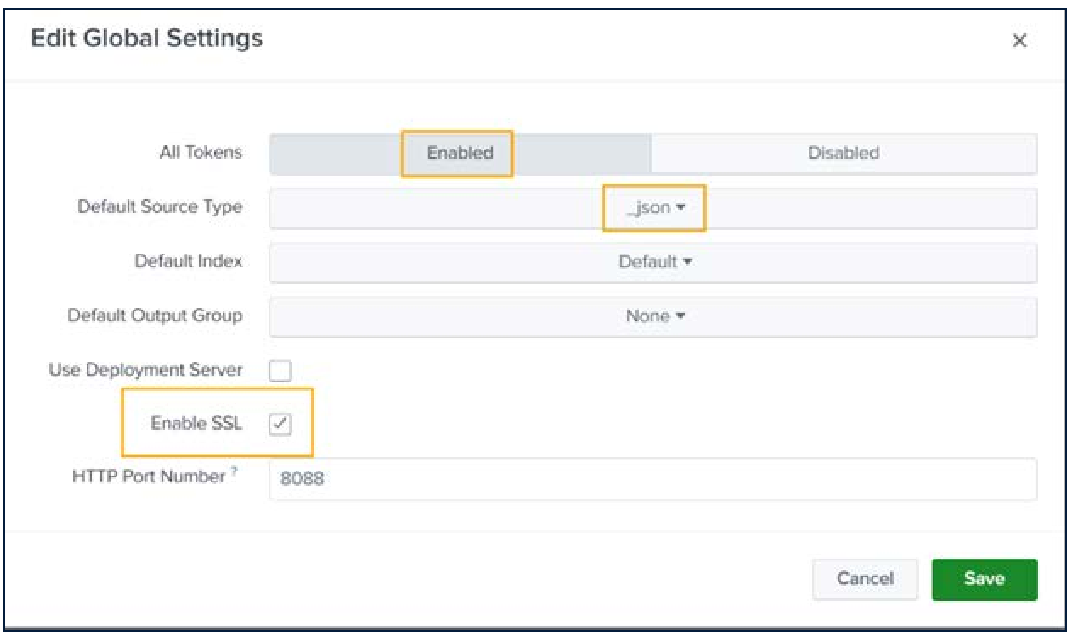


2. Under the Global Settings option:

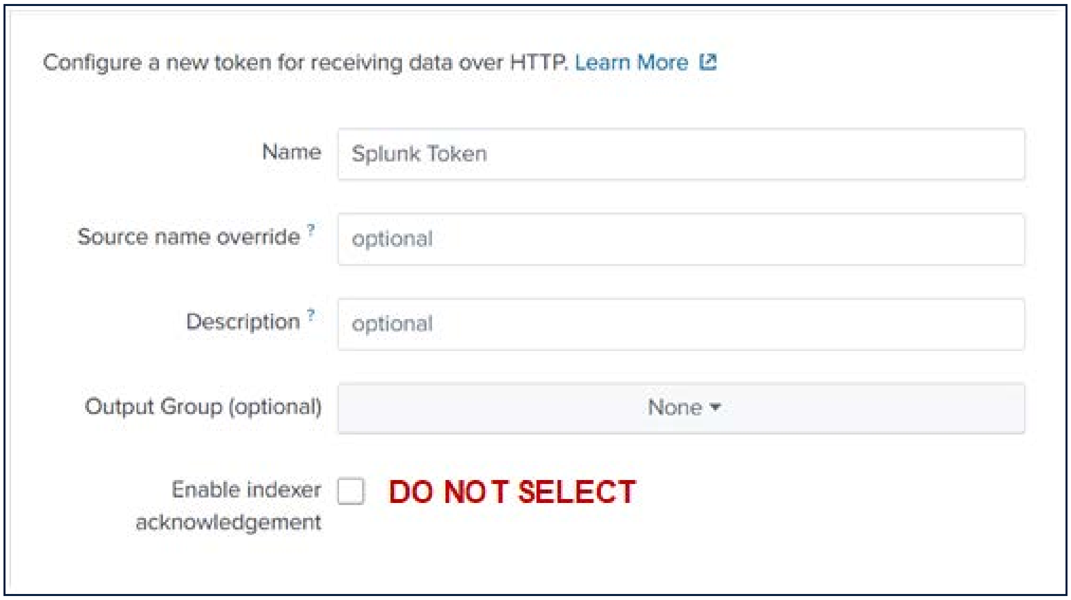
   a. Enable the HTTP Event Collector by setting All Tokens to **Enabled**.

   b. Choose **json** as default source type.

   c. Check **Enable SSL**.



