



Managing SaaS Backup for Salesforce

SaaS Backup For Salesforce

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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 policies to which items have been assigned for backup. Backup policies 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**.

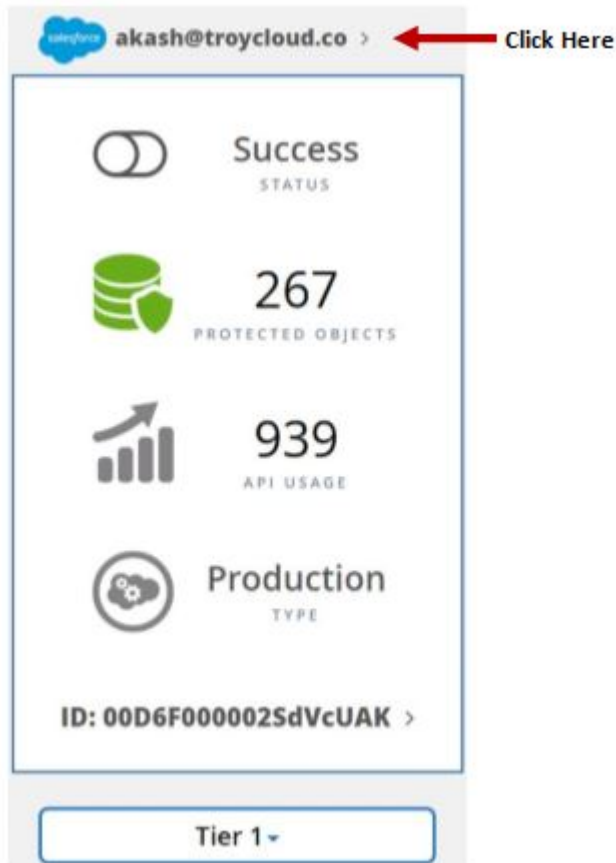


2. Click **Production Instances** or **Sandbox Instances**.



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

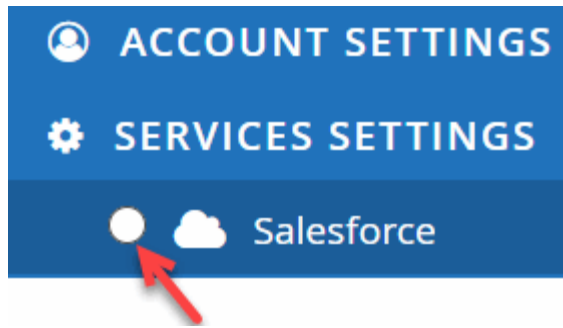
You can enable or disable metadata backups for Salesforce.

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**.



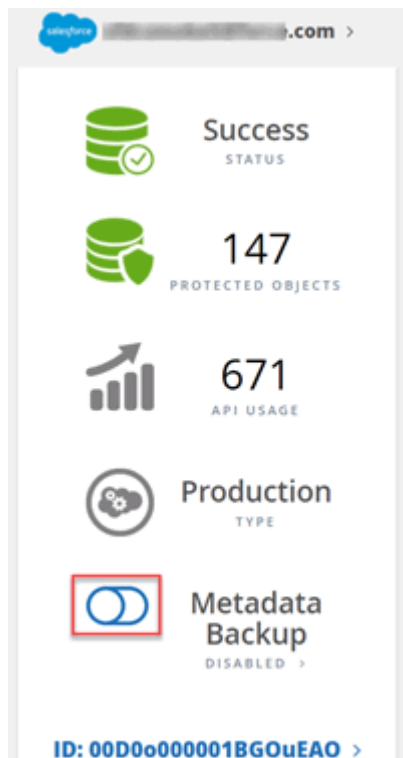
2. Click **Enable Metadata Backup** to turn the feature on.
After enabled at the tenant level, metadata for all the organizations will be backed up.

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.

