User Guide

Salesforce Backup & Recovery

salesforce

SF UG WL-CE 24.4.1

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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
- 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.

SaaS Data Protection Platform		Free Trial
	Sign In to your Account	
	Email	
	Password gb	
	formet.ukut.ukuteenet?	
	Sign In	
	Sign in with Microsoft	

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

Comprehensive. Proven. Secure.	Sign up for a 14	Day Free Trial
Protect your Cloud Data for FREE with CloudAlly	First Name	Last Name
2 14 Day Free Trial	Email	
S Minutes Setup No Credit Card Required	Password #	Confirm Password db
Get proven and secure data protection with the Pioneers of SaaS backup.	EU (Ireland)	
🛤 🚢 🜍 🜍 🥽	Sign	up
~ ~ ~ ~		
	G Sign up wit	h Google
	1 Sign up with	Microsoft
	By creating an account, you agree to our]	Terms of Use and Privacy Policy.

- 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.

Salesforce Backup and Restore User Guide Creating and Accessing Your Backup 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.

	Sign In to your Account	
bob.smith@	©ca4software.onmicrosoft.com	
Password		ģ
Forgot your pass	word?	
	Sign In	
	or	
G	Sign In with Google	
	Sign In with Microsoft	
	Contraction Office	

2. The Password Reset page will appear.

Passwo	ord Reset
To reset your the Email address	password, enter s you signed up with
Email	
R	eset
ico in	Signu

- 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.

Fill-in the new passwo	rd
New Password	Ø
Confirm New Password	Ø
Save	

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 timeconsuming, 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.

								CO Search
+ Add Backup Ta								9 Backups
Google Workspace 🥒 Google Workspace		OneDrive & Microsoft OneDrive	rePoint.	SharePoint Microsoft Sh	is de 🖉	Groups/Team Microsoft Group	Bockup 🖋 🥔	MS Exchange Microsoft Excha
eded		Succeeded		Succeeded		Succeeded		Succeeded
Jsers	8	Total Sites	22	Total Sites	19	Total Groups / Teams	12	Total Mailboxes
Users	8	Active Sites	2	Active Sites	3	Active Groups / Teams	12	Active Malboxes
ize 133.0	17.83 MB	Total Size	73.00 MB	Total Size	499.64 KB	Total Size	53.19 MB	Total Size
napshot 11 hour	2 hours ago	Last Snapshot	3 hours ago	Last Snapshot	4 hours ago	Last Snapshot	6 hours ago	Last Snapshot
Sackup In 131	In 20 hours	Next Backup	In 20 hours	Next Backup	In 20 hours	Next Backup	In 18 hours	Next Backup
ecovery 🤄 Backup Now	kup Now 1	G Recovery	Backup Now	@ Recovery	Backup Now	S Recovery	Backup Now	@ Recovery
	(z	Dropbox Business Dropbox Business	2	box Box #	indbox 🖉 🍦	Salesforce Sa Salesforce	d Drives 🤌 🥔	Google Share
		Succeeded		Succeeded		Succeeded		Succeeded
	81	Total Users / Team folders	11	Total Users			28	Total Drives
	81	Active Users / Team folders	11	Active Users	4	Total Seats	28	Active Drives
	103.02 GB	Total Size	97,15 GB	Total Size	24.72 MB	Total Size	2.68 GB	Total Size
	7 hours ago	Last Snapshot	12 hours ago	Last Snapshot	14 days ago	Last Snapshot	9 hours ago	Last Snapshot
	In 17 hours	Next Backup	In 12 hours	Next Backup	In 4 hours	Next Backup	In 15 hours	Next Backup
		Change (Base		O Burney (Review Now 1	O Bernard (D	Reduction 1	Daman D

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

The following page is displayed:



3. Click Salesforce. The following screen appears.

Enter your admin details	How to enable API access
* Backup Name	
Enter your backup name	
You will be redirected to Salesforce for authentication system.	on. Your details will not be saved in CloudAlly
Production backup	Sandbox backup
Cancel	Authenticate in Salesforce

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

Homepage	SF / Homepage > SF			
)obs	Connected @			Seats 7
© Recovery		Status 🥝 Success Size 28	8.26 MB Last Backup 37 minutes	ago Backup actions 💼 🖗 🖶
8 Activity	Backup Settings The automatic additionuldeletion of an account, site, domain, table or drive can affect your monthly or annual billing amount	Backway Dubbaseday	 Automics Deced 	
	Daily API Usage Limit 75%	Europe Ireland:	V Unimited	
	(ed. mone in cont in. Sentin 🙆	Backup Frequency	Backup Hour (UTC)	
		Daily	~ 21:00	

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

3.2 Configuring Backup Settings

To access the configuration screen, click Edit .

O Homepage	SF / 3				
) jobs	Connected #				Seats 7
(G) Recovery			Status 🧭 Success Size 28.26 MB	Last Backup an hour ago	Backup actions 🛗 🖓 🖶
8 Activity	Backup Settings The automatic addition/deletion of an account, site, domain, table or drive can affect your monthly or annual billing amount				
Settings	Daily API Usage Limit 75%	Backup Datacente	0	Retention Period	0
		Europe (Instand)			
	index all state for Search ()	Backup Frequency		Backup Hour (UTC)	
	6	Daily		21:00	· · · · ·
	•• Compore 🔃 Replicate 🗘 Smart Alerts 🔘 How it works?				Concel Sove

- 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 <u>"Comparing,</u> Replicating, and Setting Smart Alerts."

Are you sure you want to add/remove Limited Access tag?	×
Only the primary administrator of the account has permission to browse recover data that has a Limited Access tag.	and
Cancel	Yes

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.

23	•	SF # Saledore Sarcented	Total @ 7	Total Size 28.64 MB	Last Snapshot 11 hours ago	Next Backup In 13 hours	Bach-steel
							Pause Backup

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.

9 Backups								(\pm)	Add Backup Tas
MS Exchange Bo Microsoft Exchange	ckup / /	Groups/Teams Microsoft Groups /	e e Teams	SharePoint # Microsoft SharePoint		OneDrive // Microsoft OneDrive	2	G Google Works	space /
Succeeded		Succeeded		Succeeded		Successfed		Succeeded	
Total Malboxes	12	Total Groups / Teams	19	Total Stes	22	Total Sites		Total Users	
Active Maliboxes	12	Active Groups / Teams	3	Active Sites	2	Active Sites		Active Users	
Total Size	53.19 MB	Total Size	499.64 KB	Total Size	73.00 MB	Total Size	17.83 MB	Total Size	133.0
Last Snapshot	6 hours ago	Last Snapshot	4 hours ago	Last Snapshot	3 hours ago	Last Snapshor	2 hours ago	Last Snapshot	11 hour
Nest Backup	In 18 hours	Next Backup	In 20 hours	Next Backup	In 20 hours	Next Backup	In 20 hours	Next Backup	In 13
(G Recovery) (Q B)	chup Now I	(🖗 Recovery) (🖗 So	chug Now i	G lacenty 🖓 Ea	hup haw j	(Recovery) (V to	chup New I	(@ Recovery)	Backup Now
Google Shared I	orives at a	Salesforce Sand	box / 🥚		1	Cropbox Busines	11 1		
Succeeded		Succeeded		Succeeded		Succession			
Total Drives	28			Total Users		Total Users / Team folders	81		
Active Drives	28	Total Seats	4	Active Users	11	Active Users / Team folder	s 81		
Total Size	2.68 GB	Total Size	24.72 MB	Total Size	97.15 GB	Total Sze	103.02 GB		
Last Snapshot	9 hours ago	Last Snapshot	14 days ago	Last Snapshot	12 hours ago	Last Snapshot	7 hours ago		
Next Backup	in 15 hours	Next Backup	In 4 hours	Next Backup	In 12 hours	Next Backup	in 17 hours		
and the second s									

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.

