



Getting started with a paid subscription

SaaS Backup For Salesforce

NetApp
May 31, 2021

This PDF was generated from https://docs.netapp.com/us-en/salesforce/concept_paid_subscription_workflow.html on May 31, 2021. Always check docs.netapp.com for the latest.

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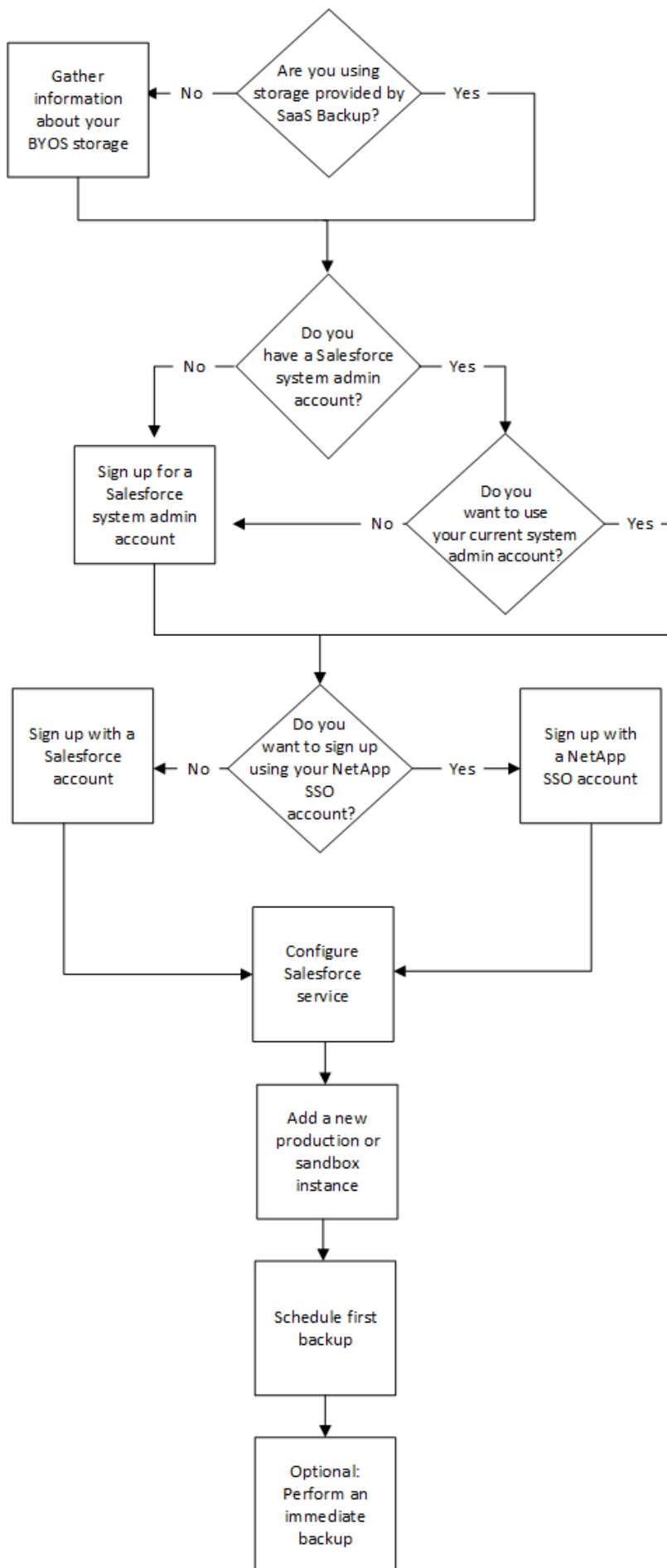
Getting started with a paid subscription

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](#).



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.

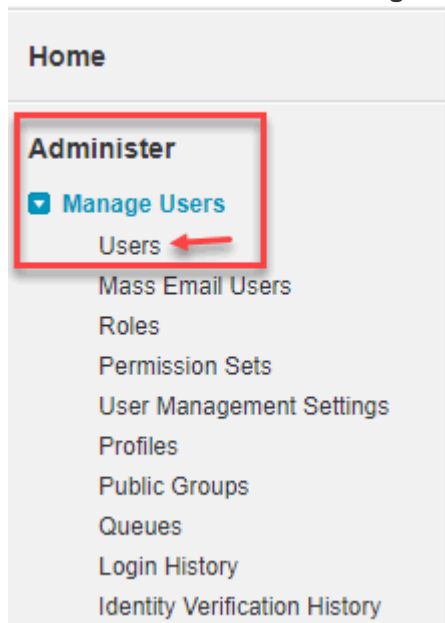
- Bucket name
- Region
- Access key
- Secret key

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:

