

# Veeam Backup for Salesforce

Version 2.0

User Guide

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# Contacting Veeam Software

At Veeam Software we value feedback from our customers. It is important not only to help you quickly with your technical issues, but it is our mission to listen to your input and build products that incorporate your suggestions.

## Customer Support

Should you have a technical concern, suggestion or question, visit the Veeam Customer Support Portal to open a case, search our knowledge base, reference documentation, manage your license or obtain the latest product release.

#### **Company Contacts**

For the most up-to-date information about company contacts and office locations, visit the Veeam Contacts Webpage.

## **Online Support**

If you have any questions about Veeam products, you can use the following resources:

- Full documentation set: veeam.com/documentation-guides-datasheets.html
- Veeam R&D Forums: forums.veeam.com

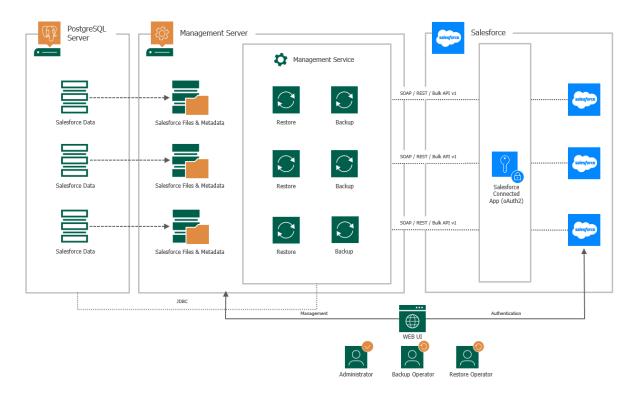
# Overview

Veeam Backup for Salesforce is a solution developed for data and metadata protection for Salesforce CRM. With Veeam Backup for Salesforce, you can do the following:

- Run your backup environment anywhere: on-premises, in AWS, Microsoft Azure and so on.
- Manage backup and restore operations for multiple Salesforce organizations.
- Back up Salesforce files, data and metadata.
- Back up Salesforce files as often as every 5 minutes.
- Restore files, data and metadata including object hierarchies and custom fields.
- Configure granular backup schedules and retention settings at the object level.
- Compare different versions of Salesforce records and metadata.
- Create real-time alerts for backup, recovery, licensing and connection issues.
- Control access to the product functionality with the help of user roles and scopes.
- Use Azure Active Directory (AD) or Salesforce as a single sign-on (SSO) provider to log in the product Web UI.

# Solution Architecture

This section provides information on the Veeam Backup for Salesforce architecture and its components.



#### Management Server

The management server is a Linux-based machine where Veeam Backup for Salesforce is installed. The management server performs the following administrative activities:

- Manages infrastructure components.
- Coordinates backup and restore jobs.
- Controls backup policy execution.
- Generates alert notifications that can be sent by email and to specific Slack channels and chats.

#### Management Server Components

The management server uses the following components:

- Management server (vbsf-backend) manages backup and restore services. It also provides a web interface (Web UI) that allows a user to access the Veeam Backup for Salesforce functionality.
- Backup service (vbsf-backup) performs data retrieval from Salesforce.
- **Restore service** (vbsf-restore) performs data upload to Salesforce.
- **Configuration database** stores application configuration, connection details to Salesforce organizations, backup policies, restore jobs, sessions and so on. This database is created during initial configuration of Veeam Backup for Salesforce.

• Veeam Updater (veeam-updater) – allows Veeam Backup for Salesforce to check, view and install product and package updates.

#### PostgreSQL Server

To store data and backups of protected Salesforce organizations, Veeam Backup for Salesforce uses PostgreSQL databases. Each protected organization must have a dedicated database. Veeam Backup for Salesforce creates at least 2 database schemas and saves organization data and metadata to the database specified in the backup policy settings. For more information on databases, see Managing Databases.

One additional database — configuration database — is required to store Veeam Backup for Salesforce configuration. It is possible to combine application configuration schema and Salesforce backup schemas in one database, although it is not recommended for portability reasons.

Since the PostgreSQL server is not a part of the Veeam installation package, you must install and configure it separately. For more information, see System Requirements.

#### File Repositories

To store backups of Salesforce files and metadata, Veeam Backup for Salesforce creates a file repository per each protected Salesforce organization on the management server in the following folder: /opt/vbsf/data. The name of each file repository contains the path to the folder and organization ID. It is recommended that you create a dedicated partition for the file storage and mount it to the specified directory to prevent any disk capacity issues on the management server. For more information on the required disk capacity, see System Requirements.

#### Log Repository

By default, Veeam Backup for Salesforce stores its logs in the following folder: /var/logs/vbsf/. It is recommended that you create a dedicated partition for the log repository and mount it to the specified directory to prevent any disk capacity issues on the management server. For more information on the required disk capacity, see System Requirements.

#### Salesforce Organizations

To protect a Salesforce organization, Veeam Backup for Salesforce uses the native Salesforce API. To allow integration between the product and Salesforce, the Administrator of the protected organization (a Standard User with specific permissions) creates a Connected App and uses the Administrator account to authorize access to Salesforce data.

To enable access to the product functionality with the help of user roles and scopes, the Administrator configures single sign-on (SSO) authentication with a Microsoft Azure or Salesforce identity provider and adds new users to the product.

# Planning and Preparation

Before you start installing Veeam Backup for Salesforce, check system requirements for the product components, network ports used for data transmission, required permissions and other prerequisites. For more information on the product components, see Solution Architecture.

## In This Section

- System Requirements
- Ports
- Required Permissions
- Considerations and Limitations
- Sizing and Scalability Guidelines

# System Requirements

The machine where Veeam Backup for Salesforce will be deployed, the machines running PostgreSQL servers used to host databases, and the file shares used to store backed-up data must meet the necessary hardware and software requirements.

#### Management Server

Specification	Requirement
Hardware	<ul> <li>CPU: 4 cores (minimum)</li> <li>Memory: 4 GB RAM (minimum). If you plan to protect multiple Salesforce organizations, it is recommended that you add 4 GB for the management server and 1 GB per each protected organization.</li> <li>Free space: 100 GB (minimum), excluding file and log storage space. For file storage space requirements, see File Storage. For log storage space requirements, see Log Storage.</li> <li>Network bandwidth: 10 Mbps (minimum)</li> <li>Note: To improve performance of the management server, it is recommended that you use SSDs for databases and file storage.</li> </ul>
OS	<ul> <li>CentOS 7 (centos-release-7-9.2009.1.el7.centos.x86_64 and later)</li> <li>RedHat Linux 7, 8</li> <li>Oracle Linux 7, 8</li> <li>AlmaLinux 8.8</li> <li>Rocky Linux 8.8</li> <li>Ubuntu 20.04 LTS, 22.04 LTS</li> </ul> Note: Starting from version 2.1, Veeam Backup for Salesforce can be installed on a machine running the AlmaLinux 8.8 or Rocky Linux 8.8 operating system. However, this support is experimental. For more information, see this Veeam KB article.

## PostgreSQL Servers

Specification	Requirement
Hardware	<ul> <li>CPU: 4 cores (minimum)</li> <li>Memory: 16 GB RAM if the largest object in your Salesforce organization contains no more than 2M records; 32 GB RAM and more if you have objects that contain more than 2OM records.</li> <li>Free space: The initial backup of Salesforce data requires at least x1.6 more disk space in PostgreSQL since the product stores both the latest and history records. You can calculate the required disk space as described in section Sizing and Scalability Guidelines.</li> <li>To learn how to monitor your data storage and used file space in the Salesforce database, see Salesforce Documentation.</li> <li>Note: To improve performance of PostgreSQL servers, it is recommended that you use SSDs on the machines running the servers.</li> </ul>
Software	PostgreSQL 12, 13, 14 (recommended), 15 Note: PostgreSQL 15 is experimentally supported in Veeam Backup for Salesforce version 2.1 and later. For more information on experimental support, see this Veeam KB article.