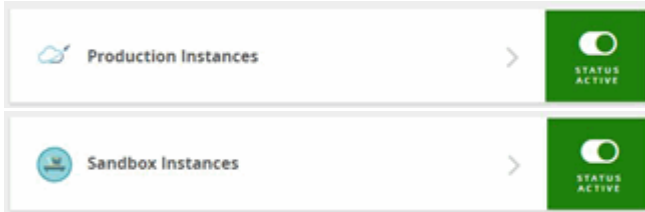
Restoring the most recent backup

Steps

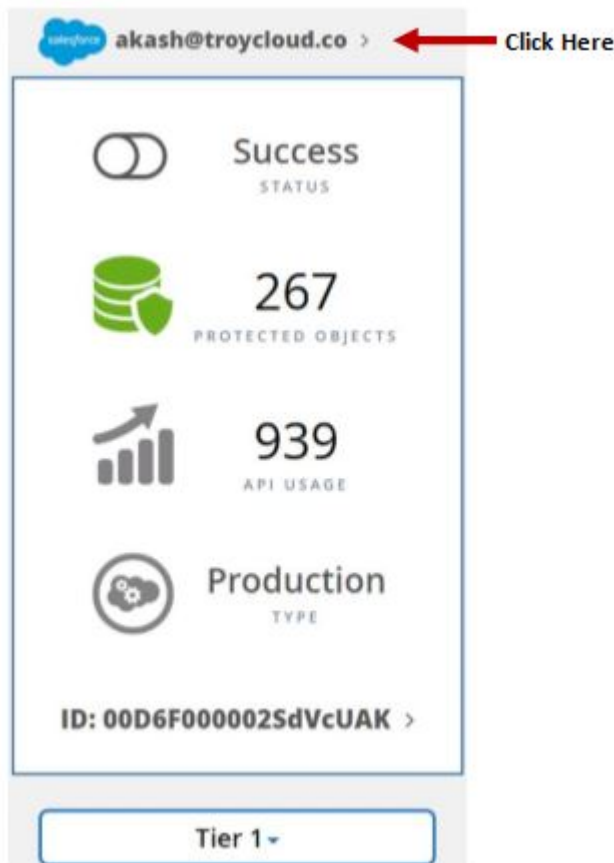
1. From the left-pane navigation, click **Services**.



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	

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



- Select restore options.
 - 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.
 - 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.
 - 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.

- Click **Submit**.