3. Under the New Token option, create a new token and copy the value - it will be used in the backup servicePortal.



IMPORTANT NOTE: Do NOT check "Enable indexer Acknowledgment".

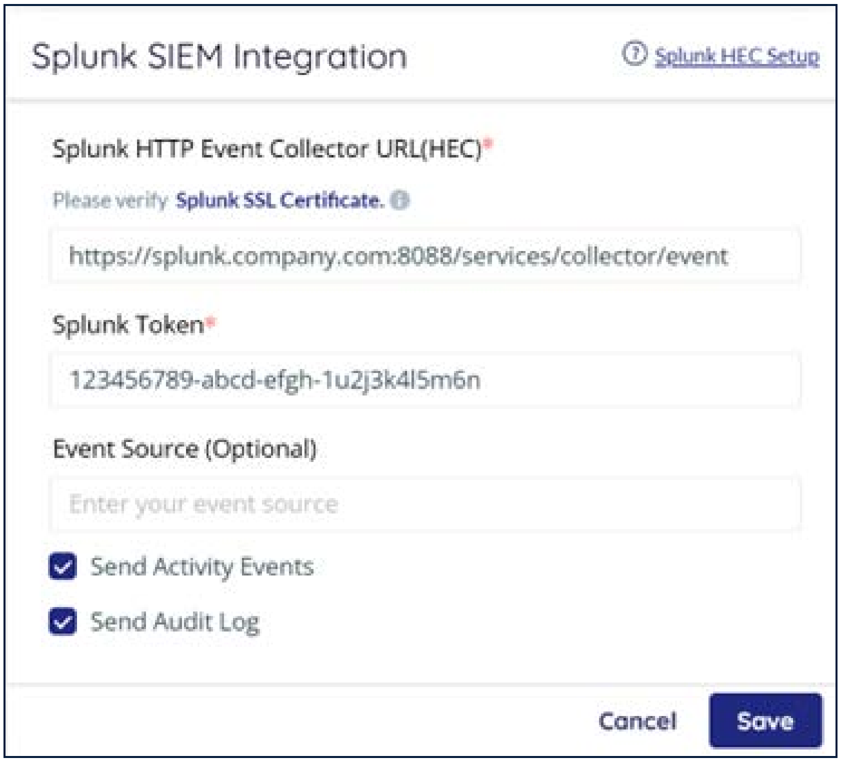
4. Find Your HEC URL.

The standard form for the HEC URL varies, depending on the Splunk software type you have. Find the standard form on this page: [Set up and use HTTP Event Collector in Splunk Web]().

5. Verify that you have set up an SSL certificate issued by a commonly accepted certificate authority (CA) on the Splunk HEC endpoint.

7.6.4 Setting Up Splunk in the Portal

1. From the navigation pane, click **Settings > SIEM**.
2. Click **Splunk > Connect**. Complete the fields on the following screen:
   a. Enter the Splunk HTTP Event Collector URL.
   b. Paste the token value that you copied into the Splunk Token field.
   c. Optional: Add the Event Source, which is the override value to assign to the event data.