## File Storage

Specification	Requirement
Hardware	Veeam Backup for Salesforce stores file data and metadata in the /opt/vbsf/data folder on the management server. It is recommended that you create a dedicated partition for the file storage and mount it to the specified directory. Consider that network file shares are not supported. Make sure that you provide your file storage with enough space taking into account the total size of the files used in the Salesforce database and your daily change rate. To view the amount of space used by your files, open the Salesforce UI, navigate to <b>Setup &gt; Company Information</b> and check the <b>Used File Space</b> field. <b>Note:</b> To improve performance of the management server, it is recommended that you use SSDs for the file storage.

## Log Storage

Specification	Requirement
Hardware	Veeam Backup for Salesforce stores its logs in the /var/logs/vbsf/ folder on the management server. It is recommended that you create a dedicated partition for log storage with a minimum of 50 GB of disk capacity and mount it to the specified directory. For more information, see Sizing and Scalability Guidelines.

## Salesforce

Specification	Requirement
Salesforce API	By default, Veeam Backup for Salesforce 2.0 uses Salesforce API version 57.0. Any objects available in later API versions will not be discovered and protected by the product.
	<b>Note</b> : You can change the API version used by the product as described in section Configuring Advanced Settings.

## Ports

The following network ports must be open to ensure proper communication of components in the Veeam Backup for Salesforce infrastructure.

From	То	Protocol	Port	Notes
Web browser (local machine)	Management server	TCP/HTTPS	443	Required to access the Web UI component from a user workstation.
		SSH	22	Required to communicate with the backup service running on the management server.
	Salesforce	TCP/HTTPS	443	Required to communicate with Salesforce entities.
Microsoft Az	Microsoft Azure	TCP/HTTPS	443	Required to communicate with Microsoft Azure entities.
Management server	PostgreSQL servers	ТСР	5432	Required to communicate with servers hosting databases used to store backed-up data.
	Salesforce SMTP server	TCP/HTTPS	443	Required to communicate with Salesforce entities.
		ТСР	25	Default port used for sending email notifications.
	Veeam License Server (vbsf.butler.veeam.com)	TCP/HTTPS	443	Required to activate licenses, to verify license updates and metering.
	Veeam Update Notification Server (repository.veeam.com)	TCP/HTTPS	443	Required to verify availability of product updates, notify users on these updates and install the updates on the management server.

## Permissions

To perform backup and restore operations, Veeam Backup for Salesforce requires the following permissions to be provided.

## Salesforce API Integration

Account	Required Permissions		
Salesforce User	Veeam Backup for Salesforce requires a Standard User with the <i>Salesforce</i> license type to connect to a Salesforce organization to perform backup and restore operations for Salesforce resources. Note that free Salesforce Integration Users cannot perform backup and restore operations.		
	The user whose credentials are used to authorize the connection must be assigned full permissions required to read and modify data:		
	• System Administrator profile (grants broad permissions immediately, but not all the required ones).		
	<ul> <li>Permission set that has the following permissions enabled:</li> <li>Query All Files permission to back up all files.</li> </ul>		
	<ul> <li>View and Edit Converted Leads permission to restore</li> </ul>		
	<ul> <li>converted leads.</li> <li>Permissions for all custom record types of objects to restore</li> </ul>		
	records of custom types.		
	<ul> <li>Set Audit Fields upon Record Creation permission to restore original values in audit fields when restoring deleted records.</li> </ul>		
	<ul> <li>Update Records with Inactive Owners permission to restore</li> </ul>		
	<ul> <li>deleted records owned by inactive users.</li> <li>Update Email Messages permission to restore attachments of email messages.</li> </ul>		
	• Permission set licenses for any managed application license that is required for accessing the data (for example, HVS, CPQ).		
	• Feature-based user permissions: Marketing User, Service Cloud User, Knowledge User, Salesforce CRM Content User.		
	For sandboxes, any managed application needs to be enabled and license provided to the user. For example, <b>High Velocity Sales</b> requires application activation.		

Account	Required Permissions
Salesforce Connected App	Secure and encrypted connection to Salesforce is established using the Connected App tokens. The Connected App must be assigned the following OAuth scopes:
	<ul> <li>Full access (full)</li> <li>Perform requests at any time (refresh_token, offline_access)</li> <li>Access unique user identifiers (openid)</li> </ul>
	The latter option applies only if you use Salesforce as an identity provider.
	For more information on OAuth scopes in Salesforce, see Salesforce Documentation. To learn how to create the app, see this Veeam KB article.

## Veeam Backup for Salesforce Components

Account	Required Permissions
PostgreSQL Database User	Veeam Backup for Salesforce creates databases and database schemas to store Salesforce data and metadata. Therefore, the database user must be granted permissions to create schemas and databases. <b>Note</b> : If you do not grant the user permissions to create databases, you will have to manually create databases on PostgreSQL servers first, and then add databases to Veeam Backup for Salesforce as described in section Adding Databases, before you create any backup policies.

# **Considerations and Limitations**

When you plan your deployment of Veeam Backup for Salesforce, keep in mind the following limitations and considerations.

## Supported Salesforce Offerings

 Salesforce provides multiple offerings that are built on one Salesforce Platform — Sales Cloud, Service Cloud, Financial Cloud, Health Cloud and Education. Veeam Backup for Salesforce 2.0 supports backup of all data and objects available on the Salesforce Platform if these resources can be retrieved using the Salesforce API version 57 and earlier. This means that if an object or data cannot be obtained using standard Salesforce API requests, backup of these objects is not supported.

Salesforce Marketing Cloud is built on another platform and is not protected by the product.

- Both Salesforce Classic and Lightning Experience interfaces are supported.
- Salesforce sandbox organizations as well as Salesforce production organizations can be protected by Veeam Backup for Salesforce.
- All Salesforce API-enabled editions are supported: Developer, Enterprise, Performance, Professional (API access must be enabled), Unlimited.

#### Backup and Restore

- Backup and restore of personal reports and dashboards is not supported since Salesforce does not provide API to export and restore this type of data.
- Backup of encrypted field types is not supported.
- Backup of *KnowledgeArticle* types of objects is not supported.
- Backup of *BigObject* types of objects is not supported.
- Backup of Salesforce objects listed in Appendix A. Unsupported Objects is not supported.
- Backup of certain metadata types is unsupported due to Salesforce limitations. For more information, see Salesforce Documentation.
- Restore of the *MobileApplicationDetail* and *MailmergeTemplate* types of content is not supported.
- Restore of embedded images in rich text area fields is not supported in Veeam Backup for Salesforce, except for images that are stored as content versions in *FeedAttachment* objects.

#### Time Zone

The product Web UI uses the time zone of a machine from which you access Veeam Backup for Salesforce. However, the management server and databases use the UTC time zone for all operations.

#### Salesforce User

- Set the English language in the locale and account language settings for the user in Salesforce. It is required for error handler to work properly.
- Make sure that you have assigned the user all the required permissions.

# Sizing and Scalability Guidelines

This section is intended for professionals who search for a best practice answer to sizing-related issues, and assumes you have already read the whole Veeam Backup for Salesforce User Guide.

Be aware that a best practice is not the only answer available. It will fit in the majority of cases but can also be totally wrong under different circumstances. Make sure you understand the implications of the recommended practices, or request assistance. If in doubt, reach out to Veeam professionals on Veeam R&D Forums.

## PostgreSQL

To provide stable operation of a PostgreSQL server, make sure that you have enough disk space and compute resources allocated to the server and the following recommended settings configured.

#### General Recommendations

- It is highly recommended that you install PostgreSQL on a dedicated server.
- It is recommended that you back up PostgreSQL databases on a regular basis. You can use Veeam Backup & Replication for this purpose.

#### **Disk Size Calculation**

When calculating the disk space required for the PostgreSQL server, take into account your desired data set, daily change rate and the retention policy settings. The initial backup of Salesforce data requires at least x1.6 more disk space in PostgreSQL since the product creates both the latest and history records. All further backups are incremental and consume the same amount of disk space as original records occupy in Salesforce.

