



# **Getting started with a paid subscription**

## **SaaS Backup For Salesforce**

NetApp  
March 06, 2021

This PDF was generated from [https://docs.netapp.com/us-en/salesforce/concept\\_paid\\_subscription\\_workflow.html](https://docs.netapp.com/us-en/salesforce/concept_paid_subscription_workflow.html) on March 06, 2021. Always check docs.netapp.com for the latest.

# Table of Contents

- Getting started with a paid subscription . . . . . 1
  - Workflow for getting started with a paid subscription of SaaS Backup for Salesforce . . . . . 1
  - Information to gather about your Bring Your Own Storage (BYOS) option . . . . . 3
  - Creating a Salesforce system administrator account . . . . . 3
  - Signing up for a paid subscription of SaaS Backup for Salesforce . . . . . 4
  - Performing an immediate backup . . . . . 7

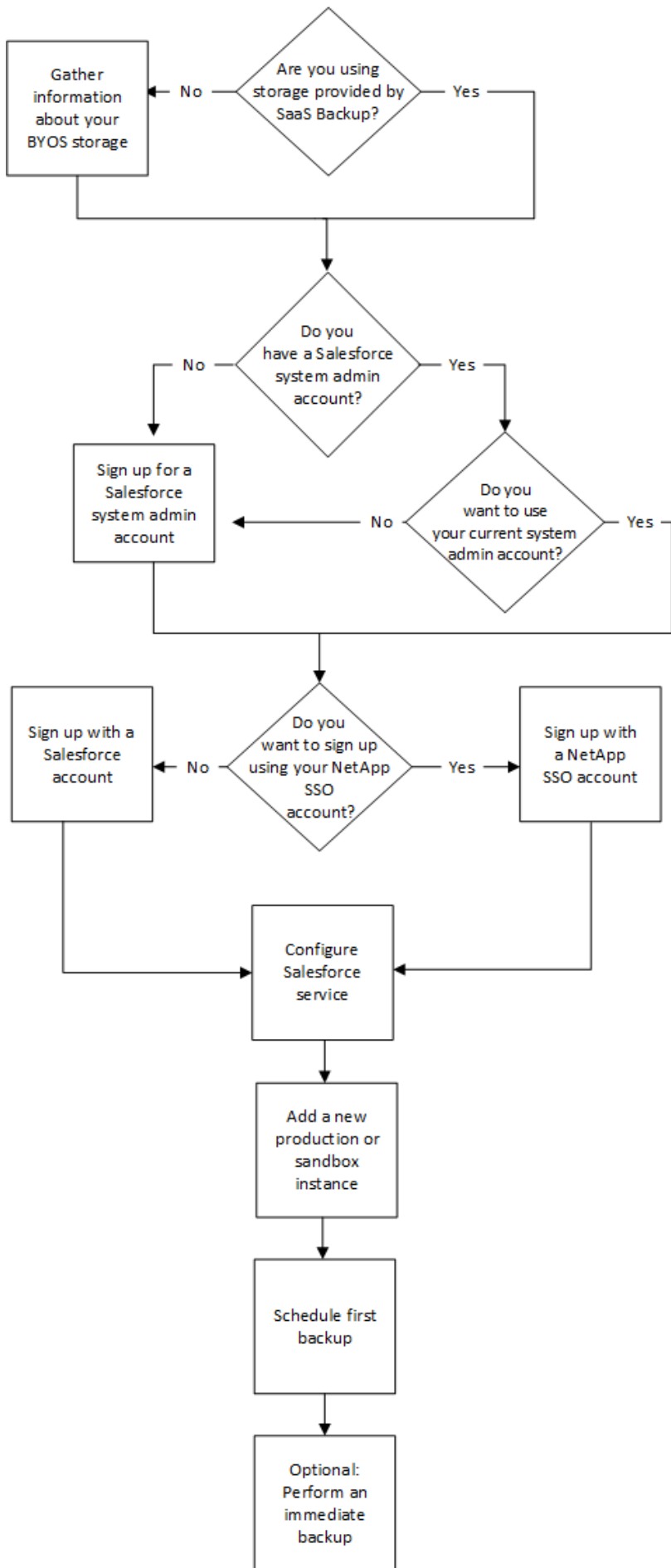
# Getting started with a paid subscription

