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The Ultimate Handbook for Protecting Your Salesforce Data with Veeam – Pt. 1

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Agenda

- Brief history of Veeam + Salesforce
- Why do I need to protect Salesforce
- Veeam Backup *for Salesforce*
- Installation + initial configuration
- Let’s talk about backup
- Let’s talk about restore
- Advanced configuration
- Advanced scenarios
- Conclusion

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Veeam + Salesforce

Veeam + Salesforce = ?

Organization since 2009.

5k users.

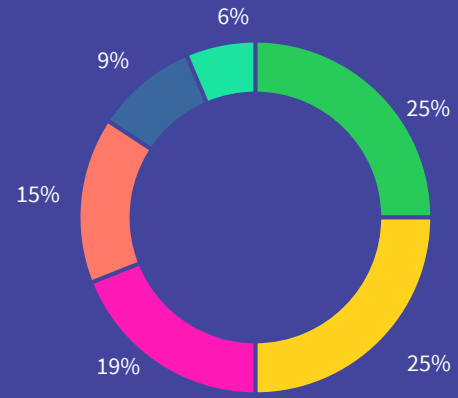
450k customers.

Dedicated SF team.

Salesforce protection trends 2022

To better understand the strategies, methods and personas involved in protecting Salesforce data, an independent research firm, surveyed 800 unbiased IT implementers in the spring of 2022:

400 Salesforce admins & developers
200 backup administrators
200 IT operations



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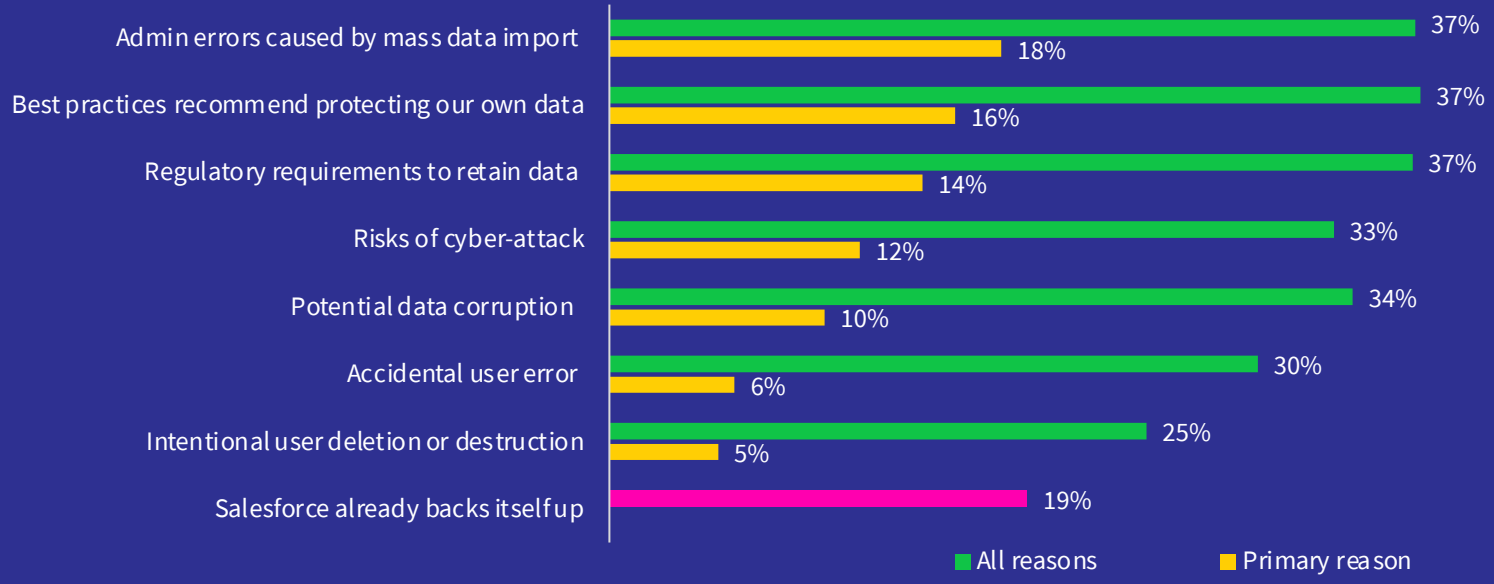
Why back up Salesforce?