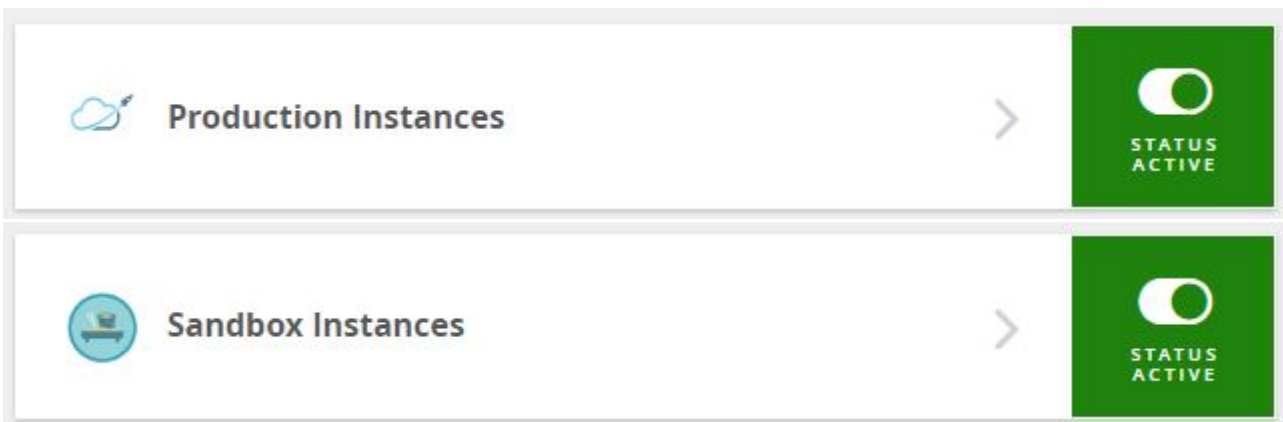
Restoring from a previous backup

Steps

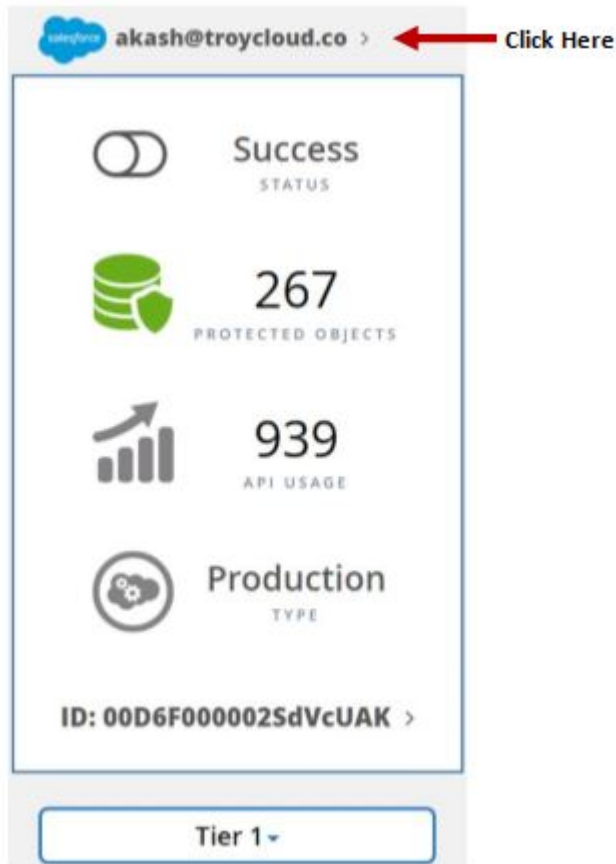
- From the left-pane navigation, click **Services**.



- 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.

Show Selected Backups ▾

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**.

 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

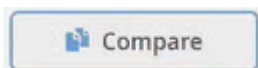
1. From the left-pane navigation, click **Jobs**.



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.

OBJECT ID	OBJECT NAME	API USAGE	BACKUP CHANGES	TYPE	ACTION	BACKUP STATUS
ObjectTest_c	ATestObject	4	0	Custom		

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**.

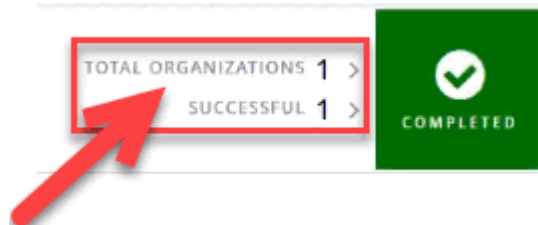


If there are no differences between the two selected backups, the compare job is not created.

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.


compare Job: All Organizations Total: 1 ✕
 Job Id: 7e4eaab4-5329-f1ea-4a27-ef5e0f321618

#	Object Name	Status	% Completion	Created	Updated	Deleted	Message
1	Account	Successful	100	0	0	2	Compare job completed

[Close](#)

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 

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.

Purged List
✕


ITEM NAME	SERVICE TYPE	DAYS LEFT	PURGED DATE	STATUS
<input type="text" value="Filter By Email / URL"/>	<div style="border: 1px solid #0070C0; padding: 2px; display: inline-block;">All</div>			<div style="border: 1px solid #0070C0; padding: 2px; display: inline-block;">All</div>
00D0o000001BGOuEAO	Salesforce	7 days	October 21, 2020, 05:27:22 PM	To be Purged

Cancel


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**.

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