## 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.

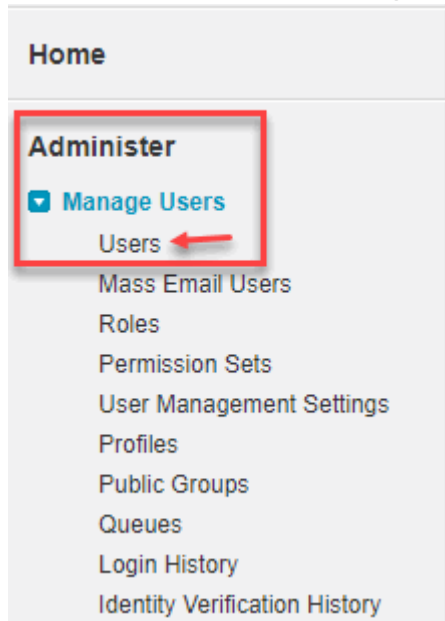
- Bucket name
- Region
- Access key
- Secret key

## 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.

## 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.

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**.

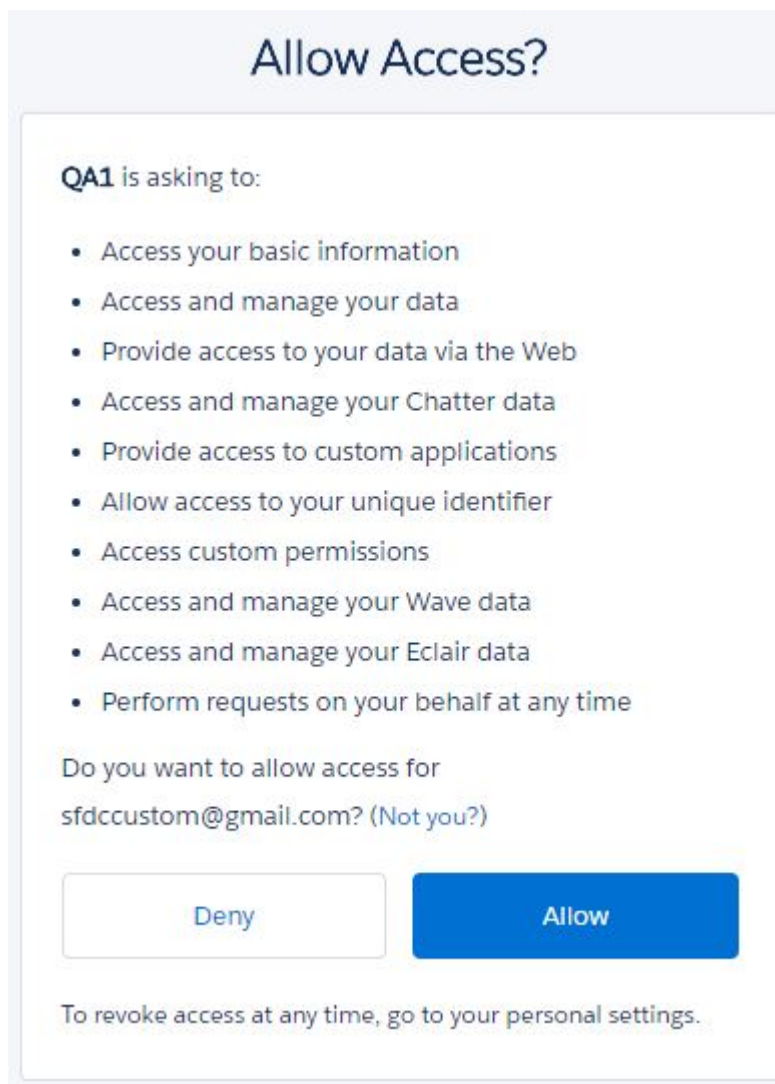
## Signing up for SaaS Backup with NetApp SSO

