NetApp SaaS Backup for Salesforce documentation

SaaS Backup For Salesforce

NetApp
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NetApp SaaS Backup for Salesforce documentation

NetApp SaaS Backup is a secure, cloud-native service that backs up your Salesforce data to Amazon S3 storage. SaaS Backup helps guard your data from threats or accidental deletion.

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Release notes

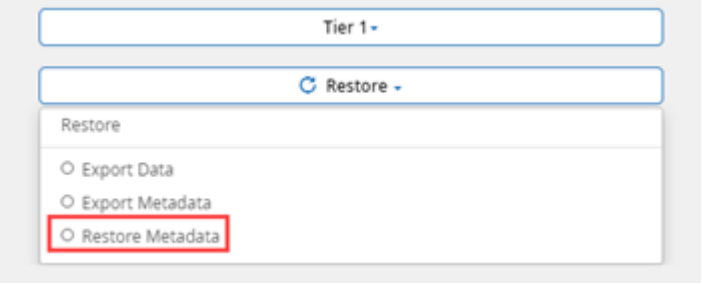
New features and updates

The following new features and updates have been added to this release of NetApp SaaS Backup for Salesforce.

December 2020

- SaaS Backup for Salesforce now restores metadata. This feature enhancement includes organization-level restores and granular-level single or multiple item restores for your metadata.

  Organization-level metadata restore

  Granular-level metadata restore

  [export and restore metadata options]

  Restoring data

- The **Backup summary** is a feature enhancement in SaaS Backup for Salesforce which gives you the total number of all your created, updated, and deleted records. It allows you to check that the number of your backup records matches that of your Salesforce account.

  Viewing backup records

October 2020

- SaaS Backup for Salesforce now backs up metadata. This feature enhancement includes backups, object and organization level restores, and purges for the metadata you create. The UI also has a new tab **Metadata Types and Components** where you can see your metadata backups. These pages provide more information for this new feature:

  Enabling and disabling metadata
  Restoring data

- Starting in October 2020, you can purge your data. Metadata is automatically purged after 90 days.

  Purging data and metadata

February 2020

You can now export data at the object and organization level. For each export, you can download attachments, results, and statistics from a previous backup.
Downloading export data

Known problems and limitations

The following is a list of SaaS Backup for Salesforce known problems and limitations.

Records missing in backup of some objects (Defect #1169)

After a full backup or incremental backup of an organization, there might be a small discrepancy in the count for the total number of discovered records versus the count for the total number of downloaded records. This occurs when specific fields are added to the query and consequently cause the Salesforce API not to return all records.

Restore of records backed up prior to schema change is not supported (Defect #1170)

SaaS Backup does not support restore of records that were backed up prior to a schema change. If this is attempted, the restore fails, and the following message is displayed: **Restore failed due to schema changes**.

Objects excluded from backups

SaaS backup for Salesforce does not back up the following objects:

- Objects which cannot be queried using Salesforce APIs
- Objects which do not support generic queries
- History objects used by Salesforce to track the history of field level changes to records in objects.

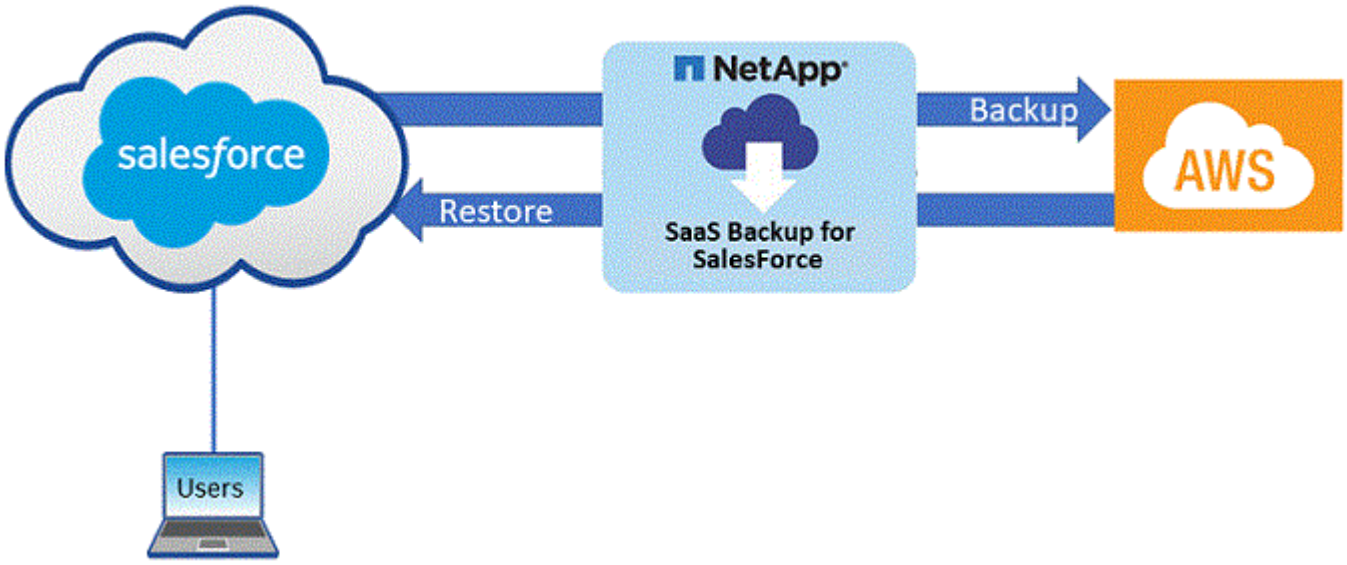
Features not supported in private preview

The following features are not supported in the private preview version of SaaS Backup for Salesforce.

- Salesforce chatter
- The following relationship types
    - N:1 to N:N relationships
    - Self-relationships
    - Cyclic relationships

NetApp SaaS Backup for Salesforce Overview

NetApp SaaS Backup for Salesforce is a secure, cloud-native service that backs up your Salesforce data to Amazon S3 storage. SaaS Backup helps guard your data from threats or accidental deletion.



NOTE: When you upgrade from private preview of SaaS Backup for Salesforce to general product availability, your private preview data is not preserved.

If you are interested in SaaS Backup for Microsoft Office 365, you can find the documentation here.

Getting started

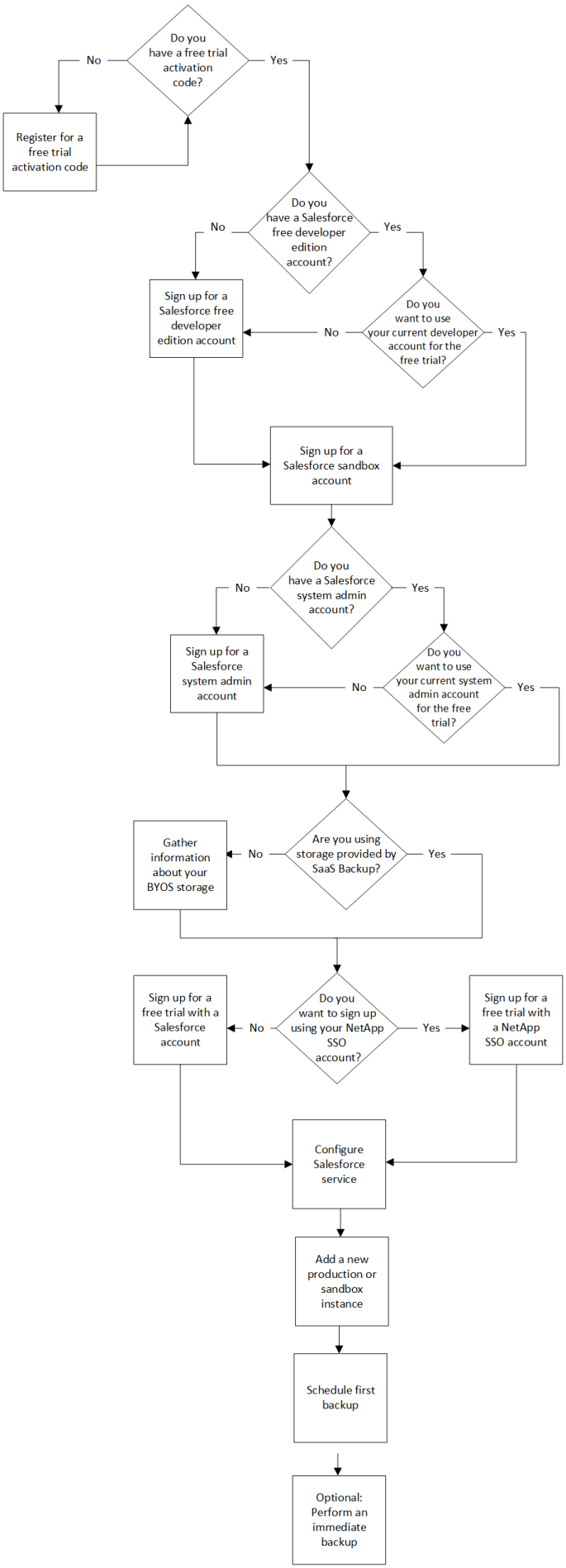
Getting started with a free trial

Workflow for getting started with a free trial of SaaS Backup for Salesforce

To get started with a free trial of SaaS Backup for Salesforce, you must do the following:

Steps

1. Be aware of the free trial restrictions.
2. Register for a free trial activation code.
3. If needed, sign up for a Salesforce developer edition account.
4. If needed, sign up for a Salesforce sandbox account.
5. If you don't already have a Salesforce system admin account, create one.
6. Decide if you will use Amazon S3 storage provided by SaaS Backup or if you will use a Bring Your Own Storage (BYOS) option; if needed, for BYOS, gather information about your storage.
7. Sign up for a free trial of SaaS Backup for Salesforce using your Salesforce account or your NetApp SSO account.
8. Configure Salesforce service.
9. Add production or sandbox instances.
10. Schedule your first back up.
11. If desired, backup your data immediately.