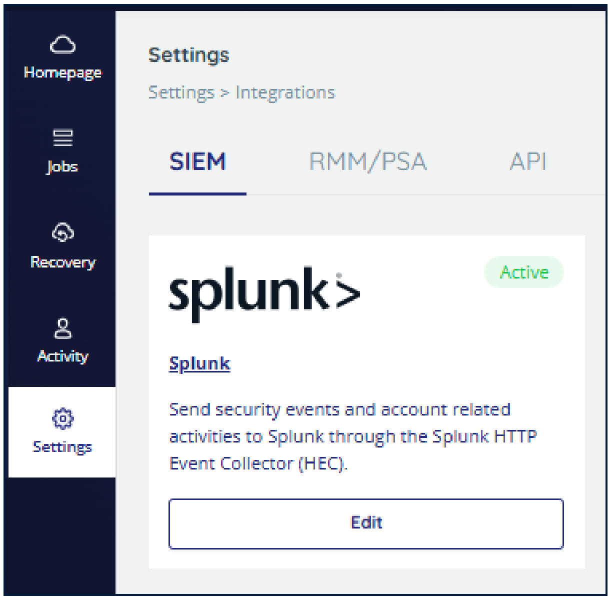


3. By default, there are 2 options at the bottom that are selected. You can de-select any that are not relevant for you:

    a. Send customer activity events

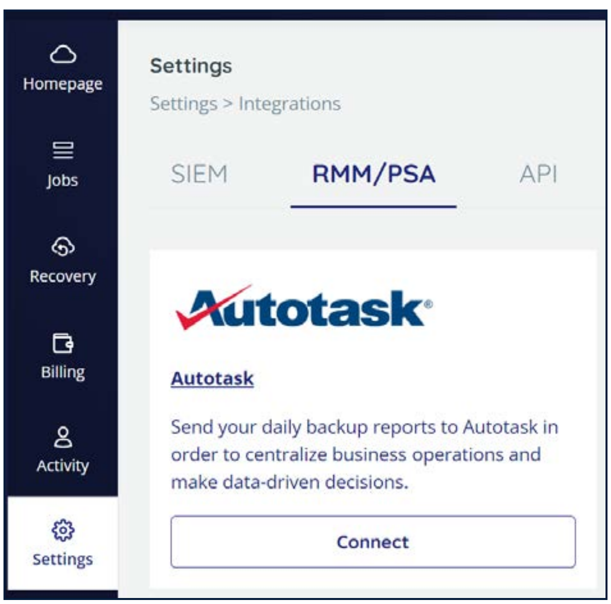
    b. Send customer audit log

4. Click **Save**. The Splunk tile will now be Active.
5. To delete the integration, click **Edit > Delete**.



7.6.5 RMM/PSA

The RMM (Remote Monitoring and Management) and PSA (Professional Services Automation) page enables you to connect to Autotask.



Autotask is a PSA platform that provides complete visibility over your business with features like dashboards, sales, CRM, assets, inventory, and billing.

Once you have set up your account with Autotask, open a support ticket. Send us:

- Your Autotask ID
- Your Autotask Password
- The email address you'd like your reports to be sent to.

Once the support representative has enabled Autotask, we will send any backup task failure reports to the email address provided, starting from the next backup cycle.

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.

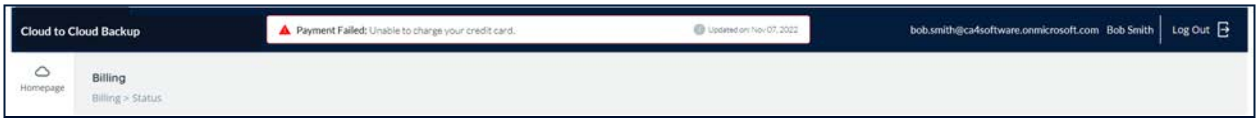
To finalize your subscription, enter your credit card details and general billing information, and then click **Subscribe**.

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.

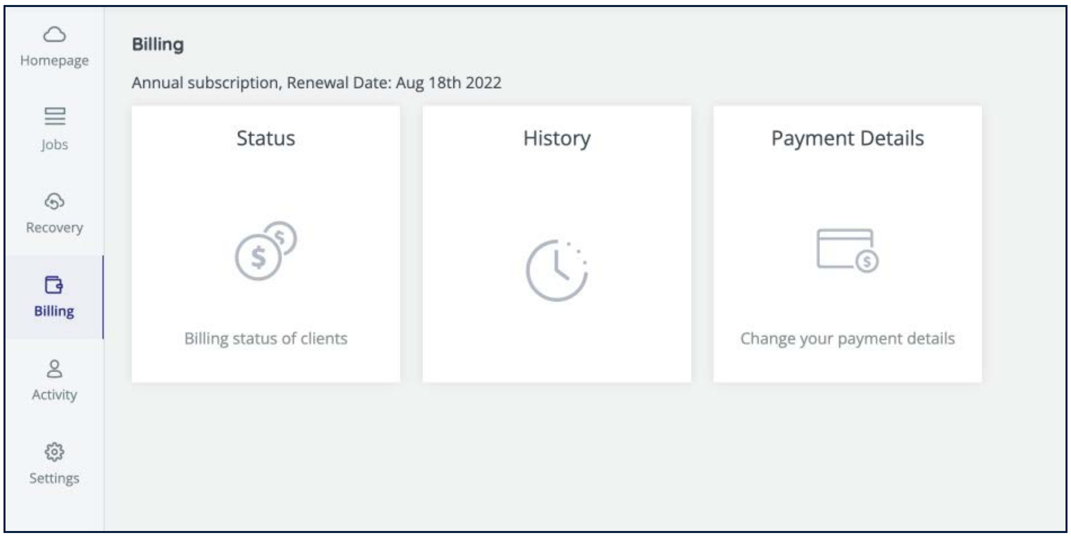
After the initial payment, our backup service will send you an invoice 30 days before your payment is due, in 11 months. You will also be reminded that your annual subscription is due online:

> **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.