You can use the following formula to calculate the required disk space: (*Salesforce Used Data Space \* 1.6*) + (*Size of Added Data \* Planned Period of Data Backup*) + (*Size of Changed Data \* Number of Backups Within Your Retention Period*).

#### TIP

To check the amount of space currently occupied by your data in the Salesforce database, open the Salesforce UI and navigate to **Setup > Company Information**.

Consider the following example:

- Salesforce Used Data Space your Salesforce database initially stores 200 GB of data.
- *Size of Added Data* 10,000 records of 2 KB each are added to the Salesforce database daily (that is, *10,000 \* 2 KB / 1024 = 0.02 GB*).
- *Planned Period of Data Backup* data is planned to be backed up daily for a period of 5 years (that is, *5* \*365 days = 1825 days).
- *Size of Changed Data* 10,000 records of 2 KB each are changed in the Salesforce each backup cycle (that is, *10,000 \* 2 KB / 1024 = 0.02 GB*).
- *Number of Backups Within Your Retention Period* backup is performed every hour (that is, 24 backups per day) while the retention period is set to 180 days.

In this case, the amount of the disk space required for the PostgreSQL server will be calculated as follows: (200 GB \* 1.6) + (0.02 GB \* 1825) + (0.02 GB \* 24 \* 180) = 320 GB + 36.5 GB + 86.4 GB = 443 GB.

## PostgreSQL Configuration Settings

Consider adjusting the default settings in the <code>postgresql.conf</code> configuration file as follows:

Parameter	Value
max_connections	300 or more*
superuser_reserved_connections	7
shared_buffers	20% of RAM
random_page_cost	1.1
work_mem	15% of RAM
maintenance_work_mem	128 MB
max_wal_size	3 GB
min_wal_size	2 GB
checkpoint_completion_target	0.9
effective_io_concurrency	200
effective_cache_size	60% of RAM

\*Veeam Backup for Salesforce requires about 20 connections to one PostgreSQL database for management operations, about 50 connections per one backup policy and 10 connections per one custom backup schedule. To avoid performance issues, it is recommended that you set the maximum allowed number of connections to 300 in the PostgeSQL database configuration. You may need to adjust this number later based on the number of created backup policies and schedules.

## Log Storage

Logs can consume significant amount of disk space. The total log size depends on the log retention policy and daily change rate in your organizations. If the management server runs out of space, Veeam Backup for Salesforce will fail to run. To provide stable operation of the product, consider the following:

- Before you deploy Veeam Backup for Salesforce, create a dedicated partition for log storage and allocate to it at least 10 % of the file and data space used in Salesforce. For example, if you have 200 GB of files and 300 GB of data in your Salesforce organization, you must allocate at least 50 GB to this partition. Then, you must mount the partition to the /var/logs/vbsf/folder.
- After you deploy Veeam Backup for Salesforce, specify for how long you want to retain the product logs. To do that, modify the logging.backup.file.retention, logging.restore.file.retention and logging.backend.file.retention parameter values as described in section Configuring Advanced Settings.

## File Storage

As Veeam Backup for Salesforce stores Salesforce file data and metadata in the same format as they are stored in Salesforce, files can consume significant amount of disk space. The total file size depends on the file retention policy and daily change rate in your organizations. To provide stable operation of the product, consider the following:

- Before you deploy Veeam Backup for Salesforce, create a dedicated partition for file storage and mount this partition to the /opt/vbsf/data/ folder.
- The product deletes backed-up files from its file repository according to the configured retention settings only. That means if you manually delete a file in Salesforce, it will not be automatically deleted from the repository.

# Licensing

A product license is required for Veeam Backup for Salesforce to run. Each product license can be used to protect one or multiple Salesforce organizations. Each product license can be used in one or multiple product installations.

Veeam Backup for Salesforce is licensed per User. A User is defined as a **Standard User** with the *Salesforce* license type reported by the Salesforce platform. Only Salesforce user licenses consumed by production organizations whose data is protected are counted.

The Veeam license is not required for:

- Salesforce user licenses consumed by sandbox and Developer Edition organizations.
- Salesforce Chatter Free, Chatter Only, Chatter External user licenses.
- Salesforce Partner Community, Customer Community, Customer Community Plus user licenses.
- Salesforce Identity licenses.

If the quantity of total reported user licenses of all Salesforce production organizations protected by Veeam Backup for Salesforce management servers that use the same license key exceeds the limit of license units for more than 10 Users or 10% of licensed units (whichever is greater), you will not be able to perform backup operations, and add new Salesforce organizations that you want to protect until you update the license.

#### IMPORTANT

The management server must have the outbound internet access to communicate with Salesforce API, Veeam License and Update Notification servers. If the connection is lost, Veeam Backup for Salesforce will not be able to activate new licenses, will continue operating for 30 days under the current license, and then halt all backup operations.

## License Types

Veeam Backup for Salesforce is available in the following license editions:

- **Community Edition** the built-in license that allows you to protect up to 50 Users free of charge. This license comes without any technical support. Only community and best-effort technical support are available.
- NFR, Evaluation— the licenses that can be used for product demonstration, training or education. These licenses are not for resale or commercial use. For more information, see Veeam End User License Agreement (EULA).
- Subscription the subscription-based license that expires at the end of the subscription term. The maximum number of users protected by Veeam Backup for Salesforce depends on the number of units specified in your license.

To purchase the license, it is required to provide the production ID of a Salesforce organization that you will protect with Veeam Backup for Salesforce. If you plan to protect more than one production organization, you can provide the ID of any of these organizations. To learn how to find the Salesforce Organization ID, see Salesforce Documentation.

#### NOTE

Users of Salesforce sandbox organizations do not consume license units, you can protect as many sandbox organizations as you want — the total number of user licenses of sandbox organizations does not affect license usage. However, you cannot use the *Community Edition* or other license type to protect a sandbox organization if the quantity of Salesforce users in this organization exceeds the limit of licensed Users in your Veeam license.

To learn how to obtain the license, contact a Veeam sales representative at Sales Inquiry.

#### Grace Period

A grace period provides a short-term buffer in cases when the license renewal was delayed, the licensed User threshold was exceeded or licensing servers cannot be reached. The grace period is usually enabled once for the next 30 days starting from the violation date and automatically reset when the violation is resolved.

# Installing and Removing License

On the **License** tab, you can see the current license details, install a new license or remove the currently used license.

To purchase new license, renew or add more licenses, you can contact Veeam partners or request a quote from a Veeam sales representative. For more information, see the Veeam website.

#### Installing License

To install or update a license installed on the management server, do the following:

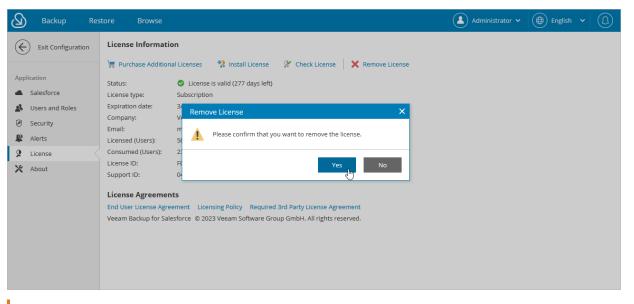
- 1. Switch to the **Configuration** page.
- 2. Navigate to License.
- 3. Click Install License.
- 4. In the Install License window, click Browse to browse to a license file, and then click Upload.

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$\langle \epsilon$	Exit Configuration	UII	cense Informati		
	lication Salesforce	Sta	Purchase Addition	<ul> <li>License is valid (277 days left)</li> </ul>	e License
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			-	eement Licensing Policy Required 3rd Party License Agreement lesforce © 2023 Veeam Software Group GmbH. All rights reserved.	

## **Removing License**

To remove a license installed on the management server if you no longer need it:

- 1. On the License tab, click Remove License.
- 2. In the **Remove License** window, click **Yes** to confirm that you want to remove the license.