Do you have a free trial activation code?
No
Yes
Register for a free trial activation code
Do you have a Salesforce free developer edition account?
No
Yes
Sign up for a Salesforce free developer edition account
Do you want to use your current developer account for the free trial?
No
Yes
Sign up for a Salesforce sandbox account
Do you have a Salesforce system admin account?
No
Yes
Sign up for a Salesforce system admin account
Do you want to use your current system admin account for the free trial?
No
Yes
Are you using storage provided by SaaS Backup?
Gather information about your BYOS storage
No
Yes
Do you want to sign up using your NetApp SSO account?
Sign up for a free trial with a Salesforce account
No
Yes
Sign up for a free trial with a NetApp SSO account
Configure Salesforce service
Add a new production or sandbox instance
Schedule first backup
Optional: Perform an immediate backup

Free trial restrictions

The following restrictions apply to free trial accounts:

- A maximum of one production instance.
- A maximum of one sandbox instance.
- A maximum of three immediate backups per day.
- Automated backups for only the first 30 days.
- No scheduled backups are allowed during the 15-day grace period after the free trial ends.

Registering an activation code for a free trial of SaaS Backup for Salesforce

To get started with SaaS Backup for Salesforce, you must get an activation code and then sign up. You may have received an activation code from your sales representative or channel partner. If not, you can get an activation code by signing up for the free trial.

Steps

1. Click here to go to the SaaS Backup for Salesforce free-trial URL.
2. Enter the requested registration information and click **Submit**.

   After you submit the form, you will receive an email containing your free-trial activation code. You will need the activation code when you sign up for SaaS Backup with Salesforce.

Signing up for a Salesforce free developer edition account

With a free Salesforce developer edition account, you can discover the latest features of Salesforce and SaaS Backup for Salesforce.

Steps

1. Click here to start your free Salesforce developer edition account.
2. Fill in the requested information, accept the Terms of Use, and click **Sign me up** to complete the sign-up process.
3. Go to your email account to confirm and verify your new account.
   The link provided will prompt you to create a password for your account.
4. In your newly created Salesforce developer account, you can move between the Lightning experience and the classic experience. To switch to the classic experience, click on the **View Profile**, then click on **switch to Salesforce classic**. This is optional.

   Note: Your new account will be prepopulated with sample objects and records.

Signing up for a Salesforce free sandbox account

A Salesforce sandbox account allows you to test the functionality of SaaS Backup for Salesforce in a test environment before implementing it with your production account.

Steps

1. Click here to start your free Salesforce sandbox account.
2. Fill in the requested information, accept the Terms of Use, and click **Sign me up** to complete the sign-up process.
3. Go to your email account to confirm and verify your new sandbox account.
   The link provided will prompt you to create a password for your account.
4. In your newly created Salesforce sandbox account, you can move between the Lightning experience and the classic experience. To switch to the classic experience, click on the **View Profile**, then click on **switch to Salesforce classic**. This is optional.
5. Click on the **Setup** tab.
6. In the search bar, search **Users** and select **Users**.
   The name for the user profile **system administrator** is your email for this account.
7. Select this email and **reset the password**.
   This is a required step because the sign-up does not give you the email and password to login.
8. After you reset the password, you can use this email and password to login to the sandbox.

Your new account will be prepopulated with sample objects and records.

Creating a Salesforce system administrator account

When you sign up for SaaS Backup for Salesforce, you can use your existing Salesforce system administrator account, or you can create a new one.

Steps

1. Log in to Salesforce with your existing system admin account.
2. To switch to the classic experience, click on **View Profile**, then click **switch to Salesforce classic**. This is optional.
3. Click on the **Setup** tab.
4. Under **Administer**, click **Manage Users** and then click **Users**.

5. Under **Users**, click **New User**.

6. Fill in the requested information with the following guidance:
    a. Keep the **Role** empty.
    b. Under **User license**, choose **Salesforce**.
    c. Under **Profile**, choose **System Administrator**.
    d. Check the following:
        ☑ Marketing
        ☑ Offline
        ☑ Service Cloud
        ☑ Salesforce CRM content users.
7. Click **Save**.
8. In **Users**, click on your newly created account and click **Reset Password**.
9. Go to your email account to confirm and verify your new account.
   The link provided will prompt you to create a password for your account.
10. Log in to Salesforce using your new account credentials to activate the account.

Information to gather about your Bring Your Own Storage (BYOS) option

If you choose to use Amazon S3, you do not need to gather any information before signing up. If you are providing your own Amazon S3 bucket, you must gather the following information about your storage before signing up.

- Bucket name
- Region
- Access key
- Secret key

Signing up for for a free trial of SaaS Backup for Salesforce

You can sign up for SaaS Backup with Salesforce or with your NetApp SSO account.

To complete sign-up process, you must have the activation code supplied when you purchased your SaaS Backup license or the activation code supplied when you signed up for a free-trial version.

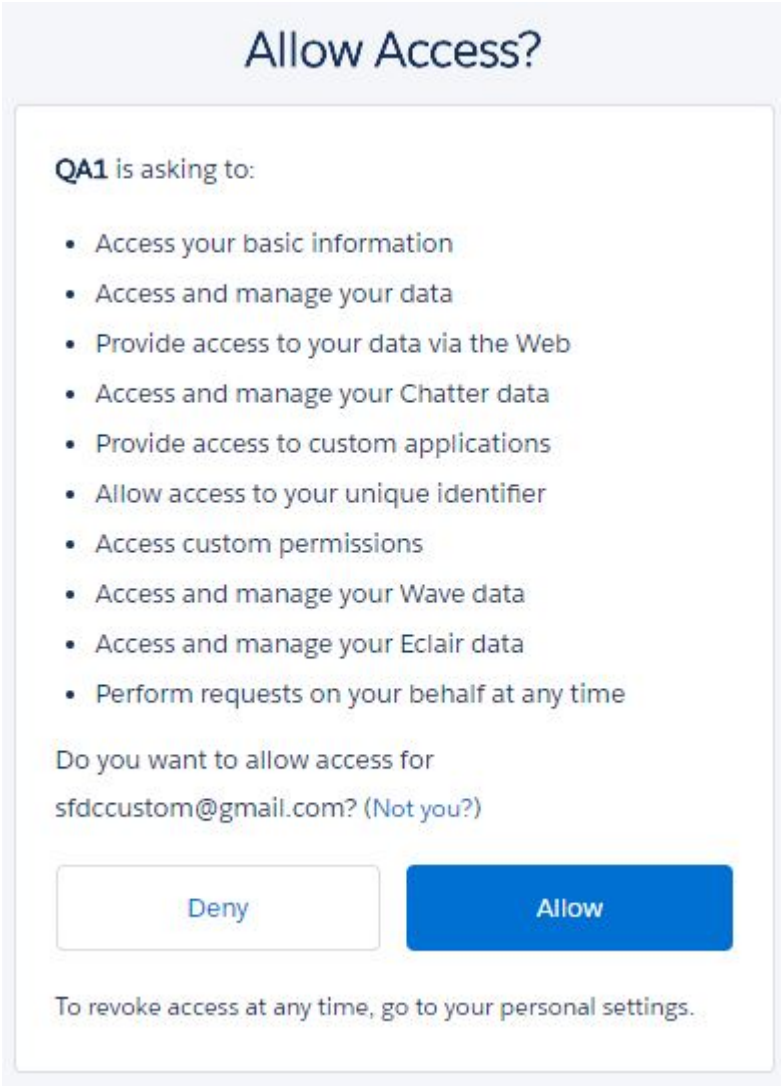
Signing up for SaaS Backup with Salesforce

Steps

1. Enter the SaaS Backup URL into your web browser:
   https://saasbackup.netapp.com
2. Click **Sign up** at the bottom of the page.
3. Select your region.
4. Read and accept the Terms of Service.

5. Click Salesforce.

6. Enter your username and password for your Salesforce account with system administrator privileges and click **LOG IN**.
7. Click **Allow** to grant SaaS backup access to your Salesforce organization.



8. Complete the registration form and click **Sign Up**.
9. Click **Salesforce**.
10. If you have a trial license, click **Preview**, enter your activation code and click **Next**.
11. Select your backup storage option.

You can to Bring Your Own Storage (BYOS) or you can use SaaS Backup provided storage. SaaS Backup only supports Amazon S3.

12. If you select SaaS Backup provided storage, select your region.

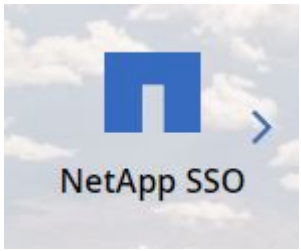
    If you selected a BYOS option, enter the requested information and click **Test Connection**.

13. Click **Next**.
14. Click **Save**.

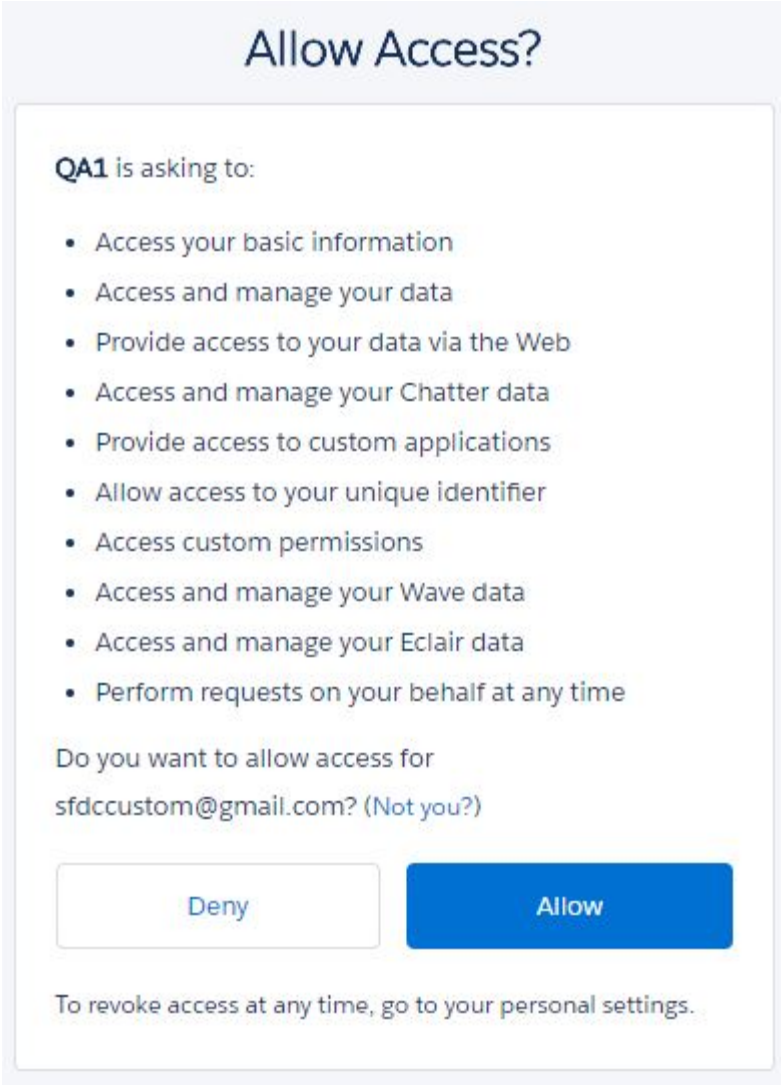
Signing up for SaaS Backup with NetApp SSO

Steps

1. Enter the SaaS Backup URL into your web browser:
   https://saasbackup.netapp.com
2. Accept the End-User-License Agreement.
3. Click **Sign up** at the bottom of the page.
4. Click NetApp SSO.