Why back up Salesforce?

Why does/would your organization protect or back up Salesforce data?
What is your primary reason? (n=800)



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Mistakes, errors…

Human error (admin)

Even with deep Salesforce expertise, it's all too easy — and tempting — to upload or change data on the fly while in production.

Example: A Salesforce admin uses Data Loader to upload a large amount of data, but accidentally maps a list of fields incorrectly, which overwrites all existing data.

Human error (user)

Even users with regular permissions can cause major data loss incidents and not everything can be restored from the recycle bin.

Example: A customer support representative in the call center deletes or alters data that was used in a report, which then feeds into an important team dashboard and now the dashboard is reporting on incorrect data.

Mistakes, errors… #2

Integration error

Salesforce has hundreds of plug-ins and integration options that alter or move data, many of which are consistently rolling out updates. As a result, data loss or corruption to data or metadata is common. It's often the smallest data corruptions that are the hardest to identify.

Example: Integrating third-party applications like HubSpot can cause issues if all the properties, including contacts and leads, are not mapped correctly.

Data corruption (accidental)

Salesforce administrators can move large volumes of data or consolidate data quite easily, but this means that mistakes are just as easy to make. Accidental data overwriting or deleting during these processes are very common.

Example: An administrator mass-transfers opportunities based on new territory splits, and as a result, named accounts are removed from the account executives that need them.

Salesforce data protection: perception vs. reality?

Perception

It's in the cloud, everything is protected.

Salesforce


CRM Application


SaaS Infrastructure


Salesforce Data and Metadata

Reality

Salesforce is responsible for the uptime of the application and cloud infrastructure.

You are responsible for your data.
You need a backup!

Salesforce


CRM Application


SaaS Infrastructure

The customer


Salesforce Data and Metadata

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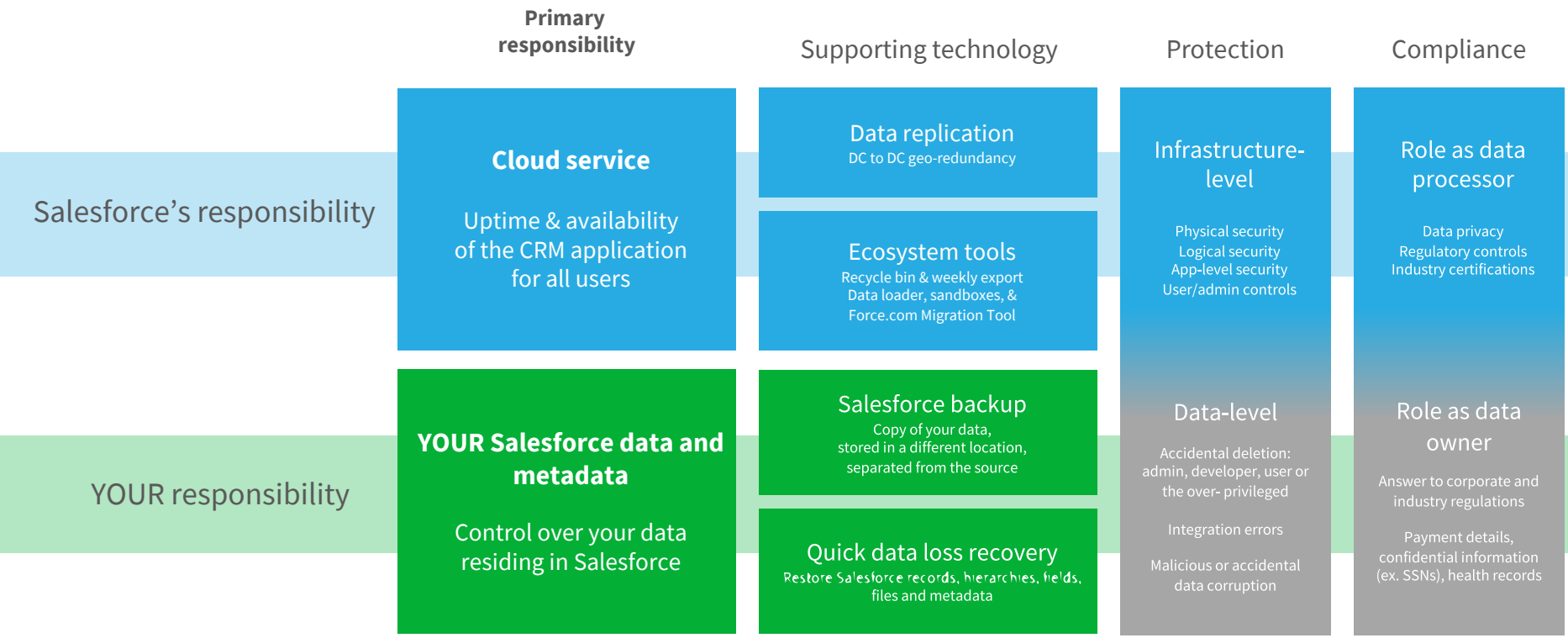
Salesforce Shared Responsibility Model