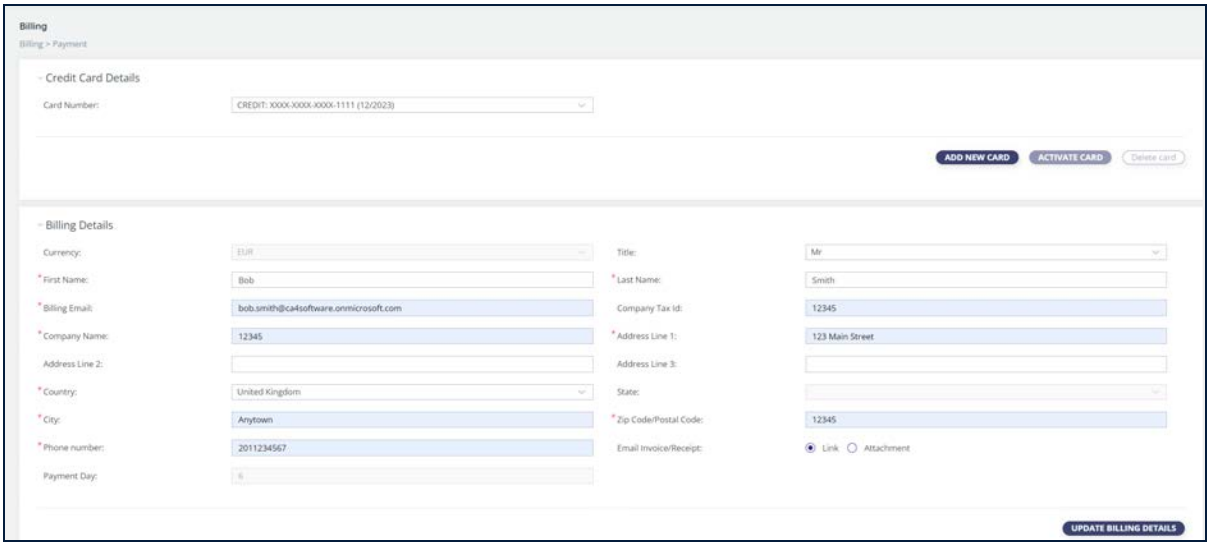
8.2 Payment Details



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

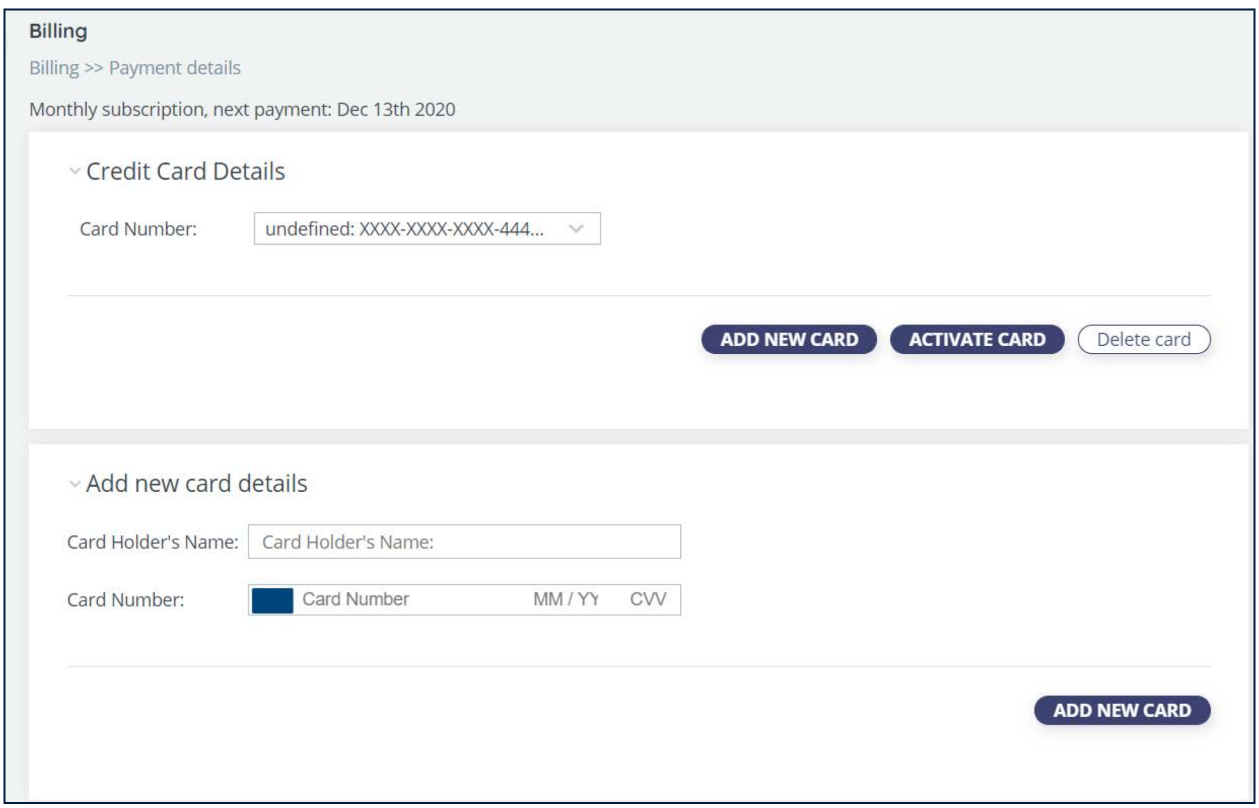
8.2.1 Monthly Subscriptions

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



8.2.1.1 Add New Card

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



To create a new payment method:

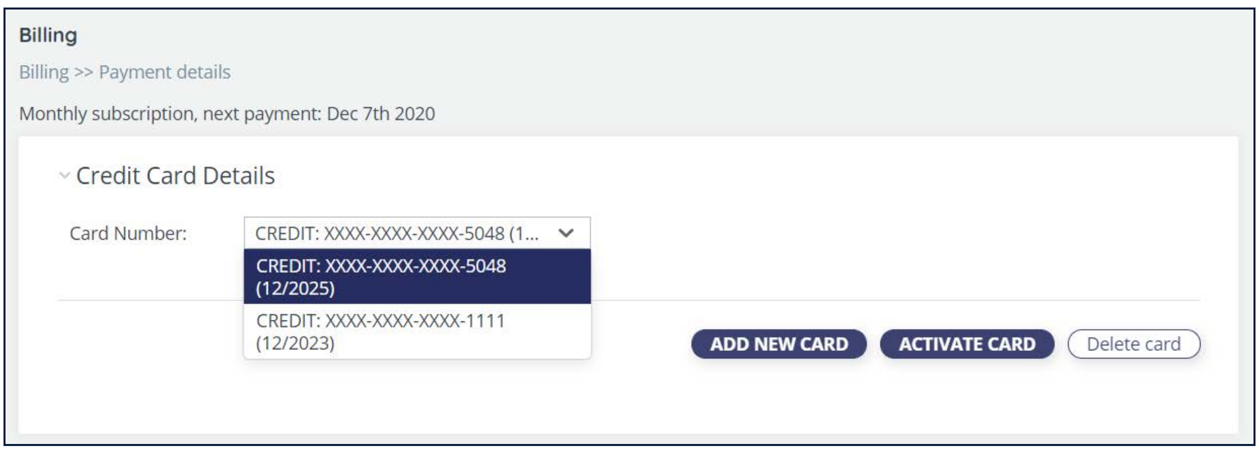
1. Click **ADD NEW CARD.**
2. Enter the card details such as Card Number, CVV, Card holder's name, and card expiry date.
