



# Getting started

## SaaS Backup For Salesforce

NetApp  
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# Table of Contents

- Getting started ..... 1
  - Getting started with a free trial ..... 1
  - Getting started with a paid subscription ..... 12

# Getting started

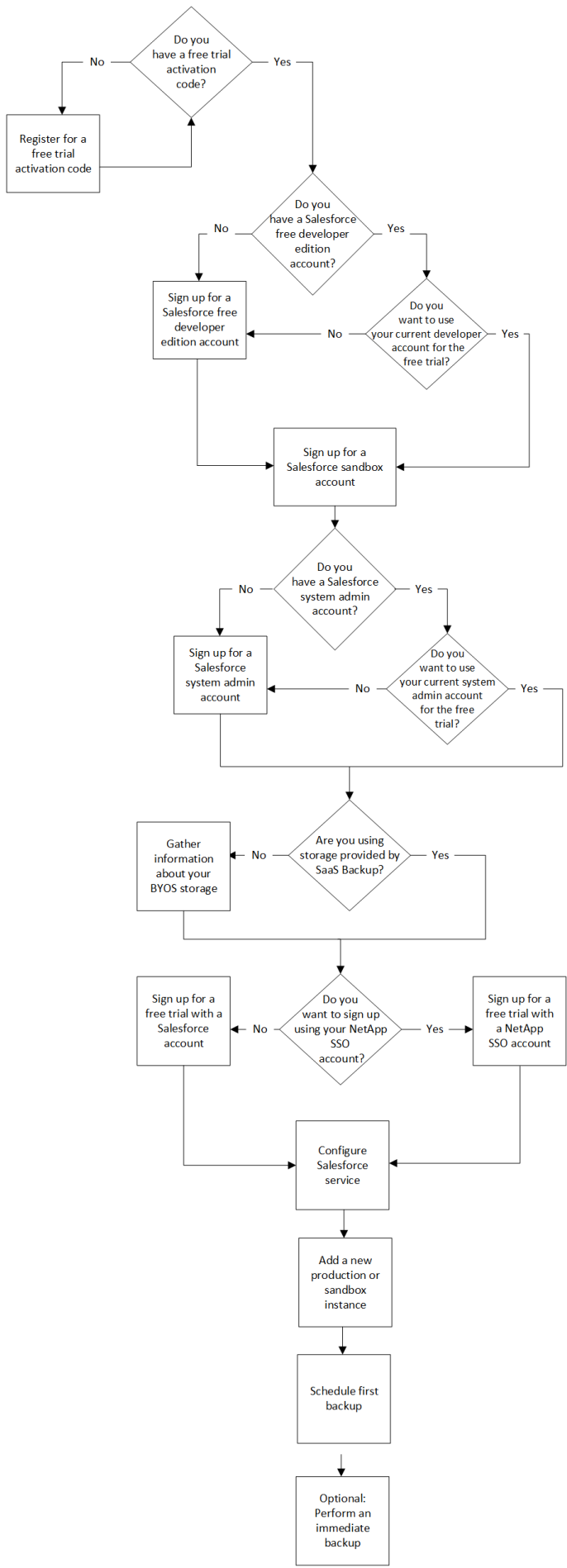
## Getting started with a free trial

### 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](#).



## 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.

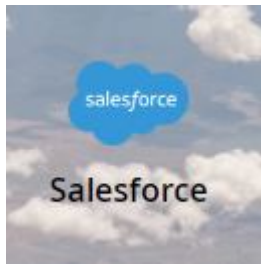
To complete sign-up process, you must have the activation code supplied when you purchased your SaaS Backup license or the activation code supplied when you signed up for a free-trial version.

### 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.

## 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?)

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

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.

## 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?)

Deny

Allow

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

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

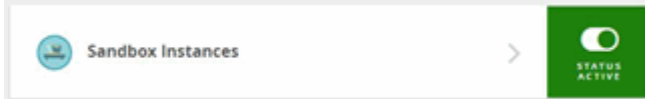
1. From the left-pane navigation, click **Services**.