Best practices to back up Salesforce data

Published date: July 20, 2022 | https://help.salesforce.com/s/articleView?id=000386692&type=1

Description

It is important for Salesforce customers to develop a routine data backup strategy as part of their overall data management and security model.

Resolution

Even with the best of intentions, users and administrators have been in situations where they have either deleted large amounts of data, or have modified records, only to later realize that a mistake was made.

Third-party offerings

There are a number of data backup solutions offered by our partners on our AppExchange.

You can search for these by visiting the **AppExchange** directly and searching for keyword **backup.**

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Veeam Backup *for Salesforce*

Veeam Backup *for Salesforce*

…eliminates the risk of losing your Salesforce data and metadata — so that your business is reliably protected.

Control and flexibility

Own your data, avoid backup and storage lock-in and deploy your backup environment anywhere you choose.

Salesforce-native backup and recovery

Purpose-built for Salesforce using native APIs. Restore Salesforce records, hierarchies, fields, files and metadata.

Quickly recover from data loss

Protect against human error, integration issues and other common Salesforce data loss scenarios.

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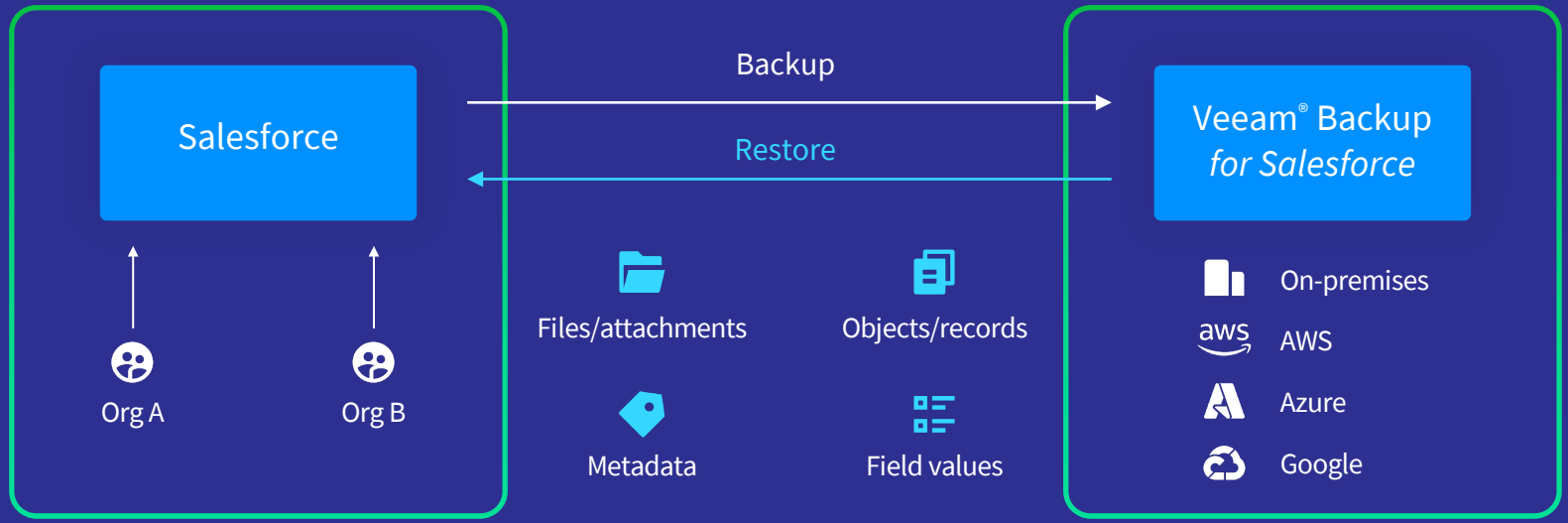
#1 Backup and Recovery

Veeam Backup *for Salesforce*

Your data. Your responsibility.