5. Enter your NetApp SSO and password, and then click **LOG IN**.
6. Click **Allow** to grant SaaS backup access to your Salesforce organization.



7. Complete the registration form and click **Sign Up**.
8. Click **Salesforce**.
9. If you have a trial license, click **Preview**, enter your activation code and click **Next**.
10. Select your backup storage option.

    You can to Bring Your Own Storage (BYOS) or you can use SaaS Backup provided storage. SaaS Backup only supports Amazon S3.

11. If you select SaaS Backup provided storage, select your region.

    If you selected a BYOS option, enter the requested information and click **Test Connection**.

12. Click **Next**.
13. Click **Save**.

Configuring the Salesforce service

After signing up for SaaS Backup for Salesforce, you must configure the Salesforce service.

Steps

1. From the left-pane navigation, click **Services**
   

2. Click  to add the service.
3. Select **Salesforce**.
   

4. Select the subscription type.
5. Enter the activation code.
6. Select your backup destination.
7. Click **Next**.
8. Click **Save**.

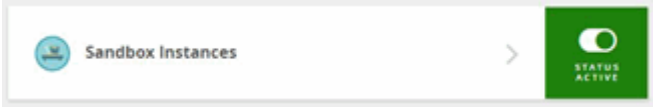
Adding a new Production or Sandbox Instance

After configuring SaaS Backup for Salesforce, you add a new production or sandbox instance.

Steps

1. From the left-pane navigation, click **Services**.
   

2. If you want to add a Production Instance, click **Production Instances**.
   

   If you want to add a Sandbox Instance, click **Sandbox Instances**.
   

3. In the top right corner, click the blue  to add a new instance.
4. Under **Add an Organization**, click **Submit**.
5. Enter your system administrative credentials to add the instance.
   A production organization is automatically added to the tier 1 backup policy and an immediate backup is scheduled.

Scheduling a backup or changing backup frequency

If you add a Sandbox Instance in SaaS Backup for Salesforce, by default, all data in the Sandbox is unprotected until you manually move it to a protected backup tier. After data in your Sandbox or Production Instance is protected, you can choose at any time to move

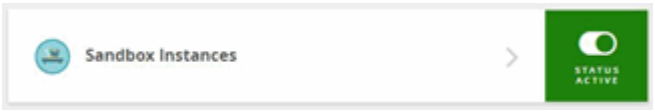
it to a different backup tier.

Steps

1. From the left-pane navigation, click **Services**.

2. If you want to move an organization in your Production Instance, click **Production Instances**.

If you want to move an organization in your Sandbox Instance, click **Sandbox Instances**.



3. Select the correct instance category for the organization you want to move.
   - Click the number above **PROTECTED INSTANCES**, if the organization you want to move is currently protected by a backup policy.
   - Click the number above **PENDING INSTANCES**, if the backup status of the organization you want to move is pending,
   - Click the number above **UNPROTECTED INSTANCES**, if the organization you want to move is currently unprotected by a backup policy.
4. Select the new tier.
   Only tier 2 and tier 3 backups are available for Sandbox Instances. Sandbox Instances cannot be backed up under the tier 1 policy. Production Instances can either be in the tier 1 policy or unprotected. Production Instances cannot be backed up under the tier 2 or tier 3 policies.
   The organization is moved to the new backup tier.

Performing an immediate backup

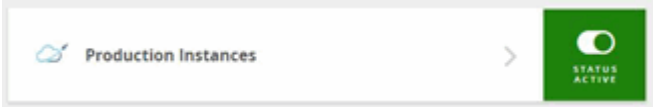
You can perform an immediate backup of your production or sandbox instance any time you deem necessary for data protection.

For the trial version of SaaS Backup for Salesforce, you can only perform three immediate backups per day.

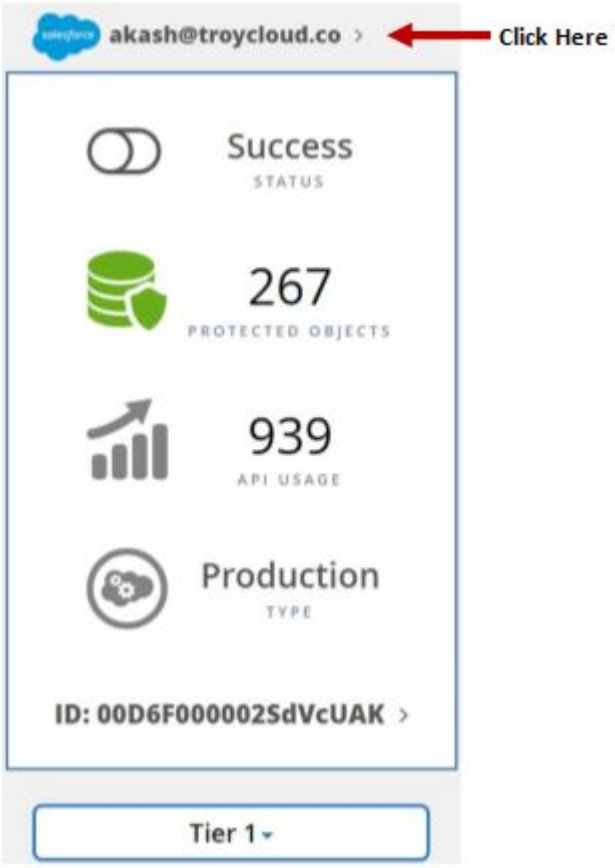
Steps

1. From the left-pane navigation, click **Services**.

2. Click **Production Instances** or **Sandbox Instances**.



3. Select the correct instance you want to backup now.
   a. Click the number above **PROTECTED INSTANCES**, if the instance you want to back up is currently protected by a backup policy.
   b. Click the number above **PENDING INSTANCES**, if the backup status of the instance you want to back up is pending,
   c. Click the number above **UNPROTECTED INSTANCES**, if the instance you want to backup is currently unprotected by a backup policy.
4. Click the name of the organization.



5. Click **Backup Now**.
   A message appears indicating the selected organizations are being placed in the backup queue.
6. Click **Submit**.

Upgrading from a free trial

To upgrade from a free trial, you must have the serial number issued with your paid subscription.

Steps

1. In the top left corner of the dashboard, click  .

2. Under **SERVICE SETTINGS**, select **Salesforce**.
3. Next to **SUBSCRIPTION DETAILS**, click **Update**.
4. Select **NetApp License**.
5. Enter your user name, password, and the serial number for your license.
6. Click **Validate Subscription**.
   A confirmation of your license information is displayed.

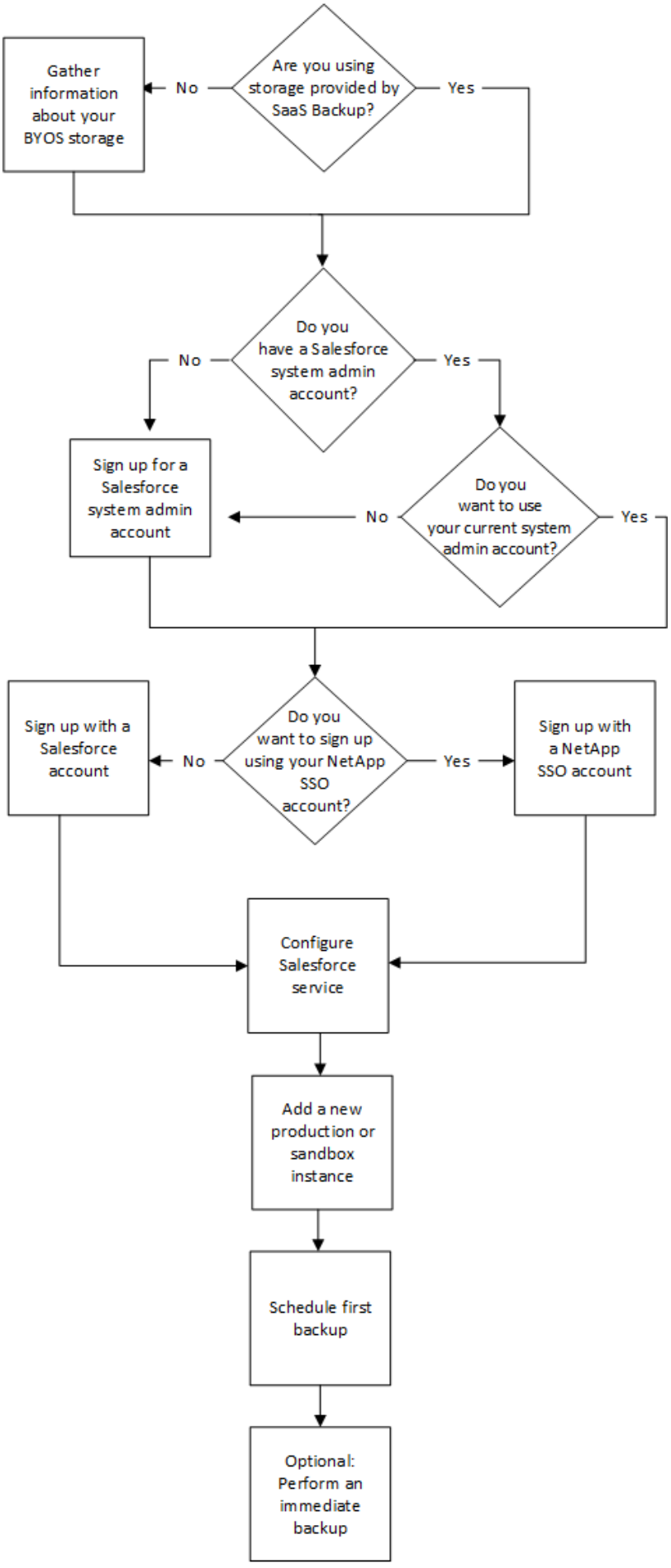
Getting started with a paid subscription

Workflow for getting started with a paid subscription of SaaS Backup for Salesforce

To get started with a paid subscription of SaaS Backup for Salesforce, you must do the following:

Steps

1. Have an activation code.
2. Decide if you will use Amazon S3 storage provided by SaaS Backup or if you will use a Bring Your Own Storage (BYOS) option; if needed, for BYOS, gather information about your storage.
3. If you don't already have a Salesforce system admin account, create one.
4. Sign up for a paid subscription of SaaS Backup for Salesforce using your Salesforce account or your NetApp SSO account.
5. Configure Salesforce service.
6. Add production or sandbox instances.
7. Schedule your first back up.
8. If desired, backup your data immediately.