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

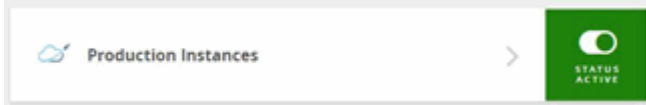
it to a different backup tier.

### Steps

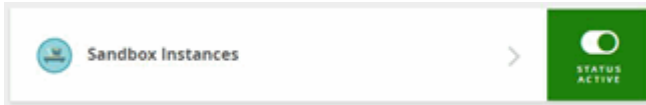
1. From the left-pane navigation, click **Services**.



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**.

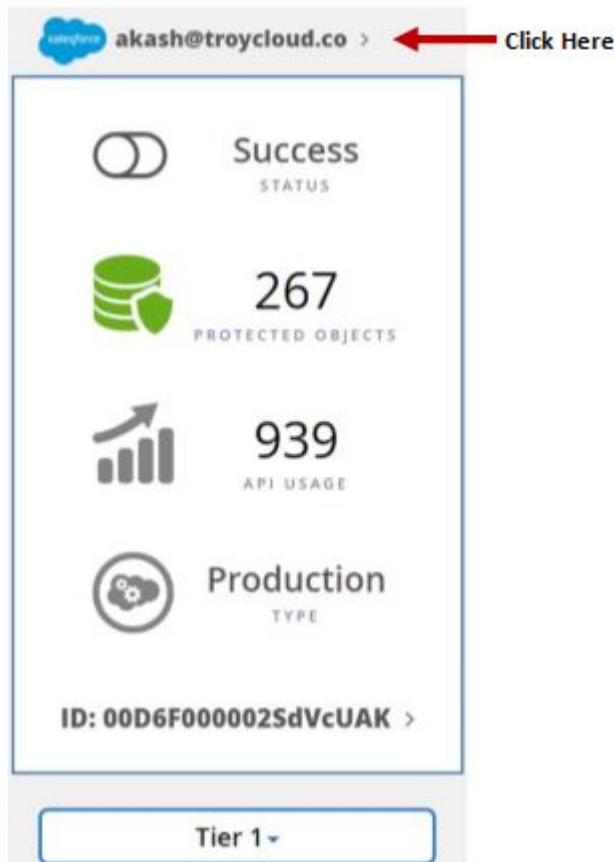


2. Click **Production Instances** or **Sandbox Instances**.





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.