3. Click **ADD NEW CARD**.

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

8.2.1.2 Change Payment Method

To change your existing payment method:

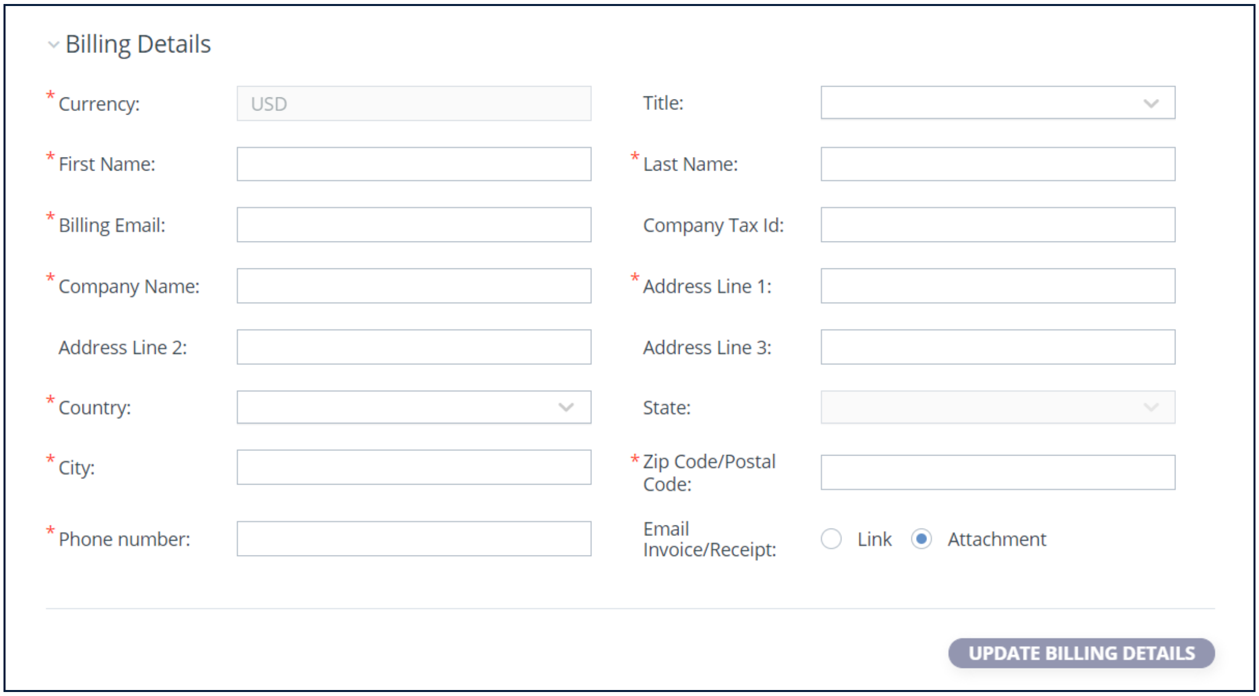
1. Click the drop-down list and select the payment method from the Cards Number drop-down list.
2. Click the payment method from the list (the screen shot below depicts choosing a different credit card).
3. Click **ACTIVATE CARD** to set the selected card as the preferred payment method.