Are you using storage provided by SaaS Backup?
No
Gather information about your BYOS storage
Yes
Do you have a Salesforce system admin account?
No
Sign up for a Salesforce system admin account
Yes
Do you want to use your current system admin account?
No
Yes
Do you want to sign up using your NetApp SSO account?
No
Sign up with a Salesforce account
Yes
Sign up with a NetApp SSO account
Configure Salesforce service
Add a new production or sandbox instance
Schedule first backup
Optional: Perform an immediate backup

Information to gather about your Bring Your Own Storage (BYOS) option

If you choose to use Amazon S3, you do not need to gather any information before signing up. If you are providing your own Amazon S3 bucket, you must gather the following information about your storage before signing up.

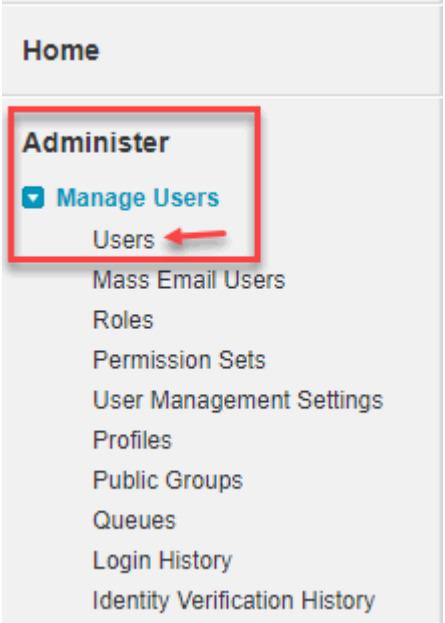
- Bucket name
- Region
- Access key
- Secret key

Creating a Salesforce system administrator account

When you sign up for SaaS Backup for Salesforce, you can use your existing Salesforce system administrator account, or you can create a new one.

Steps

1. Log in to Salesforce with your existing system admin account.
2. To switch to the classic experience, click on **View Profile**, then click **switch to Salesforce classic**. This is optional.
3. Click on the **Setup** tab.
4. Under **Administer**, click **Manage Users** and then click **Users**.



5. Under **Users**, click **New User**.
6. Fill in the requested information with the following guidance:
   a. Keep the **Role** empty.
   b. Under **User license**, choose **Salesforce**.
   c. Under **Profile**, choose **System Administrator**.
   d. Check the following:

- ☑ Marketing
- ☑ Offline
- ☑ Service Cloud
- ☑ Salesforce CRM content users.

7. Click **Save**.
8. In **Users**, click on your newly created account and click **Reset Password**.
9. Go to your email account to confirm and verify your new account.
   The link provided will prompt you to create a password for your account.
10. Log in to Salesforce using your new account credentials to activate the account.

Signing up for a paid subscription of SaaS Backup for Salesforce

You can sign up for a paid subscription of SaaS Backup with Salesforce or with your NetApp SSO account.

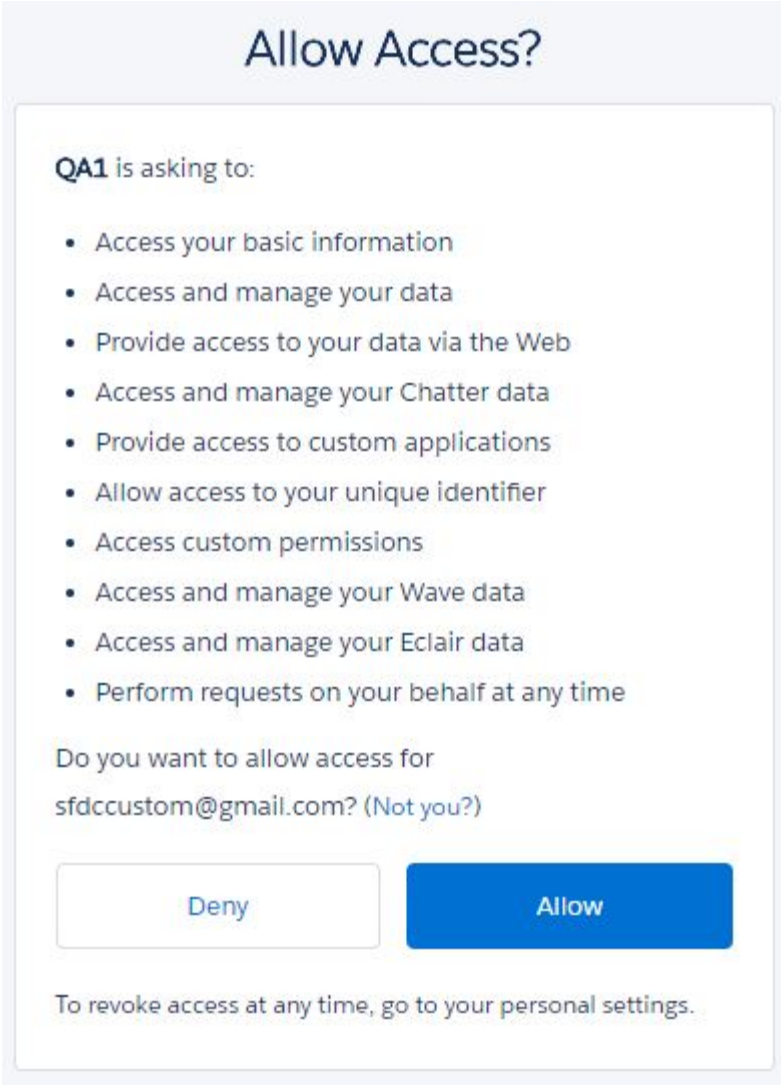
To complete sign-up process, you must have the serial number supplied when you purchased your SaaS Backup license or the activation code supplied when you signed up for a free-trial version.

Signing up for SaaS Backup with Salesforce

Steps

1. Enter the SaaS Backup URL into your web browser:
   https://saasbackup.netapp.com
2. Click **Sign up** at the bottom of the page.
3. Select your region.
4. Read and accept the Terms of Service.
5. Click Salesforce.

6. Enter your username and password for your Salesforce account with system administrator privileges and click **LOG IN**.
7. Click **Allow** to grant SaaS backup access to your Salesforce organization.



8. Complete the registration form and click **Sign Up**.
9. Click **Salesforce**.

   If you have a paid subscription, click **Licensed**. Enter your user name, password, and the serial number of your license and click **Validate Subscriptions**.

10. Select your backup storage option.

    You can to Bring Your Own Storage (BYOS) or you can use SaaS Backup provided storage. SaaS Backup only supports Amazon S3.

11. If you select SaaS Backup provided storage, select your region.

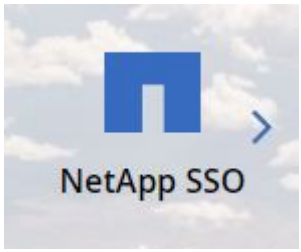
    If you selected a BYOS option, enter the requested information and click **Test Connection**.

12. Click **Next**.
13. Click **Save**.

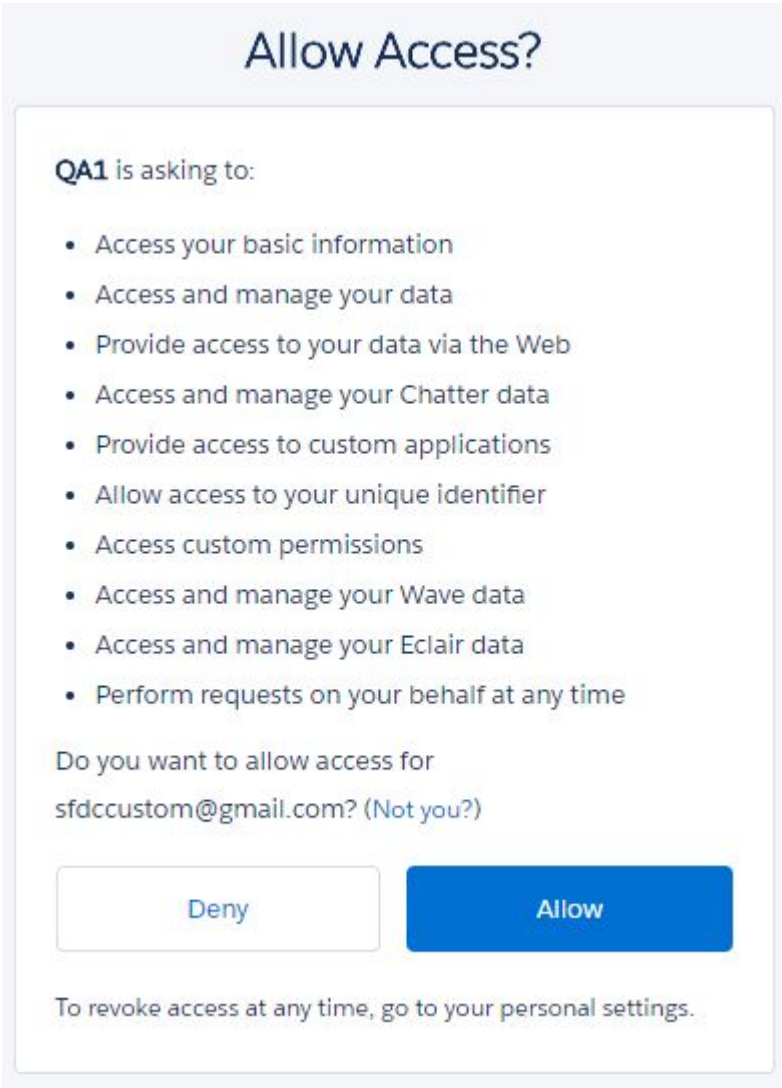
Signing up for SaaS Backup with NetApp SSO

Steps

1. Enter the SaaS Backup URL into your web browser:
   https://saasbackup.netapp.com
2. Accept the End-User-License Agreement.
3. Click **Sign up** at the bottom of the page.
4. Click NetApp SSO.