#### IMPORTANT

After you remove the license, Veeam Backup for Salesforce will automatically switch back to the built-in *Community Edition* license. In this case, you will be able to protect maximum 50 Salesforce licensed users. For more information on license editions, see Licensing.

## Viewing License Information

The license validity is verified by the Veeam License Server right after the installation and, then, periodically once a week. You can also verify the license manually, to do that:

- 1. Switch to the **Configuration** page.
- 2. Navigate to License and click Check License.

During license validation, the counts of users per protected Salesforce organization are reported to Veeam Backup for Salesforce, and then used in license metering and billing. In case licensing servers cannot be reached and new licenses cannot be installed, the grace period starts automatically from the last successful license check date.

The License information section provides general information on the Veeam Backup for Salesforce license:

- Status the license status. The status depends on the license edition, the number of days remaining until license expiration and the license check result.
- License type the license type (*Community Edition, Evaluation, NFR, Subscription*).
- **Expiration date** the date when the license will expire.
- **Company** the name of a company to which the license was issued.
- **Email** email address of the license administrator.
- Licensed (Users) the total number of licensed Users.
- **Consumed (Users)** the total number of consumed user licenses across all protected Salesforce organizations.
- License ID the unique identification number of the license file.
- **Support ID** the unique identification number of the Veeam support contract.

${}$	Backup Res	tore Browse		Administrator 🗸	English 🗸		
$\langle$	Exit Configuration	License Informati	on				
		🐙 Purchase Addition	al Licenses 🛛 🕺 Install License 🛛 🌾 Check License 🛛 🗙 Remove License				
	lication	Status:	License is valid (67 days left)				
-	Salesforce	License type:	Subscription				
	Users and Roles	Expiration date:	3/1/24				
Ø	Security	Company:	Veeam Software				
10	Alerts	Email:	rd@veeam.com				
		Licensed (Users):	6000				
2	License	Consumed (Users): License ID:	5 60D11111-6DDDD-7777-7FFF-9B0E13C51D9B				
Х	About	Support ID:	02802808				
		Support ID.	02002000				
		License Agreements					
		End User License Agreement Licensing Policy Required 3rd Party License Agreement					
		Veeam Backup for Salesforce © 2023 Veeam Software Group GmbH. All rights reserved.					

# Deployment

You can install Veeam Backup for Salesforce on a virtual or a physical machine.

Before you begin installation, check the following prerequisites:

1. Make sure that the machine where you plan to install Veeam Backup for Salesforce meets the minimal system requirements and the required ports are open. You must be also able to access the Salesforce authentication webpage from the machine.

It is recommended that you install Veeam Backup for Salesforce on a new or empty machine so that the management server does not conflict with other applications. Consider having enough free disk space for the log, metadata and file storage. For more information on the required disk space, see System Requirements.

- 2. To install Veeam Backup for Salesforce software packages, you must use the root or super user account to install the system components and services.
- 3. If you have SELinux installed, you must allow httpd to connect to the network. To do that, run the following command:

```
sudo setsebool -P httpd_can_network_connect on
```

4. [Applies to CentOS 7 only] An EPEL repository must be added to allow nginx installations. To add the repository, run the following command:

sudo yum install epel-release

For more information on EPEL, see EPEL Documentation.

# Installing Veeam Backup for Salesforce on RedHat, Oracle and CentOS Machines

You can install Veeam Backup for Salesforce on a RedHat, Oracle or CentOS machine automatically using the installation script or manually.

## Installing Product Using Script

To install Veeam Backup for Salesforce, complete the following steps:

1. Set the Linux system locale to UTF-8 running the following command:

```
sudo localectl set-locale LANG=en US.UTF-8
```

- 2. Log out of the current session and log back in to apply the new locale settings.
- 3. Download the installation script to the machine where you want to deploy Veeam Backup for Salesforce running the following command:

```
sudo curl https://repository.veeam.com/yum/el/vbsf-install-script.sh --out
put ./vbsf-install-script.sh
```

4. Run the script:

```
sudo sh ./vbsf-install-script.sh
```

The Linux package manager will install the Veeam software repository. When the repository is installed, the manager will start installation of Veeam Backup for Salesforce and dependencies, and run configuration checks.

After all configuration checks complete successfully, you will be prompted to run the server configuration script on the Linux host. For more information, see Configuring Server Settings.

#### Installing Product Manually

To install Veeam Backup for Salesforce, complete the following steps:

1. Update all installed Linux packages and their dependencies running the following command:

```
sudo yum update -y
```

2. Set the Linux system locale to UTF-8 running the following command:

```
sudo localectl set-locale LANG=en US.UTF-8
```

- 3. Log out of the current session and log back in to apply the new locale settings.
- 4. Download the Veeam software repository installation package (veeam-release) from the Veeam Download page:

```
sudo curl http://repository.veeam.com/yum/el/veeam-repo-1.0.1-6.x86_64.rpm
--output veeam-repo.rpm
```

4. Install the Veeam software repository:

```
sudo yum install -y ./veeam-repo.rpm
```

5. Install the product from the Veeam software repository:

```
sudo yum install -y vbsf
```

The Linux package manager will start installation of Veeam Backup for Salesforce and dependencies, and then run configuration checks.

After all configuration checks complete successfully, you will be prompted to run the server configuration script. For more information, see Configuring Server Settings.

update-alternatives: using /usr/lib/jvm/java-11-openjdk-amd64/bin/rmid to provide /usr/bin/rmid (rmid) in auto mode update-alternatives: using /usr/lib/jvm/java-11-openjdk-amd64/bin/pack200 to provide /usr/bin/pack200 (pack200) in auto mode update-alternatives: using /usr/lib/jvm/java-11-openjdk-amd64/bin/pack200 to provide /usr/bin/pack200 (pack200) in auto mode update-alternatives: using /usr/lib/jvm/java-11-openjdk-amd64/bin/pack200 to provide /usr/bin/pack200 (pack200) in auto mode Setting up vobs? (2.0-6.9313) ... Generate product key Created symlink /etc/systemd/system/multi-user.target.wants/vbsf-backend.service + /lib/systemd/system/vbsf-backend.service. Created symlink /etc/systemd/system/multi-user.target.wants/vbsf-backend.service + /lib/systemd/system/vbsf-restore.service. The package "Veeam Backup for Salesforce" has been installed. To begin with server configuration, please run the script: sudo sh /opt/vbsf/server-configuration.sh seconning processes... Scanning processes... Running kernel seems to be up-to-date. No services need to be restarted. No containers need to be restarted. No user sessions are running outdated binaries.

## **Configuring Server Settings**

To perform server configuration, run the configuration script:

sudo sh /opt/vbsf/server-configuration.sh

To complete server configuration, do the following:

1. Confirm that you have enough disk space to store backup data.

#### NOTE

To store backups of Salesforce files and metadata, Veeam Backup for Salesforce will create a file repository per each protected Salesforce organization on the management server in the following folder: /opt/vbsf/data. If you want to change the folder, modify the data.storage.location parameter value as described in section Configuring Advanced Settings.

2. Choose whether you want to install PostgreSQL on the management server.

When installing PostgreSQL locally on the management server, Veeam Backup for Salesforce will run the installation script and create two users: the **postgres** user – the root database user, and the **vbsf** user – the local user. The **vbsf** user will be automatically provisioned into the default application configuration.

User credentials will be automatically generated and saved to the /opt/vbsf/vbsfbackend/vbsf\_default\_credentials.properties file. If you change the created passwords using the PostgreSQL standard methods, the passwords stored in the file will not automatically change and will become invalid.

#### NOTE

You may want to install PostgreSQL locally on the management server to host the configuration database which will help you avoid connectivity issues. It is recommended that you create databases that will be used to protect production and sandbox Salesforce organizations on remote PostgreSQL servers. Creating the databases on the management server may cause disk space issues.

- 3. Confirm that you want to configure Firewalld to allow incoming HTTPS connections through port 443. This is required to access the Web UI component from a user workstation. For more information, see Ports.
- 4. Choose whether you want to automatically configure nginx settings required for the management server to work properly.