Deploy on-premises or cloud • Salesforce-native • Granular backup and recovery

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Requirements

Hardware (min): 4 vCPU, 6 GB RAM, enough space for file storage

OS: CentOS 7, RHEL 7/8, Oracle Linux 7/8

Engine: PostgreSQL 12-14 or PaaS* (ex. AWS Aurora PG)

Flash/SSD-based storage system (recommended)

On-premises + on-premises • Cloud + cloud • On-premises + cloud

Architecture overview 1

Backup server:

- Manages infrastructure components.
- Coordinates backup and recovery tasks.
- Controls backup policy scheduling.
- Generates daily reports and email notifications.

Backup server components:

- Backup server (vbsf-backup service) – coordinates data protection operations.
- Backup server (vbsf-restore service) – coordinates data recovery operations.
- Configuration database.
- Web UI (vbsf-ui-backend service) – provides the web interface.
- Updater service – check, view and install product and package updates.

Architecture overview 2

PostgreSQL Databases:

- Used to store data and metadata.
- Each organization is one database.
- Veeam Backup *for Salesforce* creates standard schemas to store organization data and metadata.

File Repositories:

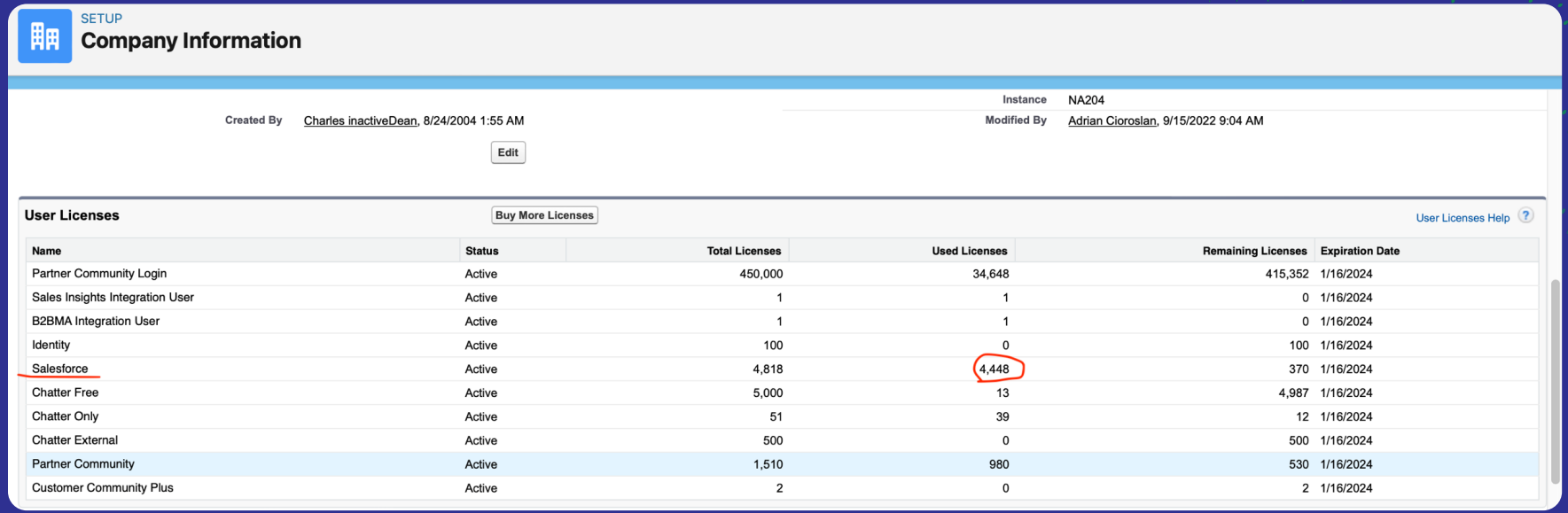
- /opt/vbsf/vbsf-backup/data.
- New repository per organization.
- The repository name contains the organization ID.
- Recommendation: mount additional storage to the specified directory.