5. Enter your NetApp SSO and password, and then click **LOG IN**.
6. Click **Allow** to grant SaaS backup access to your Salesforce organization.



7. Complete the registration form and click **Sign Up**.
8. Click **Salesforce**.

If you have a paid subscription, click **Licensed**. Enter your user name, password, and the serial number of your license and click **Validate Subscriptions**

9. Select your backup storage option.

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10. If you select SaaS Backup provided storage, select your region.

    If you selected a BYOS option, enter the requested information and click **Test Connection**.

11. Click **Next**.
12. Click **Save**.

Performing an immediate backup

You can perform an immediate backup of your production or sandbox instance any time you deem necessary for data protection.

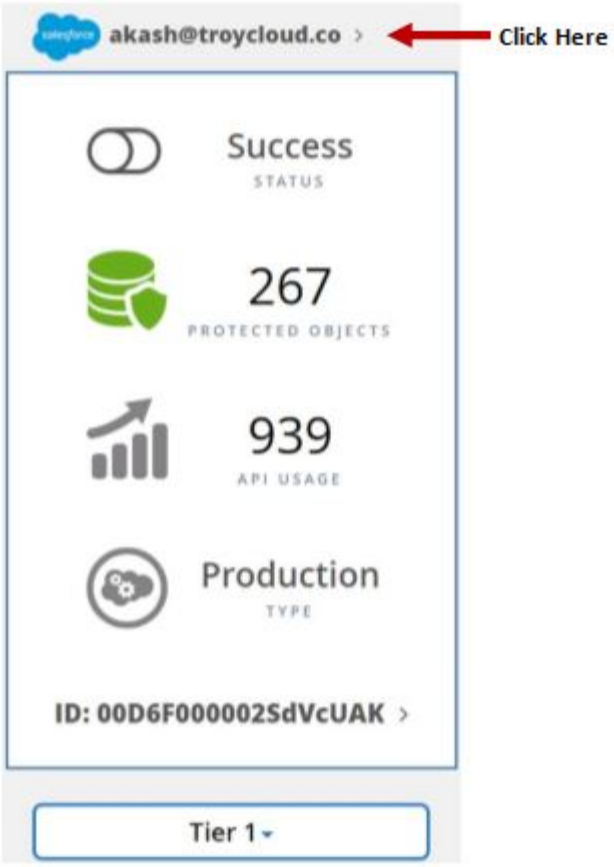
For the trial version of SaaS Backup for Salesforce, you can only perform three immediate backups per day.

Steps

1. From the left-pane navigation, click **Services**.

2. Click **Production Instances** or **Sandbox Instances**.

3. Select the correct instance you want to backup now.
   a. Click the number above **PROTECTED INSTANCES**, if the instance you want to back up is currently protected by a backup policy.
   b. Click the number above **PENDING INSTANCES**, if the backup status of the instance you want to back up is pending,
   c. Click the number above **UNPROTECTED INSTANCES**, if the instance you want to backup is currently unprotected by a backup policy.
4. Click the name of the organization.



5. Click **Backup Now**.
   A message appears indicating the selected organizations are being placed in the backup queue.
6. Click **Submit**.

Managing SaaS Backup for Salesforce

Backup policies

SaaS Backup for Salesforce has three predefined tiers of backup policies. These policy tiers vary in backup frequency and data retention period. Production Instances can only be protected by the tier 1 policy. Sandbox Instances can be protected by the tier 2 and tier 3 policies.

Backup policies with an **Active** status are polices to which items have been assigned for backup. Backup polices with an **Inactive** status do not have items assigned for backup.

Backup policy	Backup frequency	Default data retention period	Available to protect
Tier 1	Once every 12 hours	3 years	Production Instance
Tier 2	Once every 18 hours	2 years	Sandbox Instance
Tier 3	Once every 24 hours	2 years	Sandbox Instance
Unprotected	Not backed up	Not backed up	Production and Sandbox Instances

Performing an immediate backup

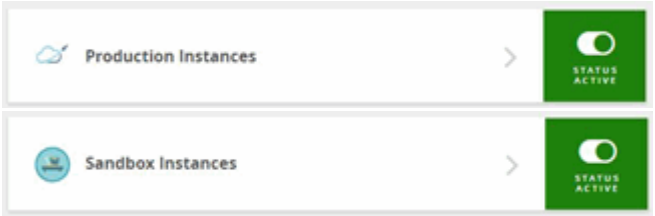
You can perform an immediate backup of your production or sandbox instance any time you deem necessary for data protection.

For the trial version of SaaS Backup for Salesforce, you can only perform three immediate backups per day.

Steps

1. From the left-pane navigation, click **Services**.

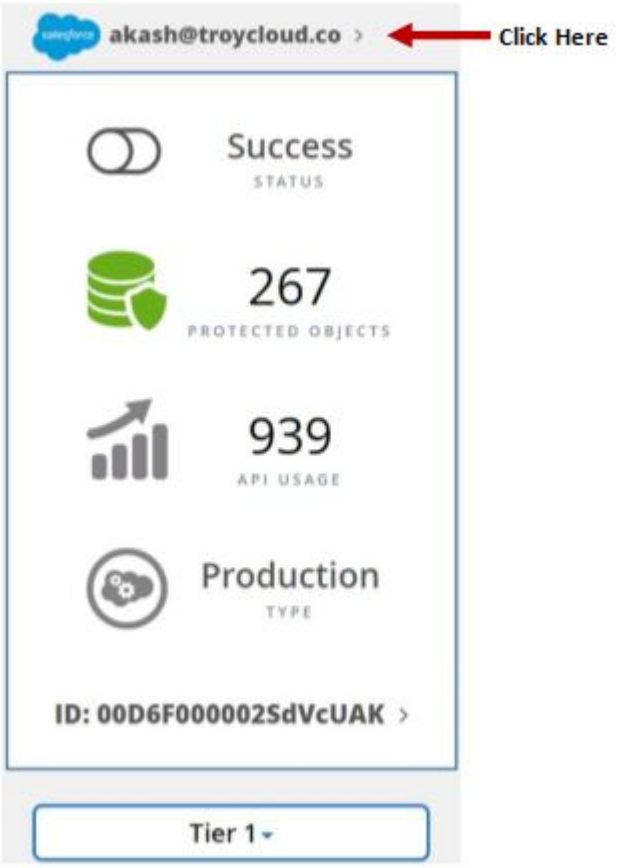
2. Click **Production Instances** or **Sandbox Instances**.



3. Select the correct instance you want to backup now.
   a. Click the number above **PROTECTED INSTANCES**, if the instance you want to back up is currently protected by a backup policy.
   b. Click the number above **PENDING INSTANCES**, if the backup status of the instance you want to back up is pending,

c. Click the number above **UNPROTECTED INSTANCES**, if the instance you want to backup is currently unprotected by a backup policy.

4. Click the name of the organization.



5. Click **Backup Now**.
   A message appears indicating the selected organizations are being placed in the backup queue.
6. Click **Submit**.

Enabling and disabling metadata backups

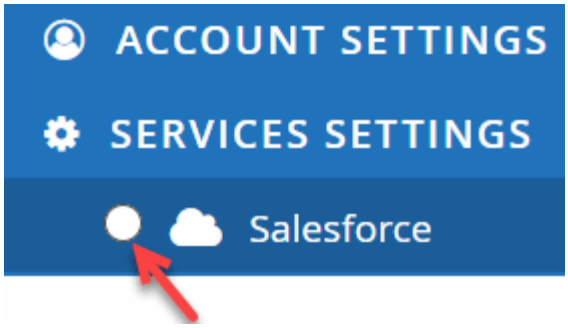
You can enable or disable metadata backups for Salesforce.

Enabling metadata backups

Enabling metadata backups provides metadata backups for all organizations within a tenant account.

Steps

1. Click  and select **Salesforce** under **Services Settings**.



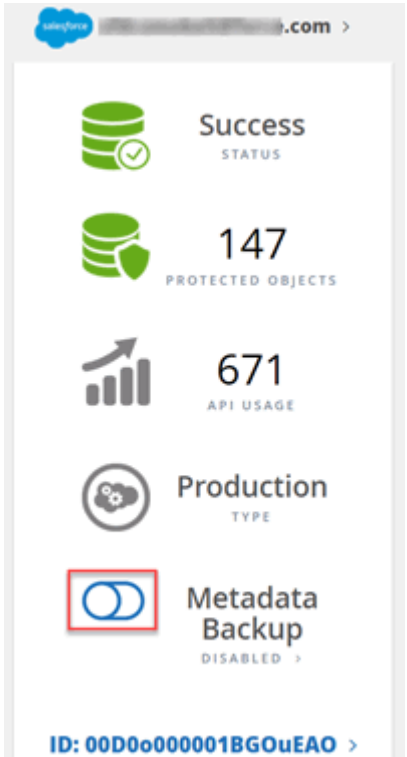
2. Click **Enable Metadata Backup** to turn the feature on.
   After enabled at the tenant level, metadata for all the organizations will be backed up.