It is recommended that you allow Veeam Backup for Salesforce to configure nginx automatically. To learn how to configure nginx manually, see this Veeam KB article.

After the automatic nginx configuration completes, Veeam Backup for Salesforce displays the web address that will be used to launch the initial configuration wizard. The address contains an IPv4 address of the server and a token used to authorize the user access.

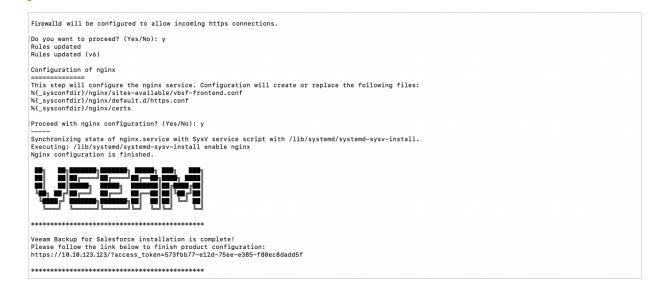
#### TIP

If you accidentally close the terminal or the connection session during installation, or if you configure nginx manually, you can find the web address URL in the /opt/vbsf/access\_token.txt file on the machine where Veeam Backup for Salesforce is installed.

7. Copy the automatically generated URL and paste it into a web browser to proceed with the initial configuration of Veeam Backup for Salesforce.

#### **IMPORTANT**

By default, the URL contains an IP address of the management server. If the specified IP address is not available over HTTPS, replace it with the public IP of the management server or the DNS name configured for the machine where the Veeam Backup for Salesforce is installed.



# Installing Veeam Backup for Salesforce on Ubuntu Machines

You can install Veeam Backup for Salesforce on an Ubuntu machine automatically using the installation script or manually.

#### Installing Product Using Script

To install Veeam Backup for Salesforce, complete the following steps:

1. Set the Ubuntu system locale to UTF-8 running the following command:

```
sudo localectl set-locale LANG=en_US.UTF-8
sudo update-locale
```

- 2. Log out of the current session and log back in to apply the new locale settings.
- 3. Download the installation script to the machine where you want to deploy Veeam Backup for Salesforce running the following command:

```
sudo curl https://repository.veeam.com/apt/stable/amd64/vbsf-install-scrip
t.sh --output ./vbsf-install-script.sh
```

4. Run the script:

sudo bash ./vbsf-install-script.sh

The Ubuntu package manager will install the Veeam software repository. When the repository is installed, the manager will start installation of Veeam Backup for Salesforce and dependencies, and run configuration checks.

After all configuration checks complete successfully, you will be prompted to run the server configuration script on the Ubuntu host. For more information, see Configuring Server Settings.

#### Installing Product Manually

To install Veeam Backup for Salesforce, complete the following steps:

1. Update all installed Ubuntu packages and their dependencies running the following command:

```
sudo apt update -y
```

2. Set the Ubuntu system locale to UTF-8 running the following command:

```
sudo localectl set-locale LANG=en_US.UTF-8
sudo update-locale
```

- 3. Log out of the current session and log back in to apply the new locale settings.
- 4. Download the Veeam software repository installation package (veeam-release) from the Veeam Download page:

```
sudo curl http://repository.veeam.com/apt/stable/amd64/veeam-repo_1.0.0-13
_amd64.deb --output veeam-repo.deb
```

4. Install the Veeam software repository:

```
sudo apt install -y ./veeam-repo.deb
```

5. Install the product from the Veeam software repository:

```
sudo apt-get -y update
sudo apt install -y vbsf
```

The Ubuntu package manager will start installation of Veeam Backup for Salesforce and dependencies, and then run configuration checks.

After all configuration checks complete successfully, you will be prompted to run the server configuration script. For more information, see Configuring Server Settings.

```
update-alternatives: using /usr/lib/jwm/java-11-openjdk-amd64/bin/rmid to provide /usr/bin/rmiregistry (rmiregistry) in auto mode
update-alternatives: using /usr/lib/jwm/java-11-openjdk-amd64/bin/pack200 to provide /usr/bin/pack200 (pack200) in auto mode
update-alternatives: using /usr/lib/jwm/java-11-openjdk-amd64/bin/pack200 to provide /usr/bin/pack200 (pack200) in auto mode
update-alternatives: using /usr/lib/jwm/java-11-openjdk-amd64/bin/pack200 to provide /usr/bin/pack200 (pack200) in auto mode
update-alternatives: using /usr/lib/jwm/java-11-openjdk-amd64/bin/pack200 to provide /usr/bin/jack200 (pack200) in auto mode
Setting up vobs (2.0.6-3813) ...
Generate product key
Created symlink /etc/system/system/multi-user.target.wants/vbsf-backend.service + /lib/systemd/system/vbsf-backend.service.
Created symlink /etc/system/system/multi-user.target.wants/vbsf-restore.service + /lib/systemd/system/vbsf-restore.service.
Treated symlink /etc/system/system/system/multi-user.target.wants/vbsf-restore.service + /lib/systemd/system/vbsf-restore.service.
Treated symlink /etc/system/system/system/system/ubsf-restore.service + /lib/system/system/vbsf-restore.service.
Treated symlink /stc/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/system/sys
```

## **Configuring Server Settings**

To perform server configuration, run the configuration script:

sudo bash /opt/vbsf/server-configuration.sh

To complete server configuration, do the following:

1. Confirm that you have enough disk space to store backup data.

#### NOTE

To store backups of Salesforce files and metadata, Veeam Backup for Salesforce will create a file repository per each protected Salesforce organization on the management server in the following folder: /opt/vbsf/data. If you want to change the folder, modify the data.storage.location parameter value as described in section Configuring Advanced Settings.

2. Choose whether you want to install PostgreSQL on the management server.

When installing PostgreSQL locally on the management server, Veeam Backup for Salesforce will run the installation script and create two users: the **postgres** user – the root database user, and the **vbsf** user – the local user. The **vbsf** user will be automatically provisioned into the default application configuration.

User credentials will be automatically generated and saved to the /opt/vbsf/vbsfbackend/vbsf\_default\_credentials.properties file. If you change the created passwords using the PostgreSQL standard methods, the passwords stored in the file will not automatically change and will become invalid.

#### NOTE

You may want to install PostgreSQL locally on the management server to host the configuration database which will help you avoid connectivity issues. It is recommended that you create databases that will be used to protect production and sandbox Salesforce organizations on remote PostgreSQL servers. Creating the databases on the management server may cause disk space issues.

- 3. Confirm that you want to configure firewall to allow incoming HTTPS connections through port 443. This is required to access the Web UI component from a user workstation. For more information, see Ports.
- 4. Choose whether you want to automatically configure nginx settings required for the management server to work properly.

It is recommended that you allow Veeam Backup for Salesforce to configure nginx automatically. To learn how to configure nginx manually, see this Veeam KB article.

After the automatic nginx configuration completes, Veeam Backup for Salesforce displays the web address that will be used to launch the initial configuration wizard. The address contains an IPv4 address of the server and a token used to authorize the user access.

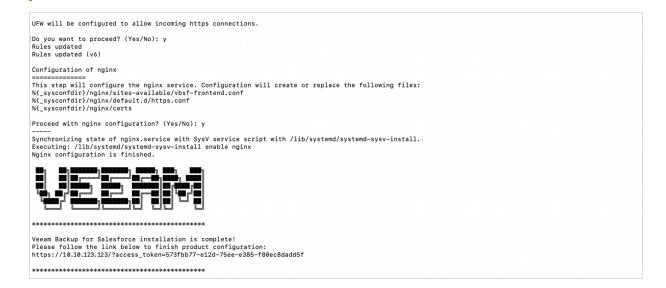
#### TIP

If you accidentally close the terminal or the connection session during installation, or if you configure nginx manually, you can find the web address URL in the /opt/vbsf/access\_token.txt file on the machine where Veeam Backup for Salesforce is installed.

7. Copy the automatically generated URL and paste it into a web browser to proceed with the initial configuration of Veeam Backup for Salesforce.