Users/clouds/APIs

User

Q: How are you defining active users?

A: Users are calculated as “Salesforce user licenses" that are reported by the Salesforce. Only the total used SF user licenses are counted, and other Salesforce platform license types are ignored. Licenses are counted for production instances; all sandboxes are excluded.



SETUP
Company Information

Instance NA204
Created By Charles inactiveDean, 8/24/2004 1:55 AM
Modified By Adrian Cioroslan, 9/15/2022 9:04 AM

Edit

User Licenses Buy More Licenses User Licenses Help

Name	Status	Total Licenses	Used Licenses	Remaining Licenses	Expiration Date
Partner Community Login	Active	450,000	34,648	415,352	1/16/2024
Sales Insights Integration User	Active	1	1	0	1/16/2024
B2BMA Integration User	Active	1	1	0	1/16/2024
Identity	Active	100	0	100	1/16/2024
Salesforce	Active	4,818	4,448	370	1/16/2024
Chatter Free	Active	5,000	13	4,987	1/16/2024
Chatter Only	Active	51	39	12	1/16/2024
Chatter External	Active	500	0	500	1/16/2024
Partner Community	Active	1,510	980	530	1/16/2024
Customer Community Plus	Active	2	0	2	1/16/2024

Server sizing

Management server = CPU/memory should scale with the number of protected orgs. Can be balanced with schedules. 512MB RAM per job required

Data storage = PostgreSQL. Salesforce data.
1x1.6 + retention + growth estimate

File storage = disk space on management server.
1x1 + retention + growth estimate

Metadata storage = 20GB. Fast storage is important (SSD)

Ports

From	To	Protocol	Port	Notes
Web browser	Backup server	TCP	443	Required to access the Web UI component from a user workstation.
		SSH	22	Required to communicate with the backup service running on the backup appliance.
Backup server	PostgreSQL servers	TCP	5432	Required to communicate with servers hosting databases used to store backed-up data.
	Salesforce	TCP	443	Required to communicate with Salesforce entities.
	SMTP server	TCP	25	Default port used for sending email notifications.
	Veeam licensing server Vbsf.butler.veeam.com	TCP	443	Required to report and verify Veeam Backup *for Salesforce* license usage.
	Veeam updates repo Repository.veeam.com	TCP	443	Required to download information on available product updates.

Permissions

Account	Required permissions
Salesforce user	System administrator profile – grants broad permissions immediately, but not all required ones. Marketing user profile – required to restore campaigns and campaign membership. Permission set – view and edit converted leads. Permission set – make sure that user has permissions for all record types of the restorable data. Permission set license – any managed application license that is required for accessing the data (think HVS, CPQ). Sandboxes – any managed application needs to be enabled and license provided for the user. For example, high velocity sales requires application activation.

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Installation + initial configuration

Installation

1. **Install the RPM file.**
   (sudo yum install veeam-salesforce-0.0.1-xxx-e18.x86_64.rpm –y)
2. **Run the server configuration.**
   (sudo sh opt/vbsf/server-configuration.sh)
   1. Configure log retention settings.
   2. Choose PostgreSQL instance.
   3. Choose nginx settings.
3. **Do the initial configuration with the automatically generated URL.**

Initial configuration

1. Read and accept the license agreement.
2. Create the default administrator.
3. Connect to a PostgreSQL DB.
4. Provide a Veeam Backup *for Salesforce* license.
5. Create a SF connected app.
6. Connect to a SF organization.
7. Specify backup schedule settings.
8. Finish the wizard.

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Backup & restore options

Backup options

- One and only backup policy per organization.
- Custom schedule for objects.
- Ability to set API limits.
- Optional backup of files and attachments.
- Custom retention policies per objects/files.
- Ability to keep all object versions.

Restore options

- Four restore types: deleted records, values, files, metadata.
- Powerful search options and data filters.
- Object hierarchy recovery: unlimited child, up to three parent levels.
- Overwrite existing records and field customization.
- Work around user automation optically.


See you at Pt. 2
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