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

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

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



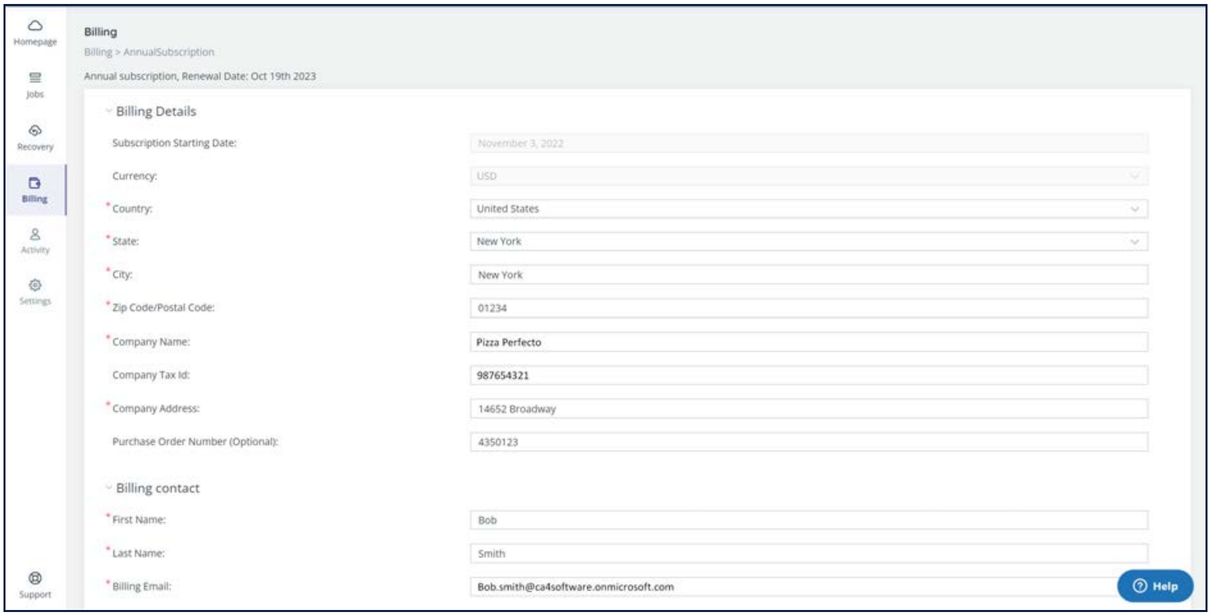
5. Update the required fields. The fields marked with the * symbol are mandatory.
6. Click **UPDATE BILLING DETAILS**.
7. The updates are saved.