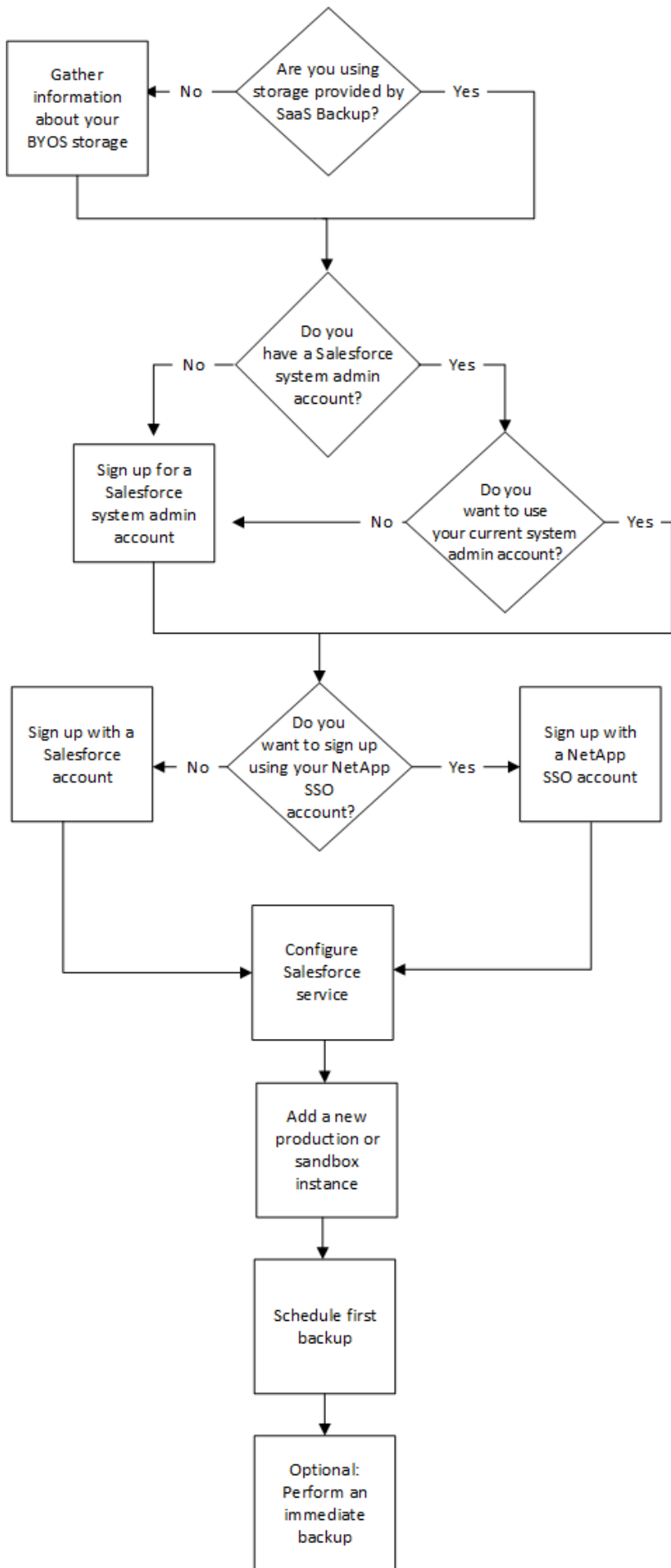
## Getting started with a paid subscription

### 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](#).



## 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.

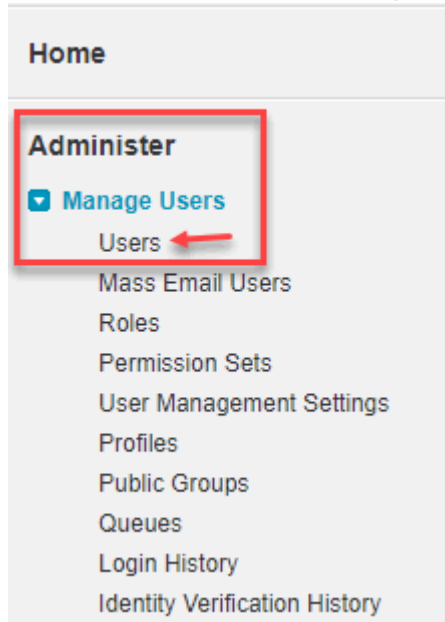
- Bucket name
- Region
- Access key
- Secret key

## 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:





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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

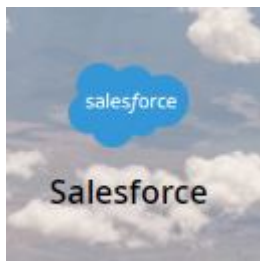
You can sign up for a paid subscription of SaaS Backup with Salesforce or with your NetApp SSO account.

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.

## Allow Access?

QA1 is asking to:

- Access your basic information
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- Access and manage your Chatter data
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- 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?)

Deny

Allow

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**.