Disabling metadata backups

You can disable metadata backups at the organization level. After metadata backups are enabled for all organizations, this allows you to control which organizations will not have metadata backups.

Steps

1. To disable metadata backups, go to **Services**.
2. Select **Production Instances** or **Sandbox Instances**.
3. Select the number of **Protected** instances.
4. Select the organization for which you want to disable metadata backups.
5. Click on **Metadata Backup** to turn the feature off.



Restoring data

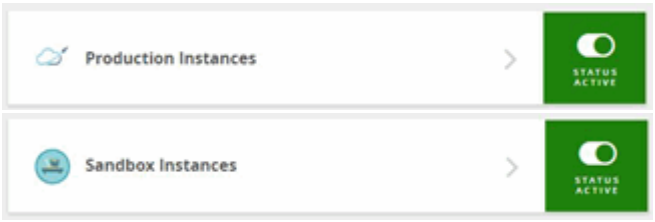
You can use SaaS Backup for Salesforce to restore data and metadata that you previously backed up.

Restoring the most recent backup

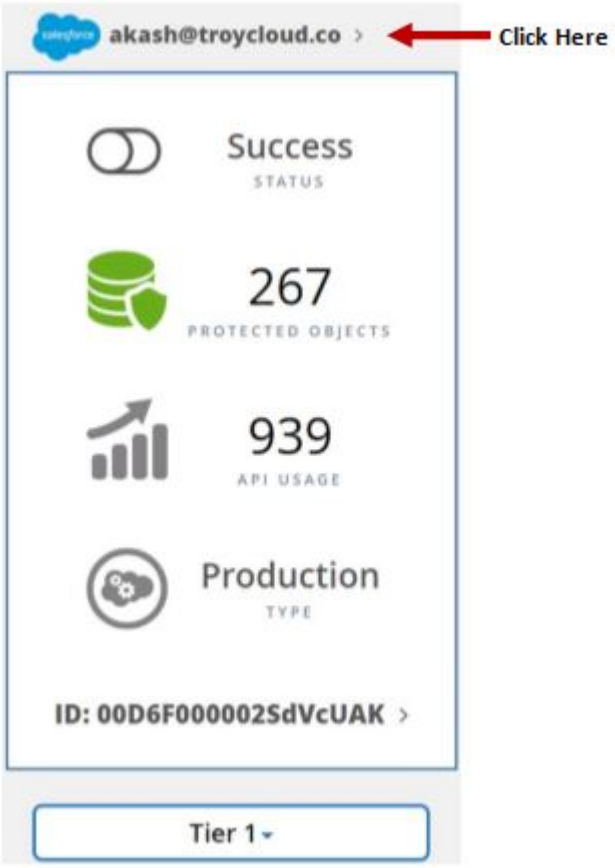
Steps

1. From the left-pane navigation, click **Services**.

2. Click **Production Instances** or **Sandbox Instances**.



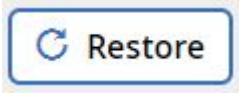
3. Click the number of **Protected Instances**.
4. Click the name of the organization.



A list of objects is displayed. Recoverable objects are shown by default. To view the Nonrecoverable objects select, “Include Non-recoverable objects." Nonrecoverable objects are indicated by a grey icon. The red icon represents items objects which failed to be backed up in the current backup, but are recoverable from previous backups.

Recoverable object	
Nonrecoverable object	
Failed object	

5. Click the object containing the individual records you want to restore, then search for the specific record.
6. Click **Restore**.



7. Select restore options.
   a. **Restore with overwrite** is selected by default.
   This option replaces the existing version of the record you are restoring. If you want to keep the current version of the record and the restored version of the record, deselect this option.
   b. **Restore relationship** restores the children of parent records along with the parent up to five levels. If you do not select to restore relationship, only the parent record is restored.
   c. **Export Data** allows you to export data from a backup at a specific point in time. You can export data at the object level or at the organization level. For more information about the export to data feature, go to Downloading export data.

Export jobs are only available for seven days after completion.

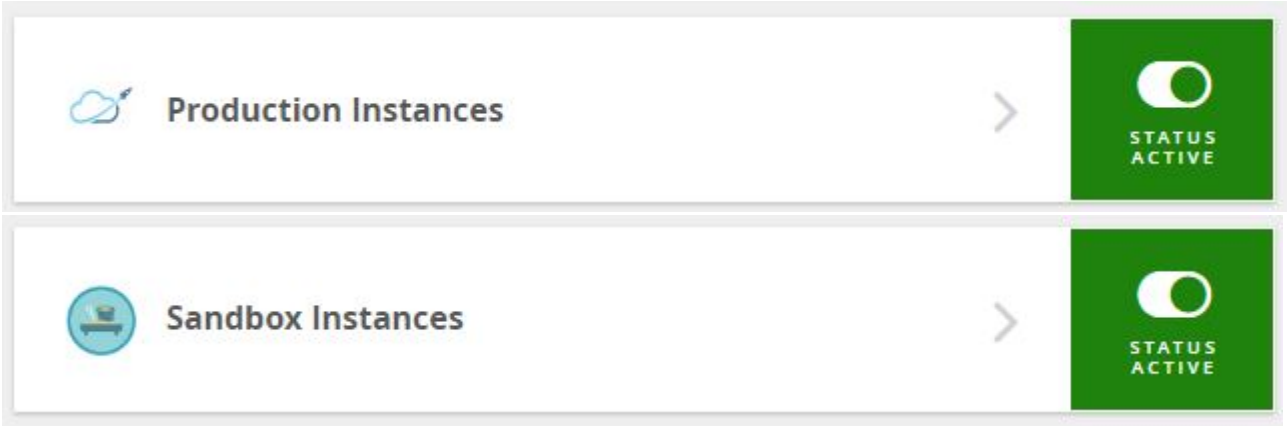
8. Click **Submit**.

Restoring from a previous backup

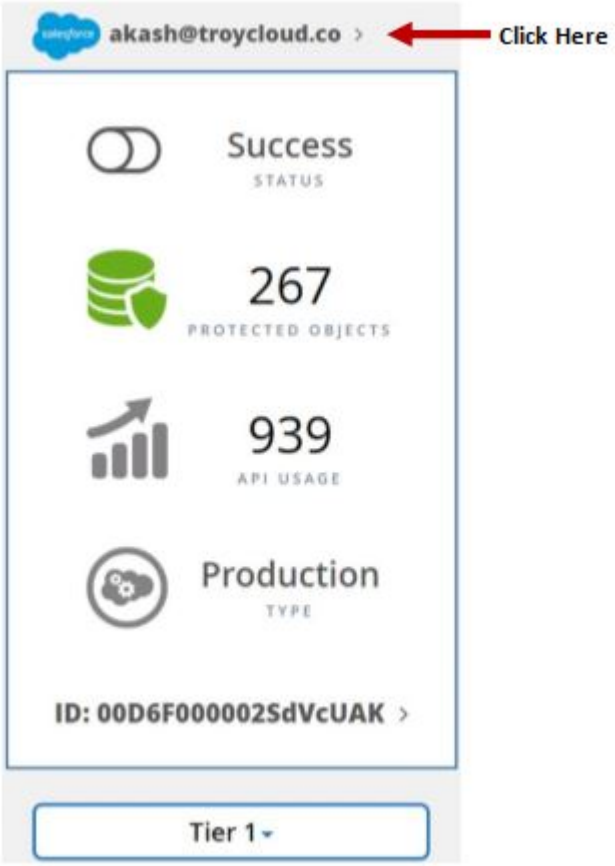
Steps

1. From the left-pane navigation, click **Services**.

2. Click **Production Instances** or **Sandbox Instances**.



3. Click the number of **Protected Instances**.
4. Click the name of the organization.



5. Click **View Backup History**.
6. Select to see backups for a specific range of time or to select a backup for a specific date.
   a. To select backups for a specific range of time, in the top right corner, click the drop-down menu next to **Show Selected Backups**, and select one of the predefined range of days.

   A list of backups that occurred during the selected range is displayed.
   b. To select a backup for a specific date, click the date of the backup on the calendar, then select the specific backup you want.
   The number in the red circle indicates the number of backups performed on that date. The individual green circles indicate the individual backups.
7. Click the object containing the individual records that you want to restore, then search for the specific record.
8. Click **Restore**.

9. Select restore options.
   a. **Restore with overwrite** is selected by default.
   This option replaces the existing version of the record you are restoring. If you want to keep the current version of the record and the restored version of the record, deselect this option.

b. **Restore relationship** restores the children of parent records along with the parent up to five levels. If you do not select to restore relationship, only the parent record is restored.

c. **Export Data** allows you to export data from a backup at a specific point in time. You can export data at the object level or at the organization level. For more information about the export to data feature, go to Downloading export data.

Export jobs are only available for seven days after completion.

10. Click **Submit**.
    A message appears indicating the selected organizations are being placed in the jobs queue.

Restoring metadata

You can restore metadata at the organization level or at the granular level.

Organization-level metadata restores

Steps

1. Go to **Services**.
2. Select **Production Instances** or **Sandbox Instances**.
3. Click the number of **Protected** instances.
4. Click the name of the organization.
5. Click **Restore**.
6. Select a restore option.

   a. To export your metadata, select **Export Metadata**.
   A zip file is created.

Export metadata jobs are available for 30 days after completion.

   b. To restore your metadata, select **Restore Metadata**.

7. Click **Submit**.

Granular-level metadata restores

Steps

1. Go to **Services**.
2. Select **Production Instances** or **Sandbox Instances**.
3. Click the number of **Protected** instances.
4. Click the name of the organization.
5. Click the tab **Metadata Types & Components**.
   A list of metadata types is displayed.
6. Select the metadata types you want to restore.
7. Click **Restore**.
8. Select a restore option.

[export and restore metadata restore options]

a. To export your metadata, select **Export Metadata**.
A zip file is created.

> Export metadata jobs are available for 30 days after completion.

b. To restore your metadata, select **Restore Metadata**.