#### **IMPORTANT**

By default, the URL contains an IP address of the management server. If the specified IP address is not available over HTTPS, replace it with the public IP of the management server or the DNS name configured for the machine where the Veeam Backup for Salesforce is installed.



# Performing Initial Configuration

To start working with Veeam Backup for Salesforce, you must perform the initial configuration of the management server. To do that, in a web browser, navigate to the web address that has been automatically generated by Veeam Backup for Salesforce during installation. The address must contain a public IPv4 address or DNS name of the server that is available over HTTPS, and a token used to authorize the first user access.

The unique token is not dependent on the host name. If the host is accessible by several IP addresses, or you have configured a proper domain name, you can replace the host address with the more appropriate one.

#### IMPORTANT

Consider the following:

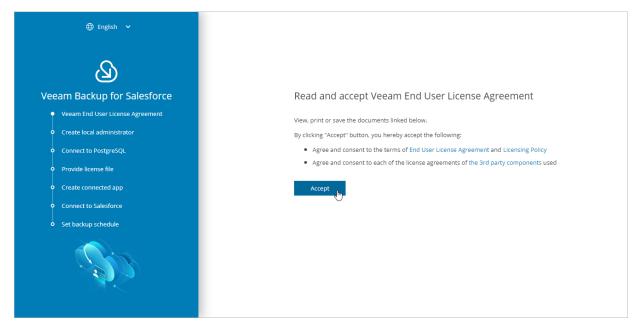
- Internet Explorer is not supported. To access Veeam Backup for Salesforce, use the latest versions of Microsoft Edge, Mozilla Firefox (except Mozilla Firefox for Linux), Safari and Google Chrome.
- You must be able to access the Salesforce authentication webpage from the machine that you use to log in to Veeam Backup for Salesforce.
- The management server is using a self-signed SSL certificate for nginx. However, this certificate is not trusted and will trigger a browser certificate warning. You can replace the certificate manually to the trusted one as soon as you finish the configuration, as described in Appendix B. Replacing Security Certificate.

To configure the management server, complete the initial configuration wizard:

- 1. Read and accept license agreement.
- 2. Create the default administrator.
- 3. Connect to a PostgreSQL database.
- 4. Provide a Veeam Backup for Salesforce license file.
- 5. Create a Salesforce Connected App.
- 6. Connect to a Salesforce organization.
- 7. Specify backup schedule settings.
- 8. Finish working with the wizard.

## Step 1. Accept License Agreement

At the **Veeam End User License Agreement** step of the wizard, read and accept the Veeam license agreement, Veeam licensing policy and 3rd party components license agreements. If you reject the agreements, you will not be able to continue initial configuration.



## Step 2. Create Local Administrator

At the **Create local administrator** step of the wizard, specify a password for the local administrator account. The password must contain uppercase and lowercase Latin letters and special characters (!@#\$%^&`~\*()\_- =+[]{};':\"|,./<>?). The minimum length of the password is 8 characters. You can change the password of the local administrator as described in section Editing Users.

This is the only local user account that can perform all operations in Veeam Backup for Salesforce including configuration of IdP and SSO settings. Consider that you will not be able to remove or change this account using the Web UI.

After you finish the initial configuration, you will be able to add other users and assign them granular permissions. For more information, see Managing Users.

⊕ English ∨	
ک	← Back
Veeam Backup for Salesforce	Create local administrator
Veeam End User License Agreement     Username:	admin
<ul> <li>Create local administrator</li> </ul>	
Connect to PostgreSQL	
Provide license file	•
• Create connected app	Next
Connect to Salesforce	2""
• Set backup schedule	

### Step 3. Connect to Database

At the **Connect to PostgreSQL** step of the wizard, specify connection settings that will be used to access the following databases:

- The configuration database that will be used to store product data, backup policies, restore jobs, sessions and so on.
- A database that will be used to store backups of all objects, fields, records and relationships of the Salesforce organization connected at step 6.

#### NOTE

If you perform configuration of the existing deployment of Veeam Backup for Salesforce, at the **Connect to PostgreSQL** step of the wizard, specify connection settings that will be used to access the existing configuration database.

To configure connection settings, do the following:

- 1. In the **PostgreSQL address** field, specify the DNS name or IP address of a PostgreSQL server that will host the databases.
- 2. In the **Port** field, choose a network port that will be used by Veeam Backup for Salesforce to connect to the PostgreSQL server. The default port number is 5432.
- 3. Use the **Username** and **Password** fields to provide credentials of the PostgreSQL user that will be used to access the databases. The user must be assigned permissions required to create database schemas.

Keep in mind that if you want Veeam Backup for Salesforce to be able to create the required databases automatically, the user must also be assigned permissions required to create databases. Otherwise, you have to create the empty databases on the specified server manually beforehand.

#### NOTE

If you have chosen the option to automatically install PostgreSQL on the management server during Veeam Backup for Salesforce deployment, this step will contain the predefined values: in the **PostgreSQL address** field, the address of the management server will be specified, in the **Username** and **Password** fields, credentials of the **vbsf** PostgreSQL user created when installing PostgreSQL will be provided.

By default, Veeam Backup for Salesforce creates new databases with the following names:

- vbsf\_backup the name used for the database that will store the backed-up data.
- **vbsf\_application** the name used for the configuration database.

If you want to rename the databases or specify the existing ones, set the **Customize** toggle to *On*, and specify the custom names.

#### TIP

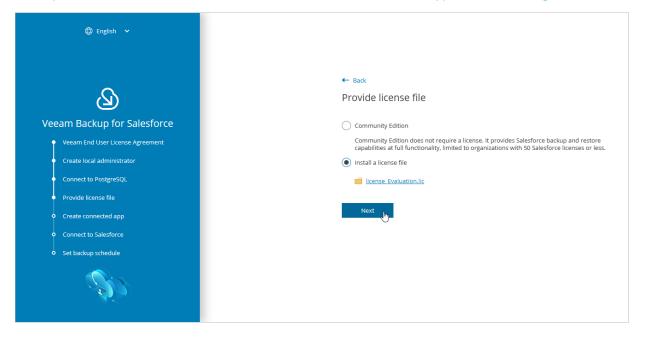
During the initial configuration, you will be prompted to connect to a Salesforce organization that will be protected by a backup policy, which is automatically created by the product. You can skip the default policy creation and connect to a database later when you create a backup policy.

	🌐 English 🗸		
	۵		Connect to PostgreSQL server
Veea	m Backup for Salesforce	PostgreSQL address:	dbhost.local
Ť	Veeam End User License Agreement	Port:	5432
	Create local administrator	Username:	vbsf
	Connect to PostgreSQL	Password:	•••••
	Provide license file	Customize:	On 🚺
	Create connected app		Application databases
	Connect to Salesforce	Configuration database:	veeam
	Set backup schedule	Salesforce data:	veeam_data
			Skip backup policy creation

## Step 4. Provide License File

At the **Provide license file** step of the wizard, select the **Install a license file** option and browse to the license file supplied to you by Veeam. After you install the license file, Veeam Backup for Salesforce will connect to the Veeam License Server and start the license validation process. As soon as validation completes, you will be able to proceed to the next step of the wizard.

If you do not have a valid license, you can get a 30-day trial license key or proceed with the wizard without providing a license. To proceed with the wizard without providing a license, select the **Community Edition** option. In this case, the built-in *Community Edition* license that allows you to protect Salesforce organizations with up to 50 Users will be installed. For more information on license types, see Licensing.



## Step 5. Create Connected App

At the **Create Connected App** step of the wizard, you must configure a Connected App in Salesforce. Security credentials of the Connected App will be used to authorize access to all Salesforce organizations protected by this Veeam Backup for Salesforce installation.

Salesforce Connected App allows Veeam Backup for Salesforce to authenticate with Salesforce and get access to resources that will be protected. You can create the Connected App in any Salesforce organization. To learn how to create the Connected App, see this Veeam KB article.