Comment									
9 Backups								(+)	Add Backup Task
MS Exchange B Microsoft Exchang	ockup 🖉 🦉	Groups/Teams Microsoft Groups	s / 🦉	SharePoint & Microsoft ShareP	Point	OneDrive & Microsoft OneDrive	<i></i>	G Google Work Google Worksp	spoce 🥒
Succeeded		Succeeded		Succeeded		Succeeded		Succeeded	
Total Mailboxes	12	Total Groups / Teams	19	Total Sites	22	Total Sites	8	Total Users	
Active Mailboxes	12	Active Groups / Teams	3	Active Sites	2	Active Sites	8	Active Users	
Total Size	53.19 MB	Total Size	499.64 KB	Total Size	73.00 MB	Total Size	17.83 MB	Total Size	133.0
Last Snapshot	6 hours ago	Last Snapshot	4 hours ago	Last Snapshot	3 hours ago	Last Snapshot	2 hours ago	Last Snapshot	11 hours
Next Backup	In 18 hours	Next Backup	In 20 hours	Next Backup	In 20 hours	Next Backup	In 20 hours	Next Backup	in 13 h
(Pecovery) (7 5	ackup Now i	Recovery	Backup Now	Recovery	Backup Now E	@ Recovery 2 Back	up Now 1	S Recovery	Backup Now
Google Shared Google Shared Dri	Drives & @	Salesforce Sar Salesforce	ndbox 🖉 🍦	box Box #	12	Dropbox Business Dropbox Business	2 - 2		
Succeeded		Succeeded		Succeeded		Succeeded			
Total Drives	28			Total Users	11	Total Users / Team folders	81		
Active Drives	28	Total Seats	4	Active Users	11	Active Users / Team folders	81		
Total Size	2.68 GB	Total Size	24.72 MB	Total Size	97,15 GB	Total Size	103.02 GB		
Last Snapshot	9 hours ago	Last Snapshot	14 days ago	Last Snapshot	12 hours ago	Last Snapshot	7 hours ago		
Next Backup	In 15 hours	Next Backup	In 4 hours	Next Backup	In 12 hours	Next Backup	In 17 hours		
D Dunnen (D) a	and	Consume (D)	Participation T	Consume (D	Rachun Now	A Reman	in Now		

- 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 <u>Configuring Backup</u> <u>Settings.</u>

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.

esto	re & Download	
Active	Backup Accounts	
Searc	h	
т	Microsoft Groups / Teams 1 group / team test	
0	Microsoft OneDrive 18 sites Test	
36	Microsoft Exchange 30 accounts Test	
xoc	Box & accounts Test	
G	Google Workspace 3 google accounts cloudrein.com	
•	Microsoft SharePoint 13 sites Test	

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



Salesforce Backup and Restore User Guide Recovering Your Backed Up Data

	Please select your preferred o	hoice for restore	
ry	● Via Snapshot ∨		
·	A snapshot is a copy of your online a of your data, or drill down into the sn Data changed from	oplication data taken at a specific date and time. Use this o apshot to recover a particular item.	ption to recover all
s	Select date	v	
	То		
	Select date	~	

- 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.

Recovering Your Backed Up Data

~			
 *>**** ⊒	Restore or download from SF arch	ive	
bs.	From the archive list below select the relevant items,	then click on "restore" to perform a restore directly to the online servi	ce, or "download" to create a zip extract of the data.
a wery	DATE	SERVICE	ACTION
1.50	Oct 19 2022 12:07 AM	Salesforce	٩
iny.	C Oct 18 2022 03:50 PM	Salesforce	٩
npi l	View 1 - 2 of 2	\ll $< Page 1 of 1 > >$	

- 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.

() Homepage III jg	Res	tore the arc	or download Salesforce from bob.smith@ca4softarchived at Sep 25, 2024 Mark 21 Houghest Stations hive list below select the relevant items, then click on "restore" to perform a restore directly to the online service, or "download"	to create a zip extract of the data.
© Recovery	17	5 Total Search by	Objects Name	Object Type v Action V
Billing &		Туре	Name	Data
©		0	Motoria AccountCartacSilation	Metadata
Sample		D	ActiveFeaturicLonseMetric ActiveFeaturic	

5. Once you select an item, the Action menu becomes available. Choose either Exportor 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.

Please confirm the restore request X
You are about to restore items from the archive of bob.smith@ca4software.onmicrosoft.com
Please ensure that the user that authenticated your backup task in our system has full admin permissions in Salesforce.
Please temporary disable workflows, triggers and validation rules in Salesforce.
Job Label (optional) () Maximum 50 characters
Enter Job Label
Restore to *
bob.smith@ca4software.onmicrosoft.com
Activate inactive users 📵
Disable triggers in restore 1
* You can restore the data to a different organization
Production
Sandbox
Restore mode for identical records
Restore will overwrite existing live data.
Existing data will be bypassed and not restored.
O Existing data will be duplicated.
A notification Email with a report will be sent to you upon completion.
Yes No

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 <u>"Tracking</u> 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 ite You are about to export ite rkhanafiev@cloudrein.co	xport request ems from the archive of m.anonym
Job Label (optional) 🕕	Maximum 50 characters
Enter Job Label	
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	ОК

2. Click the drop-down list and select one of the following 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.
- Or, you can check the *Jobs* page. (See <u>"Tracking Recovery Tasks on the Jobs</u> <u>Page."</u>) When the task is completed, the **Download Results** button will be active.

SF Salesforce sgerasmov@cloudally.com		Export			Succeeded
Started at: Oct 19 2022 at 03-25 PM	Backup Date: Dig 19 2022 at 12:07 AM	Initiator: bob anith@caleoftware.ormicrosoft	Destination: Direct Download	Total Items: 37515	Size 23.79 MB
Concel				Dow	whood Results View Log

				3
O Homepage	Jobs jobs > Deveload Filet3		Recent Downloads	×
) jobs	55		Show all downloads	ß
0	Bob.smith@ca4software.onmicrosoft.com			
necovery 0	File Name	© Size	\$	Actions
Acuty	Bob.smith+ca4software.onmicrosoft_Salesforce_20221910_1.zip	23.79 MB	[0
(i) Settings				

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.

lease select your preferred choic	ce for restore
Via Snapshot 🔺 A snapshot is a copy of your online applica	ation data taken at a specific date and time. Use this option to recover all of your data, or drill down into the snapshot to recover a particular item.
	20년 일 전화 전 역사 전 20년 11년 12년 12년 12년 12년 21년 12년 21년 12년 12
Via Item Search v Use this option to search all the backup sn Search phrase	apshots of this service for a particular keyword or name. To search for an exact phrase, including an email address, use double-quotes (1). For example: "user@company.com" or "important update".
Search for	
Table/Metadata type	
Account	~
Created By ID	
Enter Salesforce User ID	
Updated By ID	
Enter Salesforce User ID	
By unique Salesforce Record (D(s)	
Example: 50030000008cul , 500300000	OBGUIQAA
Date from	
Select date	
Date to	
Select date	
Is Deleted	

- 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 <u>Restore</u> or <u>Export/Download</u> 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.