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

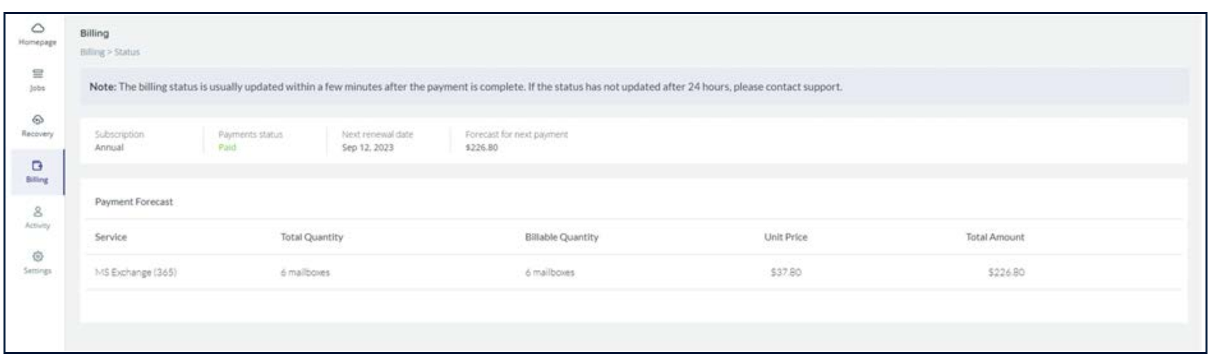
If you have chosen an annual payment plan, you can update your billing details here. When you are done, click **SAVE**.



8.3 Billing Status

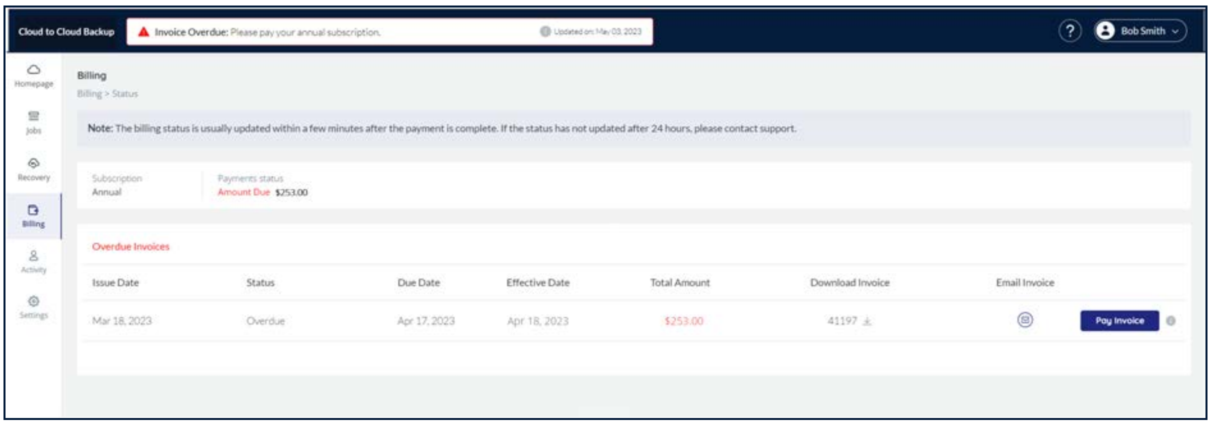
Annual Subscription

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.

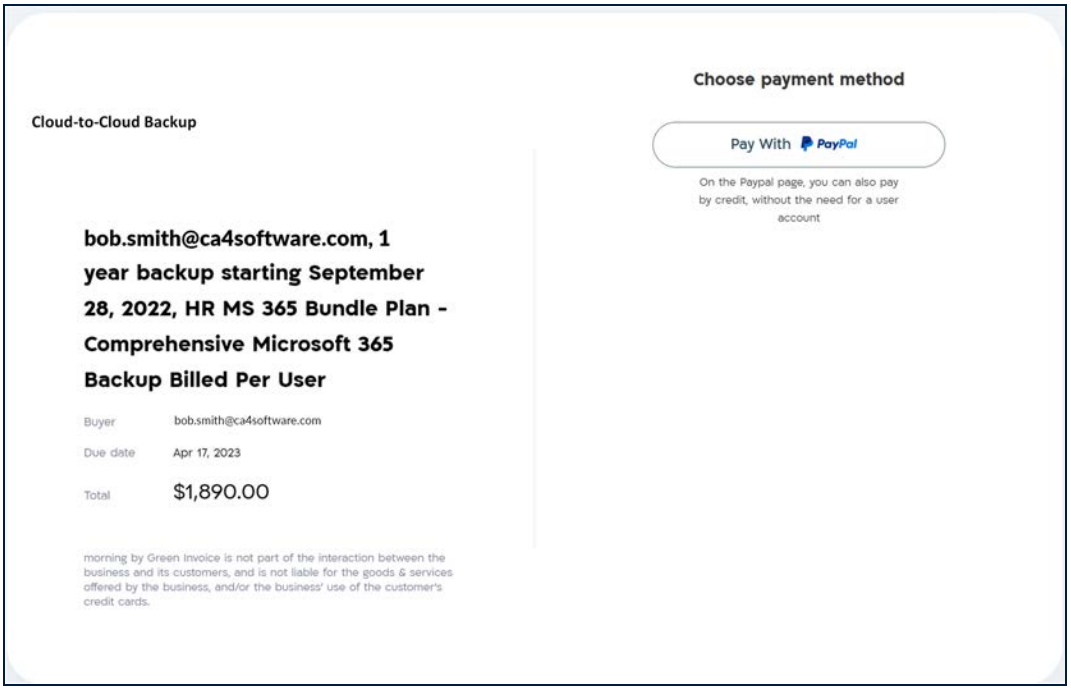


When your subscription amount becomes due, the Billing Status page displays the following information:

- **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.