### 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.



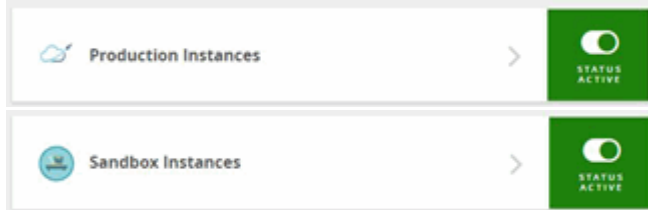
For the trial version of SaaS Backup for Salesforce, you can only perform three immediate backups per day.

### Steps

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



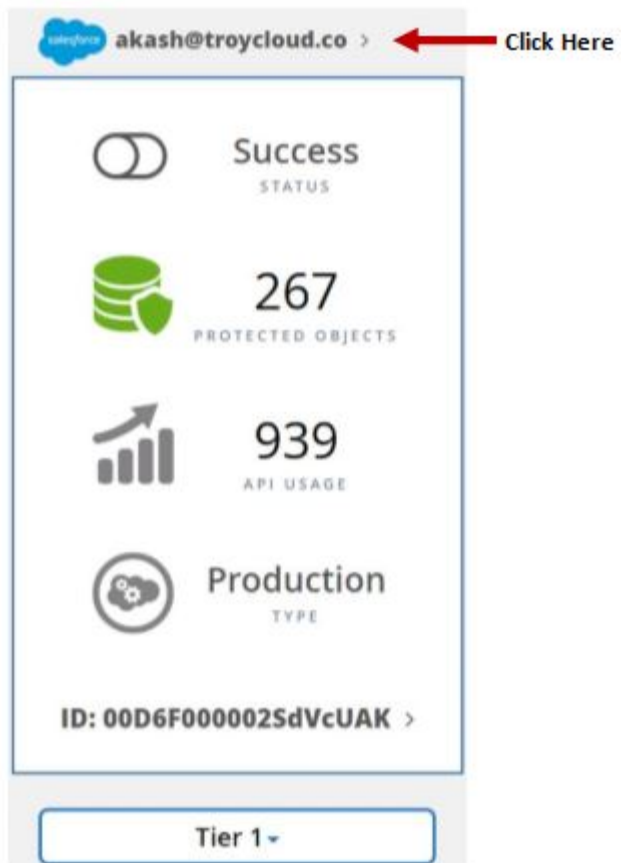
2. Click **Production Instances** or **Sandbox Instances**.



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**.

## Copyright Information

Copyright © 2021 NetApp, Inc. All rights reserved. Printed in the U.S. No part of this document covered by copyright may be reproduced in any form or by any means-graphic, electronic, or mechanical, including photocopying, recording, taping, or storage in an electronic retrieval system-without prior written permission of the copyright owner.

Software derived from copyrighted NetApp material is subject to the following license and disclaimer:

THIS SOFTWARE IS PROVIDED BY NETAPP "AS IS" AND WITHOUT ANY EXPRESS OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE, WHICH ARE HEREBY DISCLAIMED. IN NO EVENT SHALL NETAPP BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

NetApp reserves the right to change any products described herein at any time, and without notice. NetApp assumes no responsibility or liability arising from the use of products described herein, except as expressly agreed to in writing by NetApp. The use or purchase of this product does not convey a license under any patent rights, trademark rights, or any other intellectual property rights of NetApp.

The product described in this manual may be protected by one or more U.S. patents, foreign patents, or pending applications.

RESTRICTED RIGHTS LEGEND: Use, duplication, or disclosure by the government is subject to restrictions as set forth in subparagraph (c)(1)(ii) of the Rights in Technical Data and Computer Software clause at DFARS 252.277-7103 (October 1988) and FAR 52-227-19 (June 1987).

## Trademark Information

NETAPP, the NETAPP logo, and the marks listed at <http://www.netapp.com/TM> are trademarks of NetApp, Inc. Other company and product names may be trademarks of their respective owners.