O Homepage	Activity Activity > Sy	stem activity		
⊒ Jobs	19 Oct	2022 - 19 Oct 2022	2 🗄 Activity (1) 🗸 Servi	ce v (Status v)
Recovery	Ex	port O 19 Oct	2022 - 19 Oct 2022 O SF O	Bob.smith@ca4software.
Activity	Activ	🧭 Export		Service
 Settings 	0:	Snapshot Date: Number of Records: Export Destination:	Oct 19 2022 12:07 AM 37515 Direct Download	-
		Initiator:	bob.smith@ca4sottware.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 object

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

9 Backups								Œ	Add Bockup
MS Exchange Backup Microsoft Exchange		Groups/Teams Microsoft Groups	/ ams	SharePoint # Microsoft ShareP	er foint	OneDrive Microsoft OneDrive	a.	G Google Works	kspoce 🥒
Succeeded		Succeeded		Succeeded		Succeeded		Succeeded	
Total Mailboxes Active Mailboxes	12 12	Total Groups / Teams Active Groups / Teams	19 3	Total Sites Active Sites	22 2	Total Sites Active Sites	8 8	Total Users Active Users	
Total Size	53.19 MB	Total Size	499.64 KB	Total Size	73.00 MB	Total Size	17.83 MB	Total Size	1
Last Snapshot Next Backup	6 hours ago In 18 hours	Last Snapshot Next Backup	4 hours ago In 20 hours	Last Snapshot Next Backup	3 hours ago In 20 hours	Last Snapshot Next Backup	2 hours ago In 20 hours	Last Snapshot Next Backup	11 h In
(Becovery) (Backup)	Now I	(Recovery) (P B	ackup Now]	(Recovery 9	Backup Now I	(Recovery) (Back	up Now 1	A Recovery	Backup Now
Google Shared Drive	50.0	Salesforce Sand Salesforce	dbox 🖉 🍦	box Box #	2	Dropbox Business Dropbox Business	x		
Succeeded		Succeeded		Succeeded		Succeeded			
Total Drives	28			Total Users	11	Total Users / Team folders	81		
Active Drives	28	Total Seats	4	Active Users	11	Active Users / Team folders	81		
Total Size	2.68 GB	Total Size	24.72 MB	Total Size	97,15 GB	Total Size	103.02 GB		
Last Snapshot	9 hours ago	Last Snapshot	14 days ago	Last Snapshot	12 hours ago	Last Snapshot	7 hours ago		
Next Backup	In 15 hours	Next Backup	In 4 hours	Next Backup	In 12 hours	Next Backup	In 17 hours		
Chauter Chauter		Constant (Do		Common (D		Change (han			

- 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.

New Tag		
Please enter a new tag name		
	Cancel	Create

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.

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 Comparis	son Select type and objects to compare		0 .
Data Compar two sna Object All obj	re particular object (e.g Account or Opportunity) or all objects across pshots to identify changes to records and fields jects		5
Metad Use this Apex Co	ata s tool to compare all your metadata objects(e.g. Reports, Workflows, ode, 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.

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

omparison Select typ	CreatedDate, LastModifiedDate, LastModifiedDate, LastViewedDate, SystemModstamp
Data	SystemModstamp.
Compare particular object two snapshots to identify c	(e.g Account or Opportunity) or all objects across hanges to records and fields ①
Jbject	

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

Data		
Compare particular object (e.g Account two spapshots to identify changes to r	it or Opportunity) or all objects across	
Object		
All objects	۹.	
All objects		
Account		
PermissionSetTabSetting		
WorkOrderStatus	bjects(e.g. Reports, Workflows,	
	huly changes	
Document	2	
ConviceAppointmontStatur		
SPIVICEADUGUITTEEUSIAUS		

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

	Salest	force	Back	kup				Backup
	Backup	o Task	1					Backup Task
								Enterprise edition
	Snapsł	not da	ite					Snapshot date
1	« «	ć	D	ec 20)20		× ×	
	Su	Mo	Tu	We	Th	Fr	Sa	
	29 6 13 20 27	30 7 14 21	1 8 15 22	2 9 16 23 30	3 10 17 24	4 11 18 25	5 12 19 26	Salesforce
	3	4	5	6	7	8	9	
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 Backup		Ba	ckup					
Backup Task	Ba	ackup	Task					
Renat		Enter	prise	editio	n			~
Snapshot date	Sr	napsh	ot dai	te				
								×
		« ‹		De	ec 20	20		> >>
		Su	Мо	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

- 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.

Comparing Data - All objects		
Salesforce backup BACKUP 25/12/20 12:05:35 PM	In Process 0%	Enterprise edition BACKUP 09/11/20 10:07:11 AM
		Cancel View Result

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:

Backup	task Salesforce backup	Q Search Object	Backup task Enterprise edition		
231	12/20 12:03:33 FM		09/11/2010/07/11	AM	
Total Records	Unique Records	Changed Records	Unique Records	Total Records	
		Task			
3	3	0	1		
		LightningUsageByAppTypeMetrics			
27	27	0	214	21	
		TaskPriority			
3	3	0	3		
		SetupEntityAccess			
920	920	0	3526	352	
		PermissionSetTabSetting			
3742	3742	0	1080	108	

		LightningToggleMetrics		
27	27	0	34	34
		Lightning Isage RyPage Metrics		
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
		A manufacture and		
		Community		
1	1	0	1	1
		BusinessDrocess		
1	1	0	5	5
8.I.		6	2	5
The following 3 data	object(s) had no changes	5		
The following 40 data	a object(s) exist only in Ba	ackup task Renat - 25/12/20 12:05:35 PM	N	
The following 49 data	a object(s) exist only in Ba	ackup 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:

	Α	В	С	D	E	F	G	н	1	J	К
1	ld	DurableId	Label	MasterLabel	NamespacePref	DeveloperName	LogoUrl	Description	UiType	NavType	UtilityBar
2	000000000000000	06m5J00000n7	Sales	salesforce	standard	Sales	/img/salesforce-	The world's most popular sales	Aloha	Standard	
3	000000000000000	06m2X000001D	Sales	salesforce.com	standard	Sales	/img/salesforce-	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.

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Backup tas 25/12/	k Salesforce backup 20 12:05:35 PM	Q log	Backup task Enterp 09/11/20 10:07	orise edition 7:11 AM
Total Records	Unique Records	Changed Records	Unique Records	Total Records
		IdpEventLog		
4	4	0	16	1
		UserLogin		
6	6	0	3	
		LoginIp		
67	67	0	14	1
		EventLogFile		
662	662	0	55	5
		LoginGeo		
6921	6921	0	1107	110
following 3 data	a object(s) had no changes			

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:

count ApexT	estResult ContentDistribution Product2
OpportunityLineIte	m ApexTestResultLimits WorkOrderStatus
DuplicateRecordite	m Book_c Attachment
ServiceAppointmer	tHistory OpportunityHistory Case
SolutionHistory	ServiceAppointmentStatus EmailMessageRelation
ContentFolderLink	Opportunity Lead ServiceReportLayout
DuplicateRecord5e	t Pricebook2History ContentWorkspacePermission
CampaignMember	Solution WorkOrderLineitemStatus CaseHistory
EmailMessage	FieldServiceMobileSettings OpportunityContactRole
AssignmentRule	CampaignMemberStatus ServiceAppointment
MetaDataSearch (Config Manager c PricebookEntry Seeding c

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:

Salesforce bad	ckup Comparison Select type and objects to compare		0
	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		
	ApexComponent Can ApexEmailNotifications	cel N	ext
	ApexPage		
	ApexTrigger		
	AppMenu		
	AssignmentRules		

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

Sales	force	e Sar	ndbo	×			Backup
Backu	p Tasl	k					Backup Task
							Enterprise edition
Snapsl	not da	te					Snapshot date
						х	
«	<	D	ec 20	020		> >>	
Su	Мо	Tu	We	Th	Fr	Sa	
29 6	30 7	1 8	2 9	3 10 17	4 • 11	5 12	Salesforce
20	21	22	23	24	25	26	Other Organisation
3	4	5	6	7	8	9	

- 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:

Salesforce Sandbox	Backup
Backup Task	
Ren	Salesforce
Constant data	
Snapshot date	Other Organisation
	organisation website. Don't worry we don't store your credentials
	Production
	Production
	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.