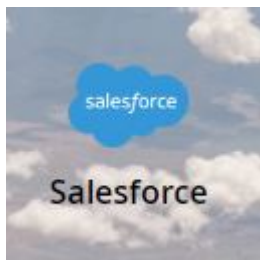
<https://saasbackup.netapp.com>

2. Click **Sign up** at the bottom of the page.

3. Select your region.

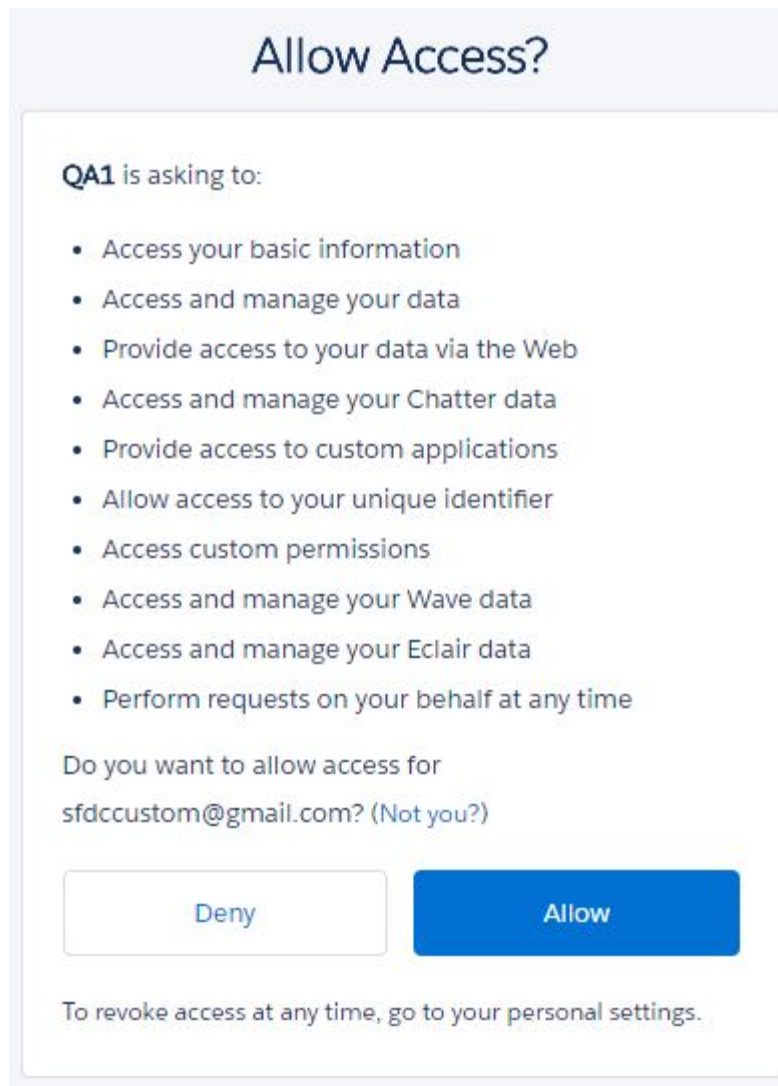
4. Read and accept the Terms of Service.

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.

A screenshot of a Salesforce 'Allow Access?' dialog box. The title 'Allow Access?' is at the top in a large, dark blue font. Below it, the text 'QA1 is asking to:' is followed by a bulleted list of permissions: 'Access your basic information', 'Access and manage your data', 'Provide access to your data via the Web', 'Access and manage your Chatter data', 'Provide access to custom applications', 'Allow access to your unique identifier', 'Access custom permissions', 'Access and manage your Wave data', 'Access and manage your Eclair data', and 'Perform requests on your behalf at any time'. Below the list, it asks 'Do you want to allow access for sfdccustom@gmail.com? (Not you?)'. At the bottom, there are two buttons: 'Deny' (white with a blue border) and 'Allow' (solid blue). Below the buttons, a link says 'To revoke access at any time, go to your personal settings.'

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.

Allow Access?

QA1 is asking to:

- Access your basic information
- Access and manage your data
- Provide access to your data via the Web
- Access and manage your Chatter data
- Provide access to custom applications
- Allow access to your unique identifier
- Access custom permissions
- Access and manage your Wave data
- Access and manage your Eclair data
- Perform requests on your behalf at any time

Do you want to allow access for
sfdccustom@gmail.com? (Not you?)

DenyAllow

To revoke access at any time, go to your personal settings.

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.

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

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**.

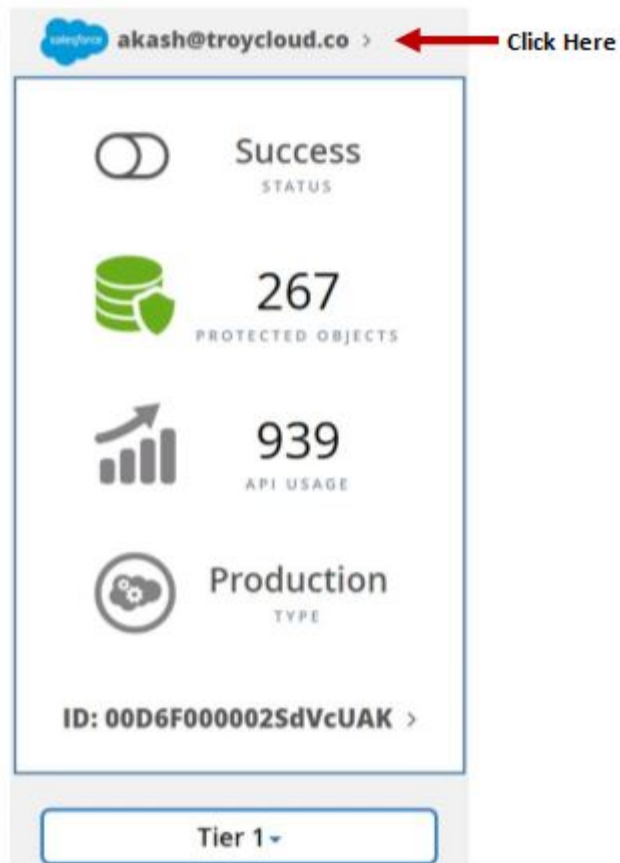


SERVICES

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**.

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