#### NOTE

You will be able to change the Connected App as described in section Changing Connected App Tokens, but you must consider that after changing the Connected App, you will have to re-authorize all Salesforce connections added to Veeam Backup for Salesforce.

When you create the Connected App, consider the following:

- Creation of the Connected App and any changes to its configuration will take up to 10 minutes to apply on the Salesforce side.
- The Connected App must be assigned the **Full access** (full), **Perform requests at any time** (refresh\_token, offline\_access) and **Access unique user identifiers** (openid) OAuth scopes. For more information on OAuth scopes in Salesforce, see Salesforce Documentation.
- The callback URL specified in the *Callback URLs* list of the Connected App must match the management server FQDN that you use to access the Veeam Backup for Salesforce Web UI.

Consider the following example:

You installed Veeam Backup for Salesforce on the machine with the following IP address: *172.12.0.1*. To properly configure the Connected App, you have copied the URL from the **Callback URL** field at the **Create connected app** step of the initial configuration wizard and added it to the Connected App *Callback URLs* list.

Later, you decide to create the following DNS name for the machine running Veeam Backup for Salesforce: *acme.internal.com*. In this case, you must add the following callback URL to the Connected App *Callback* URLs list: *https://acme.internal.com*.

After that, your *Callback URLs* list will contain the following URLs:

- o https://172.12.0.1
- https://acme.internal.com

#### IMPORTANT

You can protect multiple Salesforce organizations using a single Veeam Backup for Salesforce installation. However, due to the Salesforce Connected App limit of 5 authorizations per client, authorization issues may occur when you have several product installations leveraging the same Connected App. That is why it is recommended that you create a dedicated Connected App for each product deployment.

For more information on Salesforce OAuth Authorization Flows and Connected Apps, see Salesforce Documentation.

⊕ English 🗸		
Veeam Backup for Salesforce	Domain name:	← Back Create Salesforce Connected App First. specify the domain name you will use to access the Veeam Backup for Salesforce. This domain name must be configured and reachable for the product installation. 172.22.122.22 You can adjust this setting later
<ul> <li>Connect to PostgreSQL</li> </ul>		Create a Salesforce Connected App and setup the Callback URL
Provide license file     Create connected app		Initial connection to Salesforce requires setting up a Connected App in Salesforce. Copy & paste the Callback URL setting below into the Connected App Callback URL settings in Salesforce.
Connect to Salesforce	Callback URL:	Read KB on Salesforce Connected App  https://172.22.122.22  Copy to Clipboard
• Set backup schedule		Next

### Step 6. Connect to Salesforce

At the **Connect to Salesforce** step of the wizard, connect to a Salesforce organization that will be automatically added to Veeam Backup for Salesforce and protected by the default backup policy. The backup policy is created by Veeam Backup for Salesforce during the initial configuration unless you disabled the default policy creation at step 3 of the wizard. For more information on backup policies, see Performing Backup.

To connect to the organization, do the following:

1. Choose whether you want to connect to a Salesforce organization hosted on a production instance, sandbox instance or custom domain.

If you select the **Custom** option, you must also provide the organization domain name. If you specify a *lightning.force.com*, *my.salesforce-sites.com* or *my.site.com* domain names, keep in mind that the product will automatically change this name to *my.salesforce.com*.

2. Provide the consumer key and consumer secret created in the Connected App, and click **Connect**. You will be redirected to the Salesforce authentication webpage.

To learn how to create the key and the secret, see this Veeam KB article.

#### **IMPORTANT**

It takes up to 10 minutes for Salesforce to apply any changes in a Connected App. During this time you may get an error that key and secret pair is not active or a callback URL is configured incorrectly.

🕀 English 🗸	
	← Back Connect to Salesforce
Veeam Backup for Salesforce	Verify with Salesforce domain:
• Veeam End User License Agreement	Production 🗸
	Salesforce login domain:
<ul> <li>Create local administrator</li> </ul>	https://login.salesforce.com/
<ul> <li>Connect to PostgreSQL</li> </ul>	Consumer key:
Provide license file	srpcZO956qnsIUe5wDH7s1r7xavm0Buv32dEBsrpcZOKpO
<ul> <li>Create connected app</li> </ul>	Consumer secret:
	••••••
Connect to Salesforce	Obtaining Consumer Key and Consumer Secret in Salesforce
<ul> <li>Set backup schedule</li> </ul>	When setting the Connected App in Salesforce, please pay attention to the Callback URL details.
	Callback URL must exactly match the server address.
	Read KB on Salesforce Connected App
	Connect

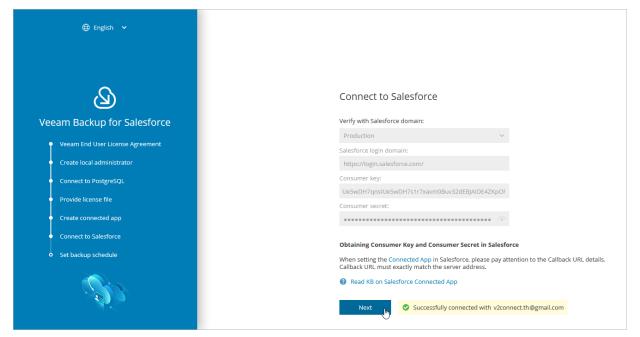
3. On the Salesforce authentication webpage, enter credentials of an account created in the Salesforce organization that you want to protect, and click **Log in**.

The specified account must be assigned permissions required for Veeam Backup for Salesforce to be able to perform backup and restore operations. For more information, see Required Permissions.

#### NOTE

Veeam Backup for Salesforce does not have access to Salesforce user credentials. To authorize and access Salesforce data, Veeam Backup for Salesforce uses OAuth tokens of the Connected App created during the initial configuration. You can change the Connected App as described in section Changing Connected App Tokens, but you must consider that after changing the Connected App, you will have to re-authorize all Salesforce connections added to Veeam Backup for Salesforce.

4. Back to the Veeam Backup for Salesforce wizard, click Next to proceed with the initial configuration.



# Step 7. Set Backup Policy Schedule

[Applies only if you have not selected the Skip backup policy creation check box]

At the **Set backup schedule** step of the wizard, choose one of the built-in schedules that will be used to run the backup policy:

- **Hourly** select this schedule if you want the backup policy session to be launched at the beginning of every hour.
- **Daily** select this schedule if you want the backup policy session to be launched every day at 00:00 UTC.
- Weekly select this schedule if you want the backup policy session to be launched every Sunday at 00:00 UTC.

You can change these settings later as described in section Editing Backup Policies.

#### TIP

If you want Veeam Backup for Salesforce to start a backup session for the Salesforce organization right after the initial configuration process completes, select the **Start backup policy after finish** check box.

) English 🗸	
<b>Solution</b> Veeam Backup for Salesforce	← Back Set backup policy schedule
	Schedule: Daily
<ul> <li>Veeam End User License Agreement</li> </ul>	Start backup policy after finish
Create local administrator	Finish
<ul> <li>Connect to PostgreSQL</li> </ul>	
• Provide license file	
Create connected app	
Connect to Salesforce	
Set backup schedule	
<u>S</u>	

## Step 8. Finish Working with Wizard

At the last step of the wizard, click **Go to Application**. After the initial configuration process completes, Veeam Backup for Salesforce will open the product Web UI.

🌐 English 🗸	
S Veeam Backup for Salesforce	Initial setup completed
Veeam End User License Agreement     Create local administrator     Connect to PostgreSQL     Provide license file     Create connected app     Connect to Salesforce     Set backup schedule	Go to Application
Set backup schedule	

# Accessing Veeam Backup for Salesforce

To access Veeam Backup for Salesforce, in a web browser, navigate to the Veeam Backup for Salesforce web address. The address consists of a public IPv4 address or a DNS name of the machine where Veeam Backup for Salesforce is installed. Keep in mind that the website is available over HTTPS only.

#### IMPORTANT

Internet Explorer is not supported. To access Veeam Backup for Salesforce, use the latest versions of Microsoft Edge, Mozilla Firefox (except Mozilla Firefox for Linux), Safari or Google Chrome.