Comparing Metadata Object -	ApexClass	La
Salesforce backup BACKUP 30/11/20 01:46:27 PM	In Process 0%	Salesforce backup / Alyssa Roc BACKUP 10/11/20 12:09:48 PM
		Cancel 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.

alesforce backup BACKUP	100% Completed	Salesforce backup BACKUP
----------------------------	----------------	-----------------------------

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

Backup task Salesforce backup 27/09/20 04:14:43 AM		Q Search Object	Backup task Salesf 24/12/20 12:06	Backup task Salesforce backup 24/12/20 12:06:01 PM	
Total Records	Unique Records	Changed Records	Unique Records	Total Records	
		sharingRules			
75	0	0	4	7	
		objects			
151	0	2	7	15	
		profiles			
34	0	34	0	3	
		layouts			
118	0	0	4	12	

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:

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Backup tas	k Salesforce backup	Q object	Backup task Salesfo	orce backup
27/09/	20 04:14:43 AM		24/12/20 12:06	i:01 PM
Total	Unique	Changed	Unique	Total
Records	Records	Records	Records	Records
151	0	objects	7	15

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	
Packups >> Salesforse backup >> Compare >> Drofiles	
backups >> balestorce backup >> compare >> Promes	
profiles 34 Changed Records	🔟 👱 Download ALL
Admin.profile	$\underline{\downarrow}$ \wedge
00 -4744.6 +4744.11 00	
4744	4744
4745 <fieldpermissions></fieldpermissions>	4745 <fieldpermissions></fieldpermissions>
4746 <editable>false</editable>	4746 <editable>false</editable>
	4747 + <field>Case.AssetWarrantyId</field>
	4748 + <readable>false</readable>
	4749 +
	4750 + <fieldpermissions></fieldpermissions>
	4751 + <editable>false</editable>
4/4/ <field>Case.BusinessHoursId</field>	4/52 <field>Case.BusinessHoursId</field>
4/48 <readable>talse</readable>	4/53 <readable>talse</readable>
4/49 4/49 00 5003	4/54
5003 (readable)true/(readable)	5000 (readable>true/ readable>
5004 (/fieldDermissions)	5000 (/fieldPermissions)
5095 <fieldpermissions></fieldpermissions>	5100 <fieldpermissions></fieldpermissions>
	5101 + <editable>false</editable>
	5102 + <field>ContactPointAddress.PreferenceRank</field>
	5103 + <readable>false</readable>
	5104 +
	5105 + <fieldpermissions></fieldpermissions>
	5106 + <editable>false</editable>
	5107 + <field>ContactPointAddress.UsageType</field>
	5108 + <readable>false</readable>
	5109 +
	5110 + <fieldpermissions></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*.

SF / Homepage > SF	
	Seators 💮 Sectores Size 28.64 MB Last Backup 16 hours app Backup actions 🎧 🖓 👚
++ Compare 🔯 Replicate 🔅 Smort Alerts 🚫 How it works?	Edit

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

SF Replicate Select ty	pe and snapshot date to Replicate	0 • • • •
	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

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 <u>Full</u> 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 <u>Multiple</u> <u>Parent Objects</u> 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:

oose object from the list below to determine whic	th fields you want to a	inonymize.				Default System Ten
Search Object		Q Search Fields				
ll Objects		Only Anonymized 🗸	Replace with		Preview 📵	
aProcess		BillingCity	City	~	New York	
ormulaFunction			Description de		2000	
count.		BillingPostalCode	Postol Code	~	10013	
ghtningUsageByAppTypeMetrics		BillingState	State	~	New York	
iskPriority		BillingStreet	Street	~	N. Moore	
tupEntityAccess						
rmissionSetTabSetting		Fax	Phone	~	212-379-8543	
	*					

- 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.

hoose object from the list below to determine which fi	elds you want to a	nonymize.				Default System Template
© Search Object		Q Search Fields				
All Objects		Only Anonymized 🗸	Replace with		Preview 🕕	
SlaProcess	î.	BillingCity		~	New York	
FormulaFunction		no number			10013	
Account		billingPostalCode	Random	- 10	10013	
UghtningUsageByAppTypeMetrics		BillingState	Phone	- 11	New York	
TaskPriority		BillingStreet	E-mail		N. Moore	
SetupEntityAccess			Account Name			
PermissionSetTabSetting		Fax	First name		212-379-8543	
	*		Last name			2

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.

her Organisation Sandhoy	
Il be asked to authorise on the organisation e. Don't worry we don't store your credentials	
bsit	bsite. Don't worry we don't store your credentials

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 o	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.

Salesforce Sandb	ox Replicate Select type and snapshot date to Replicate $\circ \circ \circ$
	Full Organisation A "Full Org"replicate job will migrate all data across all Objects from the source Org Snapshot to the desitnation Org.
	Multiple Parent Objects Select Parent Objects to include in the replication data set. Our system will automatically identfy 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	• • 0 • •
Q Search object	
Account	
Book_c	
BusinessHours	
Calendar	
Campaign	
CampaignMember	
Case	
ChatterActivity	
Contact	
Include Attachments () Hierarchy depth ()	
← 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.

Salesforce Backup and Restore User Guide Comparing, Replicating, and Setting Smart Alerts

Q Search object			Filtering for All objects
GroupMember	Use all records	X	Use all records
ProcessNode	Use all records	Х	Pick 200 Newest V records
Product2	Use all records	×	SOQL WHERE clause

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 E You can narrow down the data	Data Replicate Object Filt a being replicated, by filtering each ob	ering _{ject}	
Q Search object			Filtering for All objects
GroupMember	SOQL WHERE clause	×	O Use all records
ProcessNode	Use all records	х	○ Pick 200 Newest ∨ records
Product2	SOQL WHERE clause	x	SOQL WHERE clause
	Deselect		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:

a bara nepileate bara monginizato.						
hoose object from the list below to determine which f	fields you want to a	inonymize.				Default System Template
G Search Object		G Search Fields				
All Objects		Only Anonymized 🗸	Replace with		Preview 🔞	
SlaProcess	÷.	BillingCity	City	~	New York	
FormulaFunction		BillingPostalCode	Postal Code	~	10013	
Account						
LightningUsageByAppTypeMetrics		BillingState	State	~	New York	
TaskPriority		BillingStreet	Street	~	N. Moore	
SetupEntityAccess		Fax	Phone	~	212,370,8543	
PermissionSetTabSetting					212 212 2212	

- 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					••0 •
Choose object from the list below to determine which fields you want t	to anonymize.				Default System Template
© Search Object	© Search Fields				
All Objects	Only Anonymized 🗸	Replace with		Preview 🕕	
SlaProcess	BillingCity		~	New York	×
FormulaFunction	BillingPostalCode	Skin		10013	
Account	Sec. 9. Constants	Random			
LightningUsageByAppTypeMetrics	BillingState	Phone	- 8	New York	
TaskPriority	BillingStreet	E-mail Account Name		N. Moore	
SetupEntityAccess PermissionSetTabSetting	Fax	Salutation		212-379-8543	
		Last name	-		*
← 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.

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 	

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.

Replicating Data Object - 3 Ol	ojects	28/12/20 11:48:08 AM
Salesforce backup 25/12/20 05:11:48 AM	In Process 0%	alyssaroche@yahoo.com Sandbox

6.3.2 Replicating Metadata

To initiate the metadata comparison procedure, follow these steps:

57 J	
(Connected #)	Sents 7 Status) Soccess Size 28.64 MB Last Backup 16 hours ago Backup actions $\frac{1}{10}~\psi~\frac{1}{10}$
++ Compare Replicate Alerts How it works?	Edit

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

SF Replicate Select type and snapshot date to Replicate	0 • • •
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.	

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.

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	

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.

Replicating Data Object - 3 (Dbjects	28/12/20 11:48:08 AM
Salesforce backup 25/12/20 05:11:48 AM	In Process 0%	alyssaroche@yahoo.com Sandbox

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:

SF Metadata Re	plicate Select Metadata Object		••••
	Q Search object		
	ApexEmailNotifications	<u>_</u>	
	AppMenu AppointmentSchedulingPolicy		
	AssignmentRules		
	AutoResponseRules		
	CleanDataService		
	CustomApplication		
	CustomLabels		
	CustomObject		
← Back		Cancel	Next

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.

Replicating Data Object - 3	Objects	28/12/20 11:48:08 AM
Salesforce backup 25/12/20 05:11:48 AM	In Process 0%	alyssaroche@yahoo.com Sandbox

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-intime 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 <u>Creating a New Backup Task</u>.

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

SF ≠ Honepage > SF	
Connected #	Seets 7 Status 🥥 Success Size 28.64 MB Last Backup 16 hours ago Backup actions 🌐 🖗 🛱
++ Compare 🔘 Replicate 🖉 Smort Alerts 🔘 How it works?	Edit.