9. Click **Submit**.

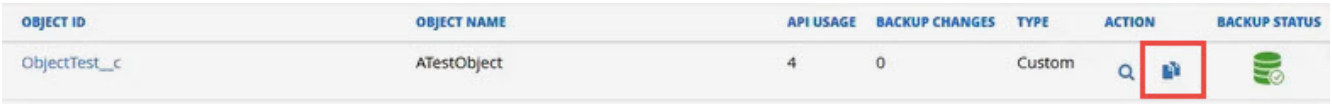
Comparing and restoring backup differences

You can use SaaS Backup for Salesforce to compare and restore backup differences.

Steps

1. From the left-pane navigation, click **Jobs**.

2. Under **Recent Completed Jobs**, select the backup containing the object for which you want to compare backups.
3. Click the organization.
4. Select the object for which you want to compare backups.
5. Click the compare icon.



6. Next to **Previous Backup**, select the first date of the backup you want to use for the comparison.
7. Next to **Current Backup**, select the second date of the backup you want to use for the comparison.
8. Click **COMPARE**.

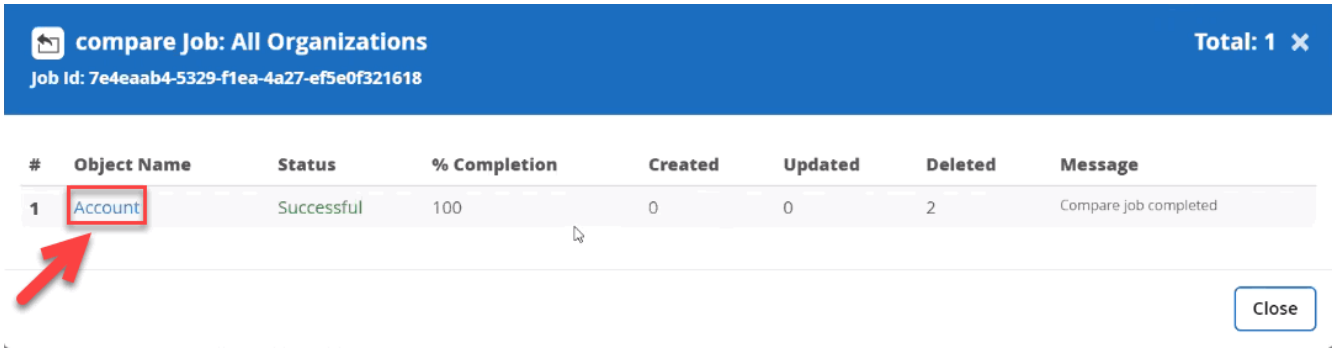
> If there are no differences between the two selected backups, the compare job is not created.

9. Click **View the Jobs progress**.

   Once the job is complete, it appears under **Recent Completed Jobs**.

10. Click either the number of organizations or number successful.

A window appears showing you the job status.



11. Click on the object name to see the results.
    The compare job summary is displayed along with the number of records created, updated, and deleted in the object between the two selected backups.
    You have the option to download the compare job details.
    a. To download the compare job details, click Download Compare Results.
    b. Unzip the file to see the results.
12. Click **RESTORE**.
13. Select **UPDATED** to restore all the updated records. Select **DELETED** to restore all the deleted records. You can also select both if the options is available.
14. Click **SUMBIT**.

    The job is restored without overwrite and without relationship.

Purging data and metadata

You can purge data from Salesforce organizations. Purging your data at the organization level is managed in **Account Settings**.

Metadata retention and purges are automatically managed by SaaS Backup for Salesforce. Metadata is retained for 90 days. After 90 days, the metadata is purged.

Purging Data

You always have the option to purge data from a specific organization such as an unused Salesforce organization.

You can purge data to refresh production or sandbox instances.

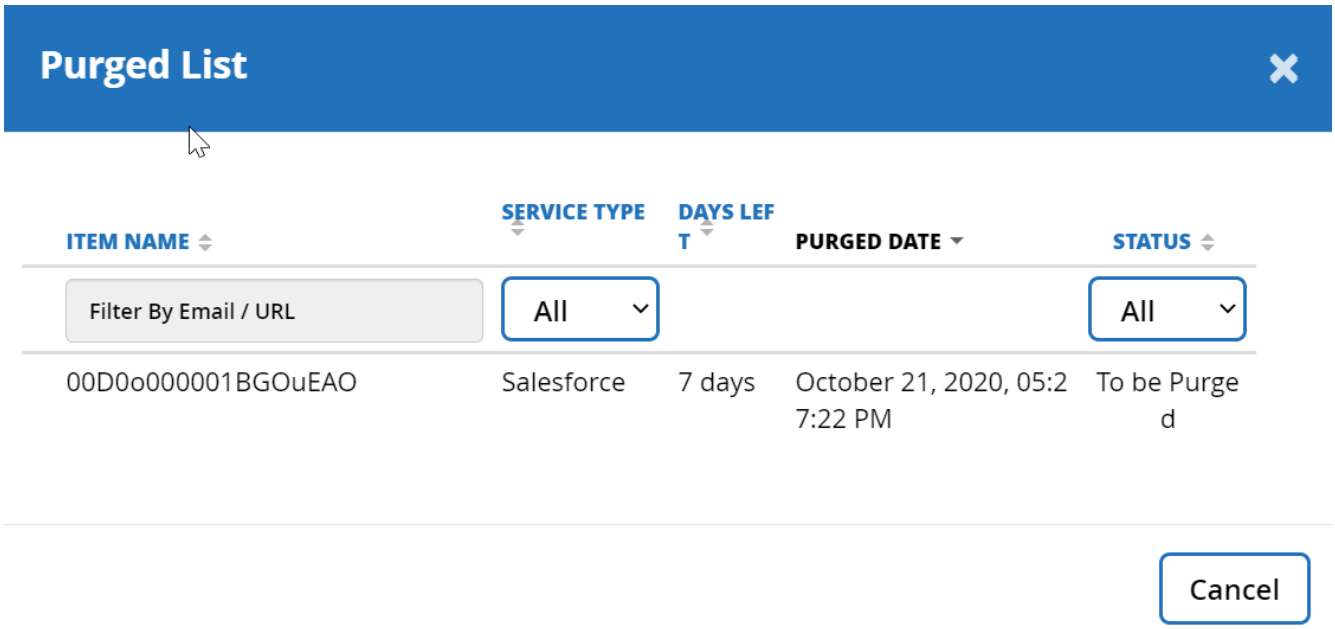
You may also want to add another production or sandbox instance. To do so, you must purge a production or sandbox instance.

Steps

1. Click  and then click  .

2. Click **Retain and Purge**.
3. Under **Retain and Purge**, scroll down to **Purge Data**.

4. Select the **Type of Provider** and **Service Name**.
5. Search or select the organization ID.
6. Click **Save**.
   A message pops up for you to confirm or cancel the purge.
7. Click **Yes** to confirm the purge. If you click **Yes**, you can recover the purged data for up to seven days.
8. Click **Show Purged List** to see a list of scheduled purges.



Reauthenticating

Salesforce allows usage of a maximum of 5 tokens before you must reauthenticate your credentials. If you attempt to initiate a backup or restore and all your tokens have been used, you receive the following error message: “expired access/refresh token”. If you receive this message, you must reauthenticate before proceeding.

Steps

1. In the top left corner of the dashboard, click  .
2. Under **SERVICE SETTINGS**, select **Salesforce**.
3. Click **GRANT ACCESS PERMISSIONS**.

4. Click the **PRODUCTION** or **SANDBOX** tab to select the instance you need to reauthenticate.
5. Click  .

You are redirected to **Salesforce** to enter your credentials. After reauthenticating, you can initiate your backup or restore job.

Canceling a job

You can cancel an immediate backup or restore. You cannot cancel a scheduled backup.

Steps

1. Click **Jobs** on the left navigation pane.
2. Under **Recent Running Jobs**, find the job that you want to cancel.
3. Click **Cancel**.

Viewing data

Viewing job history

You can view a list of all jobs completed, canceled, or failed within SaaS Backup for Salesforce.

Steps

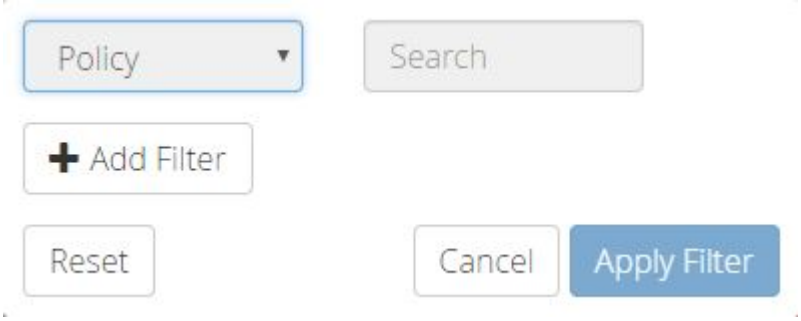
1. From the left-pane navigation, click **Reporting**.

   The job history is displayed.
2. In the top right corner, click **Filter**.

3. Select the Filter you would like to use to refine the reporting results.
   You can filter by backup policy, service, or job type.
4. Click inside the **Search** box and select the specific backup policy, service, or job type for which you want to see results. Add additional filters as needed.

5. Click **Apply Filter**.

Viewing the activity log

You can view a list of all activity performed inside of SaaS Backup for Salesforce.

Steps

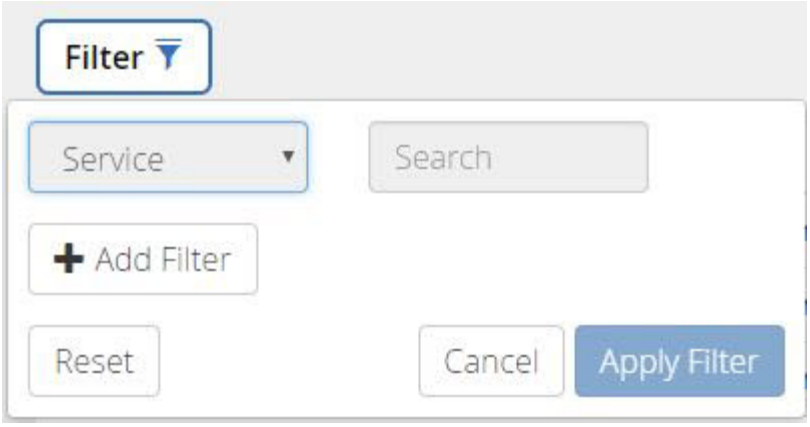
1. From the left-pane navigation, click **Reporting**.