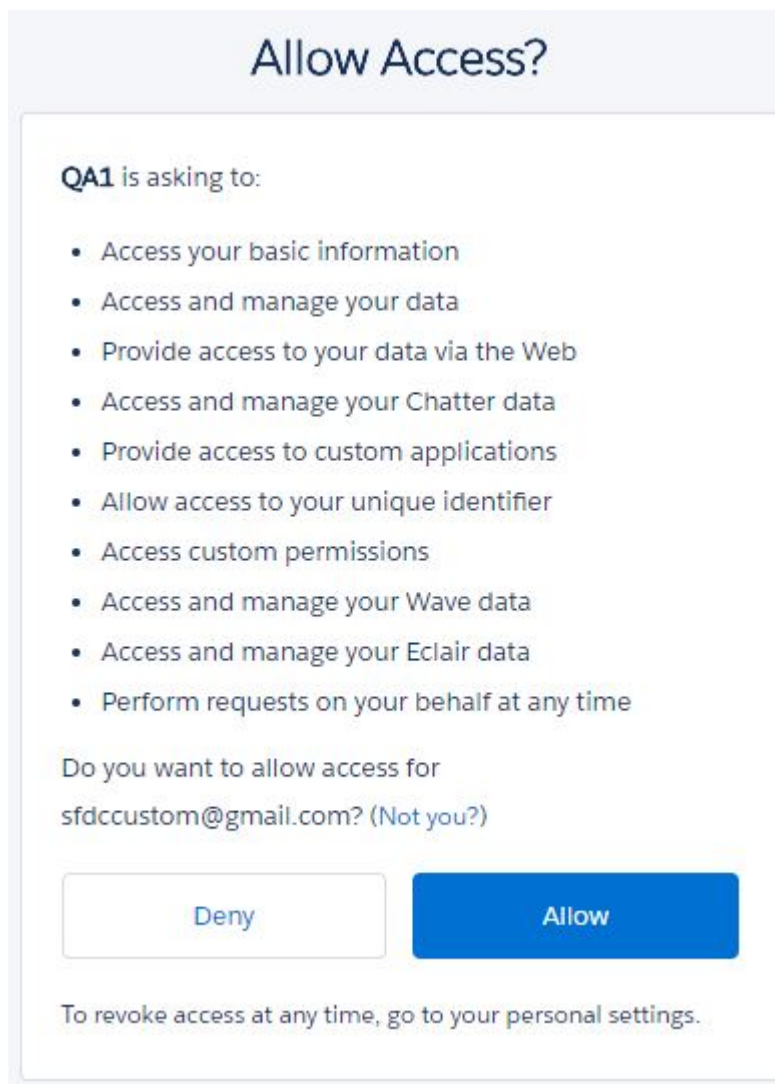
### Signing up for SaaS Backup with NetApp SSO

#### 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.



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**.



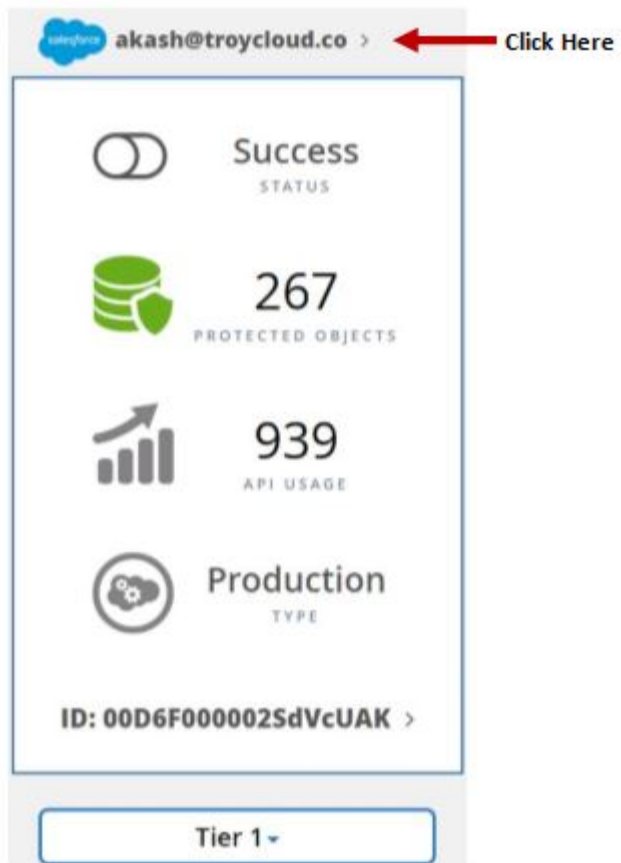
2. Click **Production Instances** or **Sandbox Instances**.



3. Select the correct instance you want to backup now.

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