Г

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

Salesforce Backı	up Smart Alert Select Alert Level		0 • •
	All Objects Create an Alert for all Objects that compares changes between the previous and latest Backup		
	Specific Object Create an Alert for Specific Object that compares changes between the previous and latest Backup Choose a Specific Object Trigger Object		
	COMING SOON Record Level Alert Create an Alert when records are changed between the previous and latest Backup		
	Ca	incel	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**.

Г

٦

All Objects Create an Alert for all Objects that compa	res changes between the previous and latest Backup	
Specific Object Create an Alert for Specific Object that co Choose a Specific Object	mpares changes between the previous and latest Backup	
Trigger Object	۹.	
Account AppMenuItem Campaign CampaignMemberStatus	commission)	
Case Contact ContentDistribution ContentDocument	Ca	ncel Nex

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

rt when more than	Triggered by
Choose An Amount	Single User
0	Changes made by a single user
Choose Unit	
Select Unit V	All Users
Choose an Event	Changes made by all users
Select Event \lor	

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Comparing, Replicating, and Setting Smart Alerts

- 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 R	eview & Confirmation	n		•• • •
You have configured to notify y	ou when			
More than	1000	Records		
In All Objects are	Deleted			2
Triggered by	Single User			
← 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.

Monepage	SF / Homepage = SF								
冒 jobs	Connected @								Seats 7
© Recovery					Status 🥥 Success Sia	ze 31.83 MB Last B	ackup 13 hours ago Back	up actions 🛗	9.0
8 Activity	++ Compare 🖓 Replicate 🔅 Smart A	© How it works?							Edt
© Senings	Objects Compares Replicates Smart Alerts								
	4 Total Smart Alerts							(+) Add	New Alert
	(= Search by logger Glack.)					(6	vent v (Triggered B	v · ·	sine (Y
	Trigger Object 3	Rule	1	Total 3	Unit	5 Event	÷ Trig	gered by 💈	
	All Objects	More than		1000	Records	Deleted	Sig	gle User	Gu //
	Campaign	More than		250	Records	Deleted	All	Users	Gu Ø
	Document	More than		150	Records	Updated	Sig	gle User	Qi /
	Task	More than		25	- N.	Updated	Sig	gie User	Cu I

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.

	Settings Settings > Noblications > Bo	b Smith					
) etc.	User Info						
© Recovery	Email	bob smith	@ca4software.onmicrosoft.com		Display Name	Bob Smith	
8 Acouny	Notifications						
() Settings	Summary Report	Recovery Notification	Exceptions Notification	Auto Discovery Notification	Smart Alerts		
							SAVE Cancel

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.

 Homepage	Activity	
Jobs	System Activity	Security Audit
Recovery		Q
Billing	Search for activities performed by the system	Check users actions performed in the system
오 Activity		
දි වි Settings		

7.1.1 System Activity

Click System Activity.

Homepage	Activity	
Jobs	System Activity	Security Audit
Recovery		Q
Billing	Search for activities performed by the system	Check users actions performed in the system
ے Activity		
🔅 Settings		

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

	Start date . En	d date (Activity ~	(Service ~)	(Status ~)		O Search bu Tas	k nome v
■ obs	Activity	Date and Time	Service	Sub Service	Status	Task Name	Item
ର overy	Export	jul 12 2022 04:08 PM	80	Calendars	Succeeded	Full MS Exchange Backup / bob.smith@ca	bob.smith@ca4software.onmicrosoft.com
0	Backup	jul 11 2022 01:01 PM	-	(2)	Succeeded	Sharepoint backup	/sites/AltaroRestored_Shared_mailbox_20 21_08_31_11_05
tivity	Export	jul 11 2022 01:00 PM	B B	Channels	Succeeded	Full Teams Backup / AltaroRestored_Lind	AltaroRestored_Linda_Fuller_2021_08_31_0
ø	Restore	Jul 11 2022 01:00 PM	•		Succeeded	One Drive / cloudally1-my.sharepoint.co	/2sepo_kazandev_pro
tings	Backup	Jul 11 2022 05:04 AM	98	Calendars	8 Falled	Full MS Exchange Backup	Mila.Scott@ca4software.onmicrosoft.com
	Backup	Jul 6 2022 05:06 AM	30	Notes	Succeeded	Full MS Exchange Backup	jacob.Anderson@ca4software.onmicrosoft. com
	Backup	Jul 6 2022 05:06 AM	30	Notes	Succeeded	Full MS Exchange Backup	Agata.Brown@ca4software.onmicrosoft.co m
	Backup	Jul 6 2022 05:06 AM	88	Notes	Succeeded	Full MS Exchange Backup	Alex.Duglas@ca4software.onmicrosoft.com
	Backup	jul 6 2022 05:06 AM	05	Notes	Succeeded	Full MS Exchange Backup	Sarah.johnson@ca4software.onmicrosoft.c

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.

🕗 Backup	
Execution Time:	Nov 5 2024 11:55 AM
Data Size:	452.70 KB
Number of Records:	51
Description:	Contacts Completed (test-101@cloudiox.com, 51 items, 63.45 KB delta data size, 0 minutes).

 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.

O Homepage	Activity Activity > System activit	y					
<u>مور</u>	Stort date - En	d date 🗄 🗛 Activity (1) 🗸	Service 🗸	Status (1) ~		Q Search by Task	nome v) (Q. Search Ihems. V) 🕑
© Recovery	Restore O	S Failed O Delete Backup		Succeede	d		Clear Filters
& Activity	Activity	Date and Restore	Service	Partially S	ucceeded	Task Name	item
() Settings	Restore	jul 12 2023 0 Export Compare	•	Cancelled	rd	Salesforce Sandbox	bob.smith@ca4software.onmicrosoft.com
	Restore	Jul 12 2023 03:05 PM	•		S Failed	Salesforce Sandbox	bob.smith@ca4software.onmicrosoft.com
	Restore	May 8 2023 02:54 PM	•	ž.	S Failed	Salesforce Sandbox	bob.unithijca4software.consicrosoft.com
	Restore	Apr 10 2023 01:57 PM	1	Channels	S Failed	Groups/Teams backup / CA4 Software	CA4 Software
	Restore	jan 2 2023 03:16 PM	4	ар -	Faled	Google Shared Drives / IADD123	SADD123
							-
() ()	td ago. 🔘						U

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.

O nomepage	Activity Activity - Security audit							
jobs'	310% use - or - or vest (e -) two (e -) (get)							
© Recovery	Date	User Activity	Service	Status	Task	Performed By	Description	
8	Seo 11 2023 03:09 PM	Sign-in		Completed	bob smith@ca4software.onmicrosoft.com	bob smith@ca4software.onmic	Native Sign in (OK) Chrome from io 46 117:234.42.	
©	Seo 11 2023 01:57 PM	Sign-in		Completed	bob smith@cs4software.onmicrosoft.com	bob.smith@ca4software.onmic	Native Sign in (OK) Chrome from ip 46.117.234.42.	
Senings	Sep 11 2023 01:39 PM	Sign-in		Completed	bob smith@cs4software.onmicrosoft.com	bob.smith@ca4software.onmic	Native Sign in (OK) Chrome from ip 46 117 234.42	
	5ep 11 2023 12:05 PM	Notification	🛆 Google Shared Drives	Completed	Google Shared Drives / 1901january2.0	bob smith@ca4software.onmic	Download Task for drive 1901/anuary2.0 has been st	
	Sep 11 2023 12:05 PM	Notification	G Google (Email)	Completed	Google Workspace / apostrophe@cloud	bob.smith@ca4software.onmic	Mail: Download Task for mailbox 'apostrophe@cloudr	
	Sep 11 2023 12:04 PM	Sign-in		Completed	bob smith@ca4software.onmicrosoft.com	bob.smith@ca4software.ormic	Native Sign in (OK) Chrome from io 46:117:234-42:	
	5ep 11 2023 10:52 AM	Signin		Completed	bob smith@cs4software.onmicrosoft.com	bobamith@ca4software.onmic	Native Sign in (OK) Chrome from ip 46.117.234.42.	
	Seo 10 2023 02:00 AM	Backup Deleted	Scogle 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	Coogle Shared Drives	Completed	Google Shared Drives		The backup for the drive BE-AutoTests has been mark	
	Sep 8 2023 12:00 AM	Backup Deleted	G Google Workspace	Completed	Google Workspace		The backup for the malibox gakashtest@cloudrain.co	
© Support	5ep 8 2023 12:00 AM	Notification	G Google Workspace	Completed	Googie Workspace		Backup for the mailbox gakashtest@cloudre 💿 Help	

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.