2. Click **Activity Log**.
3. To filter the results, click **Filter**.

4. Select the Filter you would like to use to refine the reporting results.
   You can filter by service or event.



5. Click inside the **Search** box and select the specific service or event for which you want to see results. Add additional filters as needed.
6. Click **Apply Filter**.

Downloading the activity log

You can download the activity log to a .csv file.

Steps

1. From the left-pane navigation, click **Reporting**.

2. Click **Activity Log**.
3. Click **Download**.

The activity log is downloaded as a .csv file.

Downloading export data

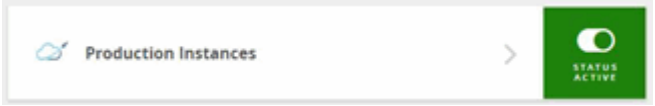
You can export data at the object and organization level. For each export, you can download attachments, results, and statistics from a previous backup.

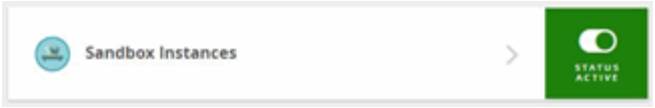
Object-level export

Steps

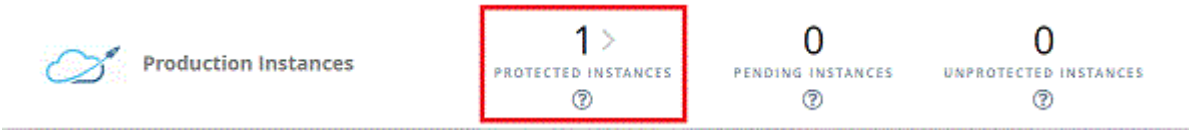
1. From the left-pane navigation, click **Services**.

2. Click **Production Instances** or **Sandbox Instances**.

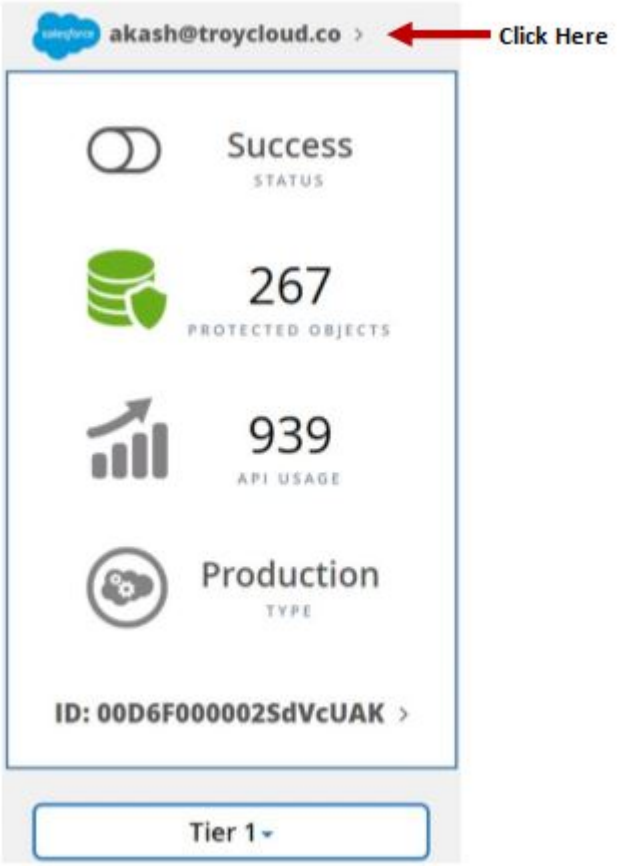




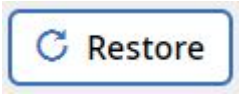
3. Click the number of **Protected Instances**.



4. Click the name of the organization.



5. Select the objects you want to export and click **Restore**.



6. If needed, select **Restore Relationships** or **Restore Files/Attachments** to include them in your export.

> If you select **Restore Relationships**, then the job exports the selected object and all its relationship objects. If you do not select **Restore Relationships**, then the job exports only the selected objects.

7. Click **Submit**.
8. Click **Jobs** from the left-pane navigation to view your restore job.
9. Click on **Total Objects** or **Successful** to see the job details and the download options.
    a. For export jobs with **Restore Files/Attachments**, you have three download options:
        i.

For results, click Export Data Download Link.

A. In your finder, locate the downloaded .tar.gz file.
B. Unzip the file to get a .tar file.
C. Extract the .tar file to see the EXCEL results.

ii. For attachments, click Attachments Download Link.

A. In your finder, locate the downloaded .tar.gz file.
B. Unzip the file to get a .tar file.
C. Extract the .tar file to see the attachments.

iii. For a statistics report, click Download.

b. For export jobs without **Restore Files/Attachments**, you have two download options:

i. For results, click Export Data Download Link.

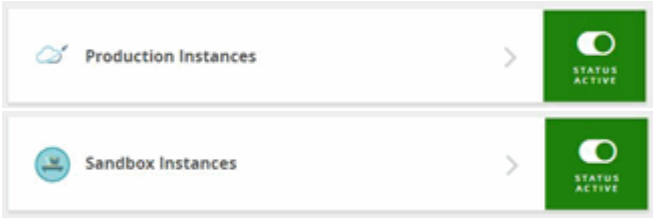
ii. For a statistics report, click Download.

Organization-level export

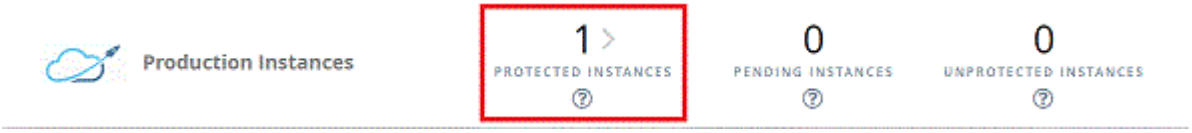
Steps

1. From the left-pane navigation, click **Services**.

2. Click **Production Instances** or **Sandbox Instances**.

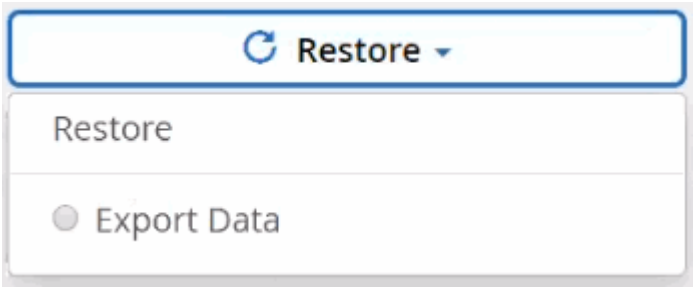


3. Click the number of **Protected Instances**.



4. Select the **Tier**.

5. Click **Restore** and then **Export Data** option.



6. If needed, click **Restore Files/Attachments** to include them in your export.
7. Click **Submit**.
8. Click **Jobs** from the left-pane navigation to view your restore job.
9. Click on **Total Organizations** or **Successful** to see the job details and the download options.
    a. For export jobs with **Restore Files/Attachments**, you have three download options:
        i. For results, click **Export Data Download Link**.
            A. In your finder, locate the downloaded .tar.gz file.
            B. Unzip the file to get a .tar file.
            C. Extract the .tar file to see the EXCEL results.
        ii. For attachments, click **Attachments Download Link**.
            A. In your finder, locate the downloaded .tar.gz file.
            B. Unzip the file to get a .tar file.
            C. Extract the .tar file to see the attachments.
        iii. For a statistics report, click **Download**.
    b. For export jobs without **Restore Files/Attachments**, you have two download options:
        i. For results, click **Export Data Download Link**.
        ii. For a statistics report, click **Download**.

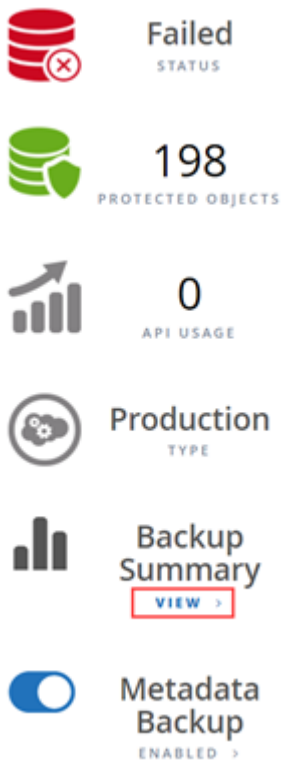
Viewing backup records

You can check the number of your backup records in SaaS Backup for Salesforce.

The first full backup provides the total number of backup records at the organization level. After this first backup, you can view the total number of created, updated, and deleted records from the **Backup summary**.

Steps

1. From the dashboard, click the number of protected instances (production or sandbox).
2. Click **view** under **Backup Summary**.



3. View the number of created and deleted records and the record count of all record changes in the table.

OBJECT NAME	CREATED	DELETED	RECORD COUNT	TYPE
1234567890zwexhubnjkmle w7quxuwi xshbggg	0	0	0	Custom
Account	76	0	76	Standard
Account Brand	0	0	0	Standard
Account Contact Relationship	20	0	20	Standard

- **Object name** - Includes all objects in the organization.
- **Created** - All created and updated records.
- **Deleted** - All deleted records.
- **Record count** - The total number of backup changes for an object.

Providing feedback

Your feedback about the NetApp SaaS Backup for Salesforce product helps us serve you better. You can provide feedback from inside SaaS Backup.

Steps

1. Click 

on the left pane navigation.
2. Select **Feedback**.
3. Complete the short feedback survey.
4. Click **Submit**.

If you want to be notified automatically when production-level documentation is released or important changes are made to existing production-level documents, follow Twitter account @NetAppDoc.

Where to get help and find more information

You can get help and find more information in the NetApp SaaS Backup for Salesforce community forum and knowledge base articles.

These resources can be accessed inside SaaS Backup through the **Support** link on the navigation menu.

You can also email the SaaS Backup support team at saasbackupsupport@netapp.com.

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