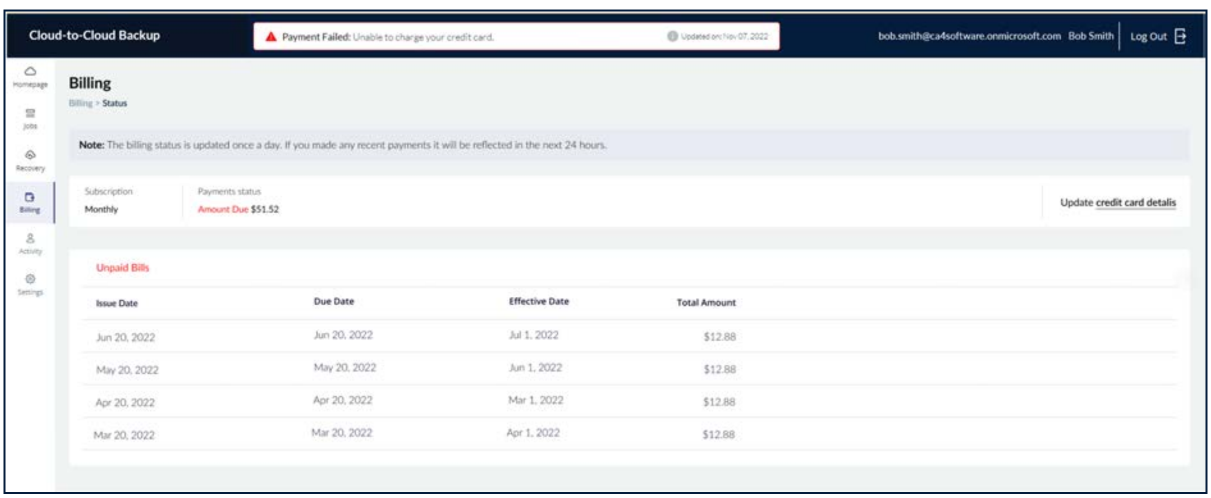


You can click **Pay Invoice**, and you will be directed to the following screen, where you can pay your invoice via PayPal or by credit card:



Monthly

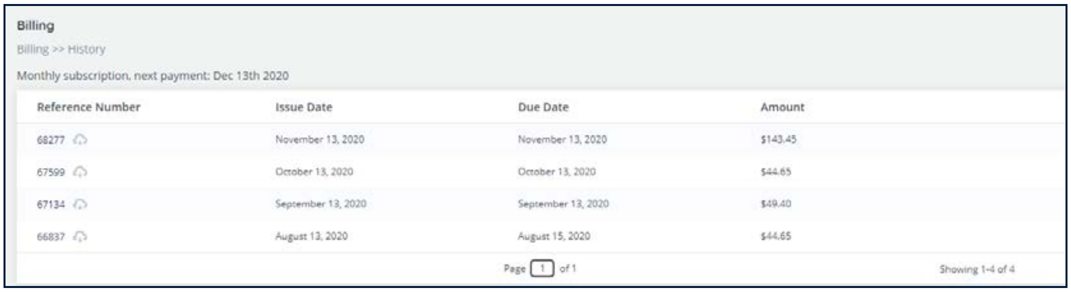
Similarly, if there was a problem with your monthly subscription payment, the status will look as follows:



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

8.4 History

This page displays the history of payments.



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

26 April 2023

Invoice / Receipt 51646

Certified Copy

Invoice / Receipt for admin@pizza-perfecto.com, 1 year backup starting April 22, 2021, GBP

QTY	Description	Price	Total
70	Dropbox 696.56 GB	16.25 GBP	1,137.50 GBP
		Subtotal	1,137.50 GBP
		VAT 0%	0.00 GBP
		Total payable	**1,137.50 GBP**

Payments Details

Type	Description	Date	Amount
PayPal	Account 12345678 / Transaction # 987654321	26 April 2021	1,137.50 GBP

Total 1,137,50 GBP

Invoice / Receipt for Proforma Invoice 11392
Paid with PayPal
Merchant Account: KQMTW2PHR5CUG

Signature: *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.