O Homepage	Settings				
III adol	Account	User Management	Security	Notifications	Integrations
© Recovery	0 @	00 (C)	\bigcirc	\bigtriangleup	Ç.
C3 Billing	Manage account settings	Manage other users	Manage security settings	Manage system notifications	Manage integrations with tools and services
8 Activity					
Settings					

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.

O Homepage	Settings Settings > Account	
)obs	Account Name:	Bob Smith
© Recovery	Email:	bob.smith@ca4software.onmicrosoft.com
8 Activity	Data Center Location :	Europe () whired
() Settings	Partner ID:	
		Sove Concel
	To terminate your This includes removing	Backup Service subscription, click on the REMOVE ACCOUNT button. g all of your data.
	I approve the remova	l of my data from the Backup Service.
		Remove Account

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**

Homepage	Settings Settings > Account				
Recovery	Account Name:	Bob Smith			
Billing	Email:	Bob.smith@ca4software.onmicrosoft.com	New Email - Waiting for Approval	username@company.com	Discard
Security		Note: Confirmation was sent to your new e	email username@company.com and	is waiting for your approval.	Resend Email Confirmation
© Settings	Data Center Location:				
					Save Cancel

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.

tings > User Management				
BETA) End User Recovery				
nd User Recovery allows all users in your Mi	crosoft domain who hav	ve Exchange backups, to log in with their Mic	crosoft credentials, access their own b	ackups, and recover their data.
e following external credentials are	e currently linked to	o your Backup Service account.		
can remove the credentials anytime if you prefer to	use only your Backup Serv	vice sign-in credentials.		
				(+) Add new (
Email	Туре	2FA Authentication		
Email Bob.smith@ca4software.onmicrosoft.com	Type Email	2FA Authentication		
Email Bob.smith@ca4software.onmicrosoft.com Alex.douglas@ca4software.onmicrosoft.com	Type Email Email	2FA Authentication	00	
Email Bob.smith@ca4software.onmicrosoft.com Alex.douglas@ca4software.onmicrosoft.com	Type Email Email	2FA Authentication	0 0 4 0	
Email Bob.smith@ca4software.onmicrosoft.com Alex.douglas@ca4software.onmicrosoft.com Rosy.white@ca4software.onmicrosoft.com	Type Email Email Email	2FA Authentication	1 0 1 0	
Email Bob.smith@ca4software.onmicrosoft.com Alex.douglas@ca4software.onmicrosoft.com Rosy.white@ca4software.onmicrosoft.com	Type Email Email Email	2FA Authentication 0 0 0 Page 1 of 1	0 0 0 0	Showing 1-3 of 3

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:

O Homepage	Settings Settings > User Management >	- New user			
III Jobs	Email:	Alex.Douglas@onmicrosoft.com	Type:	Email	¥.]
© Recovery	Password		Role	Custom	v.
8 Activity	~ Operations		- Services		
Settings	General View Account setti View billing page ai View billing notifica View setting View security audit Manage Notificatio View backups page Geckup Taiac	ng page nd manage payment details tion messages ty page ns	All Microsoft E Microsoft G Microsoft O Google Acco Salesforce Dropbox Bu Box Google Wor	kchange roups / Teams ararePoint neDrive sunt ssiness kspace	
0		p (1504) (0) 5 (0) 5 (0) 5 (15) 6 (15) 6 (15) 7	Google Shar	ed Drives	G

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

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

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

 Homepage	Settings Settings > User Management				
Jobs	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.				
G Recovery					
A confirma jessica.mili	tion message has been sent to ler@ca4software.onmirosoft.com	Туре	2FA Authentication		
Follow the new addre	link in the message to confirm the ss.	Email	•		
8	jessica.miller@ca4software.onmirosoft.com	Email	0	00	Resend Email Confirmation
Activity	Sarah.Johnson@ca4software.onmicrosoft.com	Email	۲		
Settings					Page 1 of 1

7.4 Security Settings

The Security Settings page enables you to:

a sonar Password Policies	
ange your account password	Change password
u 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.



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

7.4.1 Changing Your Password for Credential-Based Authorization

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

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

Change password	Х
Current Password: New Password:	
Confirm New Password:	SAVE Cancel
	SAVE

- 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 6digit 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.

okta		Q Search
Dashboard Directory	÷	Applications
Customizations	~	Developer Edition provides a limited number of apps.
Applications	^	Deactivate unused apps or check out our plans page. Contact us to find a plan that is right for your organization.
Applications		Create App Integration Browse App Catalog Assign Users to App More *
Self Service		

In the search bar, enter our backup service.

Applications	Help
Developer Edition provides a limited number of apps. Deactivate unused apps or check out our plans page. Contact us to find a plan that is right for your org	anization.
Create App Integration Browse App Catalog Assign Users to App More *	
Q Backup Service	
STATUS CLOUDALLY CloudAlly	o •

- 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.

App E	Embed Link Edit
Embed	Link
You can Okta.	use the URL below to sign into the Backup Service from a portal or other location outside of
https	://Bob.smith@okta.com/home/123456789_Backup_service/Ooa2refp3!s2091Re09c
Applic	ation Access Error Page
Applic:	ation Access Error Page one who is not assigned to the application attempts to use an embed link, they will be redirected
Applic: If someona defaul	ation Access Error Page one who is not assigned to the application attempts to use an embed link, they will be redirected t error page or one that can be customized. An application level setting will override default URL
Applic: If someo a defaul settings	ation Access Error Page one who is not assigned to the application attempts to use an embed link, they will be redirected t error page or one that can be customized. An application level setting will override default URL
Applic: If some a defaul settings	ation Access Error Page one who is not assigned to the application attempts to use an embed link, they will be redirected t error page or one that can be customized. An application level setting will override default URL Use the error page setting on the global settings page

7.4.3.2 Setting Up Okta in our Backup Service Application

omepage	Homepage				
	(Search				8 =
jobs	9 Backups				+ Add Backup Task
© lecovery	Microsoft Exchange Backup 🤌 🥜	Groups/Teams & ?	SharePoint / d	OneDrive Microsoft OneDrive	G Google Workspace a P
Activity	Succeeded	Succeeded	Succeeded	Succeeded	Succeeded
G	Total Mailboxes 12 Active Mailboxes 12	Total Groups / Teams 19 Active Groups / Teams 3	Total Sites 22 Active Sites 2	Total Sites 8 Active Sites 8	Total Users 39 Active Users 39
	Total Size 53.19 MB	Total Size 499.64 KB	Total Size 73.00 MB	Total Size 17.83 MB	Total Size 133.04 GB
	Last Snapshot 6 hours ago Next Backup In 18 hours	Last Snapshot 4 hours ago Next Backup In 20 hours	Last Snapshot 3 hours ago Next Backup In 20 hours	Last Snapshot 2 hours ago Next Backup In 20 hours	Last Snapshot 11 hours ago Next Backup In 13 hours
	Secoury Backup Now	S Recovery Backup Now I	Recovery Packup Now I	S Recovery Sadkup Now I	Recovery A Backup Now I
	Google Shared Drives &	Salesforce Sandbox 🥔 🥐	box Box	Dropbox Business	
	Succeeded	Succeeded	Succeeded	Succeeded	
	Total Drives 28		Total Users 11	Total Users / Team folders 81	
	Active Drives 28	Total Seats 4	Active Users 11	Active Users / Team folders 81	
	Total Size 2.68 GB	Total Size 24.72 MB	Total Size 97.15 GB	Total Size 103.02 GB	
	Last Snapshot 9 hours ago	Last Snapshot 14 days ago	Last Snapshot 12 hours ago	Last Snapshot 7 hours ago	
	Next Backup In 15 hours	Next Backup In 4 hours	Next Backup In 12 hours	Next Backup In 17 hours	
	S Recovery (Backup Now)	S Recovery Backup Now i	Secovery Backup Now I	Recovery Backup Now 1	

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

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

O Homepage	Settings			1	
⊒ Jobs	Account	User Management	Security	Notifications	Integrations
چ Recovery	0 	8	\bigcirc	4	<i>(</i> ;;;
C) Billing	Manage account settings	Manage other users	Manage security settings	Manage system notifications	Manage integrations with tools and services
8 Activity					
(Settings					

3. Click the **SAML** tab.

 Homepage	Settings Settings > Security		
Jobs	Password	IP Restrictions	SAML

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

Anniepage Bill Jobs	Settings Settings > Security Password IP Restrictions	Email & Password: Active
Recovery Activity Settings	SAML provider Cons Identity Provider Metadata File Prose upload SML metadata XML file generated by Oksa Consultation Office State St	
	URL to the SAML Identity Provider Metadata Ble. Upload File C. Choose File No file choose.	Activote

- 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.**

Email & Password: Active	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**.

٤		bob.smith@ca4software.onmicrosoft.com Bob Smith Log Out 🗄
O Homepage	Settings Settings > Security	Email & Password: Active
Jobs	Password IP Restrictions SAML	
(C) Recovery	IP Address Restrictions Settings	Your IP Address: 79.182.47.197
8 Activity	IP Address restrictions allow you to control who can access your account based on their IP address. Once you configure a set of trusted IP address 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.	
Settings	CAUTION: Make sure to add your own IP address and to use static IP addresses. Setting up wrong IP addresses may result in being locked out of your account.	
	Trusted IP Addresses	+ Add IP Address
	IP Description IP Address	Actions
(C) Support		() Help

- 2. Click + Add IP Address.
- 3. Enter one or more IP addresses:
 - a. Enter individual addresses separated by commas, and an optional description.

AU	d New IP Addre	ess	Your IP Address: 130.248.112.
Ente	er IP Address descript	ion	(optional)
e.g	. Office		
You	can add one or mor	e IP addresses, or a ra	nge of IP addresses:
۲	Trusted IP Address(25)	
	Separate multiple IP ad	dresses with ",".	
	Example 192.168.10.5		
	Trusted IP Address I	Range	
	From	То	
	Example 192.168.10.0 -	192.168.10.255	
			Cancel Save

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 a	addresses:
Trusted IP Address(es)	
Separate multiple IP addresses with ",".	
	1
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

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.

nepáge	Security Settings Settings > Security		Email & Password: Active
Covery	Password SAM	IP Restrictions	
C3 Ming	IP Address Restrictio	is Settings	Your IP Address: 130.248.112.29
8 icurity	IP Address Restrictions allow Once you have configure a se You can define a single IP adi	ou to control who can access your account based on their IP address. of trusted IP addresses and enable IP Address restrictions, any user attempting ress or a range of IP addresses. Only IPv4 is accepted.	to log in via an IP address that is not trusted will be blocked.
(i) ettings	CAUTION: Make sure to add yo	r own IP address and to use static IP addresses. Setting up wrong IP addresses may	result in being locked out of your account.
	Trusted IP Addresses		+ Add IP Address
	IP Description	IP Address	Actions
	Office	192.168.10.5, 192.168.10.120, 192.168.40.157, 192.168.60.180	0 12
6			
•			

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:

CLOUDALLY an opentext company		• Hone Free Trial & Legter
	Sign In to your Account Don't have an account? Sign up	
	bob.smith@ca4software.onmicrosoft.com	
		ø
	farget and proof. Access denied.	
	G Sign in with Google	
	Sign in with Microsoft	
	O Sign in with Okta	
	Turing of Easting and Roberts Distances	
	powered by aws	

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**.

O Homepage	Settings				
≡ sdot	Account	User Management	Security	Notifications	Integrations
G Recovery	0 @	80 (17)	\bigcirc	4	¢;
C) Billing	Manage account settings	Manage other users	Manage security settings	Manage system notifications	Manage integrations with tools and services
& Activity					
© Settings					

The following screen will appear:

100 March 100 Ma							
Summary Report							
Report Format:							
Backup tasks overview	Preview		1	Report Frequency:			
O Backup failure details	Preview			Once A Day 🛛 🗸			
Provide as:							
O CSV Attachment				Send the report only in ca	se of backup failure		
Download Link							
Download Link							SAV
Download Link nd Notifications To:						(+) /	SAV
 Download Link nd Notifications To: Email 	Display Name	Summary Report	Recovery Notification	Exceptions ①	Auto Discovery Notification	(+) A Smart Alerts (1)	SAV Add new rec Action

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.

Settings > Notifications > N	ew Email report				
User Info					
Email			Display Name		
Notifications					
🗍 Summary Report	Recovery Notification	Exceptions Notification	Auto Discovery Notification	Smart Alerts	
					SAVE Crocel

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.

splunk-enterprise	Ages =	0	dror ben yair •	Messages •	Settings +	Addedy *	Hup+	Fird	
Data inputs Set up data inputs from I	tes and directories, network ports, and scripted inputs. If you want to set up forwardin Local inputs	ng and receiving bet	ween two Spiturik V	ntances, go lo F are	ording and rec	olving.			
	Types			Inputs	Ac	Store			
	Files & Directories Index a local file or manifor an entire obsertory			,u	+ Acc	new			
	HTTP Event Colector Receive data case HTTP or HTTPS			85	+ 8450	now /			

- 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.

Edit Global Settings	5				×
All Tokens		Enabled		Disabled	
Default Source Type			_json 💌		
Default Index			Default 🔻		
Default Output Group			None *		
Use Deployment Server					
Enable SSL					
HTTP Port Number ?	8088				
				Cancel	Save

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

gure a new token for rec	Cerving data over HTTP, Learn More 12	
Name	Splunk Token	
Source name override ?	optional	
Description ?	optional	
Output Group (optional)	None 🔻	

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: <u>Set up and use HTTP Event</u> 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.

Splunk SIEM Integration	③ Splunk HEC Setup
Splunk HTTP Event Collector URL(HEC)*	
Please verify Splunk SSL Certificate. 🔞	
https://splunk.company.com:8088/serv	ices/collector/event
Splunk Token*	
123456789-abcd-efgh-1u2j3k4l5m6n	
Event Source (Optional)	
Enter your event source	
Send Activity Events	
Send Audit Log	
	Cancel Save

- 3. By default, there are 2 options at the bottom that are selected. You can deselect 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 <u>Autotask</u>, 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 <u>Payment Details</u> 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.

Cloud to Cloud Backup		A Payment Failed; Unable to charge your credit card.	Dipoleted on Nov 07, 2022	bob.smith@ca4software.onmicrosoft.com Bob Smith Log Out
Annepage	Billing Billing > Status			

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.

Cloud to Cloud Backup		Reminder: Please pay your annual subscription	Classifierat and Natur Ods 2022	bob.smith@ca4software.ormicrosoft.com Bob Smith Log Out 📑
O Homepage	Billing Billing > Status			

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

Homepage	Billing Annual subscription, Renewal Date: Aug 18th 2022							
Jobs	Status	History	Payment Details					
Recovery	(S)	<u>(;;</u>						
Billing		C						
<u>م</u> Activity	Billing status of clients		Change your payment details					
දිටු Settings								

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:

Billing - Credit Card Details Card Number: CREDIT: X000(-3000X-3000X-1111 (12/2023) ADD NEW CARD ACTIVATE CARD Delete Card - Billing Details Currency: Title: Mr * First Name: Bob * Last Name: Smith 12345 * Billing Email: bob.smith@ca4software.onmicrosoft.com Company Tax Id: 12345 123 Main Street * Company Name: * Address Line 1: Address Line 2: Address Line 3: * Country: United Kingdom - State: Anytown "Zip Code/Postal Code: 12345 * City: Link O Attachment * Phone number: 2011234567 Email Invoice/Receipt: Payment Day:

8.2.1.1 Add New Card

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

Billing						
Billing >> Payment details						
Monthly subscription, next	t payment: Dec 13th 2020					
~ Credit Card De	tails					
Card Number:	undefined: XXXX-XXXX-XXX	XX-444 🗸				
				ADD NEW CARD	ACTIVATE CARD	(Delete card)
~ Add new card o	details					
Card Holder's Name:	Card Holder's Name:					
Card Number	Cord Number	MM / 305	010/			
Card Number:	Card Number	IVIIVI / T T	CVV			
					A	DD NEW CARD

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, nex	kt payment: Dec 7th 2020	
~ Credit Card De	tails	
Card Number:	CREDIT: XXXX-XXXX-XXXX-5048 (1 🗸	
	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.

* Currency: USD Title: * First Name: * Last Name: * First Name: * Last Name: * Billing Email: Company Tax Id: * Company Name: * Address Line 1: Address Line 2: Address Line 3: * Country: State: * City: State: * Phone number: Email Email	~ Billing Details			
* First Name: * Last Name: * Billing Email: Company Tax Id: * Company Name: * Address Line 1: Address Line 2: Address Line 3: * Country: State: * City: State: * City: Email * Phone number: Email * Phone number: Email	* Currency:	USD	Title:	~
* Billing Email: Company Tax Id: * Company Name: * Address Line 1: Address Line 2: Address Line 3: * Country: State: * City: State: * City: Email * Phone number: Email	* First Name:		* Last Name:	
* Company Name: * Address Line 1: Address Line 2: Address Line 3: * Country: State: * City: State: * City: * Zip Code/Postal Code: * Phone number: Email Invoice/Receipt:	* Billing Email:		Company Tax Id:	
Address Line 2: Address Line 3: * Country: State: * City: * Zip Code/Postal Code: * Phone number: Email Invoice/Receipt:	* Company Name:		* Address Line 1:	
* Country: State: * City: * Zip Code/Postal Code: * Phone number: Email Invoice/Receipt: City: Link • Attachment	Address Line 2:		Address Line 3:	
* City: * Zip Code/Postal Code: * Phone number: Email Invoice/Receipt: Link Attachment 	* Country:	~	State:	
* Phone number: Email Invoice/Receipt: Cink Attachment	* City:		* Zip Code/Postal Code:	
	* Phone number:		Email Invoice/Receipt:	🔿 Link 💿 Attachment
UPDATE BILLING DETAILS				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**.

Homepage	Billing Billing > AnnualSubscription	
	Annual subscription, Renewal Date: Oct 19th 2023	
Jobs	~ Billing Details	
Recovery	Subscription Starting Date:	November 3, 2022
G	Currency:	
Billing	* Country:	United States
8 Activity	* State:	New York 🗸
0	* City:	New York
Settings	* Zip Code/Postal Code:	01234
	* Company Name:	Pizza Perfecto
	Company Tax Id:	987654321
	* Company Address:	14652 Broadway
	Purchase Order Number (Optional):	4350123
	 Billing contact 	
	* First Name:	Bob
_	* Last Name:	Smith
© Support	* Billing Email:	Bob.smith@ca4software.onmicrosoft.com

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.

() Homepage	Billing Billing > Status						
∰)obs	Note: The billing status	is usually updated within	a few minutes after the pa	yment is complete. If the status has not updated af	ter 24 hours, please contact support.		
Recovery	Subscription Annual	Payments status Paid	Next renewal date Sep 12, 2023	Forecast for next payment \$226.80			
8	Payment Forecast						
Activity	Service Total Quantity		Billable Quantity	Unit Price	Total Amount		
Settings	MS Exchange (365)	6 mailbo	1085	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.

Cloud to Cl	oud Backup	e Overdue: Please pay your annual subsc	cription.	Updated on: Ma	v 03. 2023		?	Bob Smith 🗸
C Homepage	Billing Billing > Status							
冒 Jobs	Note: The billing state	is usually updated within a few minu	ites after the payment is comp	lete. If the status has not upd	ated after 24 hours, please contact	support.		
© Recovery	Subscription Annual	Payments status Amount Due \$253.00						
Billing	Overdue Invoices							
Activity	Issue Date	Status	Due Date	Effective Date	Total Amount	Download Invoice	Email Invoice	
Settings	Mar 18, 2023	Overdue	Apr 17, 2023	Apr 18, 2023	\$253.00	41197 ±	8	Poy Invoice

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:

Cloud	I-to-Cloud Backup	A Payr	ment Failed: Unable to charge	your credit card.	Updated or: Nov 07, 2022	bob.smith@ca4software.onmicrosoft.com Bob Smith Log Out 📑
Homepage Ellipsis	Billing Billing > Status					
© Recovery	Note: The billing stat	us is updated once a day. If y	ou made any recent payment	s it will be reflected in the next 24 hours.		
C Store	Subscription Monthly	Payments status Amount Due \$51.52				Update credit card details
Activity ©	Unpaid Bills					
Settings	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	t: Dec 13th 2020					
Reference Number	Issue Date	Due Date	Amount			
68277 🖒	November 13, 2020	November 13, 2020	\$143.45			
67599 🖒	October 13, 2020	October 13, 2020	\$44.65			
67134 🕢	September 13, 2020	September 13, 2020	\$49.40			
66837 🖧	August 13, 2020	August 15, 2020	\$44.65			
	Pege 1 of 1					

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

An example of a receipt is displayed below.

To: pizza	-perfecto.com – PPV001	Backup Service, Inc.		
Pizza Perfe 18 Mozarel United King	acto Ltd la Lane odom ID 307 123 08	Tax ID: 5145966667 123 Commerce Lane Anytown, USA 12345		
		www.backupservice.com		
Invoi Certified C	ice / Receipt 51646	26 April 2023		
Invoice	/ Receipt for admin@pizza-perfecto.com, 1 ye	ear backup starting April 2	2, 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	
		VAT 0% Total payable	0.00 GBP	
Payment Type	ts Details Description	VAT 0% Total payable Date	0.00 GBP 1,137.50 GBP Amount	
Payment Type PayPal	ts Details Description Account 12345678 / Transaction # 987654321	VAT 0% Total payable Date 26 April 2021	0.00 GBP 1,137.50 GBP Amount 1,137.50 GBP	
Payment Type PayPal	ts Details Description Account 12345678 / Transaction # 987654321	VAT 0% Total payable Date 26 April 2021 Tota	0.00 GBP 1,137.50 GBP Amount 1,137.50 GBP	
Payment Type PayPal PayPal	ts Details Description Account 12345678 / Transaction # 987654321 / Receipt for Proforma Invoice 11392 th PayPal nt Account: KQMTW2PHR5CUG	VAT 0% Total payable Date 26 April 2021 Tota	0.00 GBP 1,137.50 GBP Amount 1,137.50 GBP	
Payment Type PayPal PayPal	ts Details Description Account 12345678 / Transaction # 987654321 / Receipt for Proforma Invoice 11392 th PayPal nt Account: KQMTW2PHR5CUG	VAT 0% Total payable Date 26 April 2021 Tota Signature:	0.00 GBP 1,137.50 GBP 1,137.50 GBP 1,137.50 GBP	

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.

omepage	Settings Settings > User Management > New user					
■ Jobs	Email:	bob.smith@ca4software.onmicrosoft.com	Type:	Email	~]	
© tecovery	Password		Role	Custom	×.	
Billing	~ Operations		~ Services			
	General		All			
Activity	View Account setting page 🔞		Microsoft Exchange			
	View billing page and manage payment details 📵		Microsoft Groups / Teams			
0	View billing notification messages 🔞		Microsoft SharePoint			
ettings	View support page 📵		Microsoft OneDrive			
	View account activity 🚯		Google Account			
	Show all your support tickets		Salesforce			
	Manage Notifications		Dropbox Business			
	View backups page 📵		Box			
			Google Workspace			
	🔲 Activate new backup tasks 💿		Google Shared Drives			
	Modify backup tasks 💿		IMAP			
	📰 Delete backup tasks 💿					