### Logging In

To log in to Veeam Backup for Salesforce, do the following:

1. In the Username and Password fields, specify credentials of a Veeam Backup for Salesforce user.

If you log in for the first time, use credentials of the default Administrator that was created after the product installation. In future, you can add other user accounts to grant access to Veeam Backup for Salesforce. For more information, see Managing Users.

2. Click Log in.

If you have previously connected an Azure AD or enabled a Salesforce organization as an identity provider in Veeam Backup for Salesforce, you can click **Single sign-on with Azure AD** or **Single sign-on with Salesforce**. You will be redirected to the authorization page. If you have not logged in yet, log in to the identity provider portal. After that, you will be redirected to the Veeam Backup for Salesforce page as an authorized user. To learn how to configure the identity provider in Veeam Backup for Salesforce, see Configuring IdP and SSO Settings.

,	ے Veeam Backup for Salesforce/	
	Please log in admin  Log in Forgot password?	
	Or Single sign-on with Azure AD	

### Logging Out

To log out, at the top right corner of the Veeam Backup for Salesforce page, click the user name and then click **Log out**.

# Configuring Veeam Backup for Salesforce

Right after you perform the initial configuration, you can start working with Veeam Backup for Salesforce. If you want to add users that can access Veeam Backup for Salesforce, to add databases used to protect Salesforce organizations, and to configure additional settings, follow the instructions in these sections:

- Managing Salesforce Organizations
- Managing Companies
- Managing Databases
- Managing Users
- Managing Alerts
- Changing Connected App Tokens

# Managing Salesforce Organizations

Salesforce organizations can be added to Veeam Backup for Salesforce either automatically when you create backup policies or manually as described in section Adding Organizations. When you connect to a Salesforce organization, the basic organization details and the OAuth authentication tokens of the Connected App are saved to the configuration database.

#### NOTE

Veeam Backup for Salesforce does not have access to Salesforce user credentials. To authorize and access Salesforce data, Veeam Backup for Salesforce uses OAuth tokens of the Connected App created during the initial configuration. You can change the Connected App as described in section Changing Connected App Tokens, but you must consider that after changing the Connected App, you will have to re-authorize all Salesforce connections added to Veeam Backup for Salesforce.

Salesforce organizations added to Veeam Backup for Salesforce are grouped to companies. For more information on companies, see Managing Companies.

### In This Section

- Adding Organizations
- Editing Organizations
- Removing Organizations

## Adding Organizations

To add a new Salesforce organization, do the following:

- 1. Switch to the **Configuration** page.
- 2. Navigate to **Salesforce** > **Salesforce** Orgs.
- 3. Click Add Salesforce Organization. The Add Salesforce Organization window will open.
- 4. In the **Log in with Salesforce account** section, connect to a Salesforce organization that you want to add. To do that:
  - a. Choose whether you want to use a Salesforce organization hosted on a production instance, sandbox instance or custom domain. If you select the **Custom** option, you must also specify the organization domain name.
  - b. Click Log in with Salesforce account. You will be redirected to the Salesforce authentication webpage.
  - c. On the Salesforce authentication webpage, enter credentials of a Salesforce user of the organization that you want to add, and click **Log in**. After that, you will be redirected back to the **Add Salesforce Organization** window in Veeam Backup for Salesforce.

The specified Salesforce user must be assigned permissions required for Veeam Backup for Salesforce to be able to perform backup and restore operations. For information, see Required Permissions.

- 5. In the **Add Salesforce Organization** window, in the **Select company** section, choose whether you want to assign the organization to an existing or to a new company:
  - If you want to add a new company to Veeam Backup for Salesforce and to assign the organization to it, select the **Create new company** option, and specify a name for the new company.
  - If you want to assign the organization to an existing company, select the **Choose existing company** option, and choose the necessary company from the drop-down list.

For a company to be displayed in the list, it must be created beforehand as described in section Adding Companies.

6. Click Save.

Exit Configuration	Salesforce Orgs	Companies Databases		🜐 English 👻 💭
pplication	Filter by text	🔍 🕂 Add Salesforce Organization 🧪 Edit Connection 🗔 Rename	🖏 Change Company	🗙 Delete
Salesforce	Salesforce Alias	Add Salesforce Organization X	lesforce User	Salesforce ID
Users and Roles	Selected: 0 of 4	Log in with Salesforce account		
9 Security	📃 🥝 Veeam - Home		axiivatio.v2@gmail.com	00D5e000002UMGQEA4
Alerts	📃 🥝 Veeam - artx2	Production (login.salesforce.com)	ax@veeam.com.artx2	00D8C0000004fDMUAY
License	📃 🥝 Veeam - partia	🚢 Log in with Salesforce account	ax@veeam.com.partial	00D4C0000001BQPUA2
About	📃 🔮 Veeam - fsi (sa	Select company	ax@veeam.com.fsi	00D74000000MgSEAU
		Assign this Salesforce organization to a company  Create new company  Bonatti Company		
		Company name should be unique		
		Choose existing company		
		Choose Y		
		Save Cancel		

# **Editing Organizations**

For each Salesforce organization added to the configuration database, you can change the alias – organization name displayed in the Veeam Backup for Salesforce Web UI, edit connection settings and re-assign the organization to another company.

### **Renaming Organizations**

When you connect to a Salesforce organization, Veeam Backup for Salesforce automatically collects basic organization details and uses the organization ID to create an alias. To change the alias, do the following:

- 1. Switch to the **Configuration** page.
- 2. Navigate to Salesforce > Salesforce Orgs.
- 3. Select the necessary organization and click **Rename**.
- 4. In the **Rename Salesforce Alias** window, specify a new name that will be displayed in the **Salesforce Alias** column of the **Salesforce Orgs** tab, and click **Apply**.

${\bf B}$	Backup Res	tore Browse				Admini	istrator 🗸 🔘 Eng	lish 🖌 💭
$\langle$	• Exit Configuration	Salesforce Orgs Companies	Databases					
Арр	lication	Filter by text Q	+ Add Salesforce Organi	zation 🥢 Edit (	Connection 🛛 🏹 Rena	me 📲 Chang	e Company 🛛 🗙 Del	ete
-	Salesforce	Salesforce Alias	Company	Instance	Salesforce Edition	Salesforce	Salesforce ID	Databa ↑
24	Users and Roles	Selected: 1 of 4						
۲	Security	Veeam - Homeoffice v2 (production)	Veeam	NA162	Developer Edition	mitionano.v	00D5e000002U	lab1_m
₽ <b>₽</b>	Alerts	Veeam - mab2 (sandbox)	Veeam	C5216	Base Edition	veax@veea	00D8C0000004f	Max2
ğ	License	📃 🔮 Veeam - fsi (sandbox)	Rename Salesforce	Alias	×	veax@veea	00D740000000M	_ ·
Х	About	Veeam - partial (sandbox)				veax@veea	00D4C0000001B	
			New Alias: Veeam -	Bank Connection				
				Apply اللہ	Cancel			

### Changing Company

To assign organizations to another company, do the following:

- 1. Switch to the **Configuration** page.
- 2. Navigate to **Salesforce** > **Salesforce** Orgs.
- 3. Select the necessary organization, and click Change Company.
- 4. In the **Change Company** window:
  - a. Choose whether you want to assign the organization to an existing or to a new company.
    - If you want to add a new company to Veeam Backup for Salesforce and to re-assign the organization to this company, select the Create new company option, and specify a name for the new company.
    - If you want to re-assign the organization to an existing company, select the **Select existing company** option, and choose the necessary company from the drop-down list.

For a company to be displayed in the list, it must be created beforehand as described in section Adding Companies.

#### b. Click **Apply**.

Backup	Restore Browse		Admini	strator 🗸 💮 English 🖌 💭
Exit Configurati	n Salesforce Orgs Comp	anies Databases		
Application		Q + Add Salesforce Organization 🧪 Edit Connection	🐶 Rename 🛛 🛱 Chang	e Company 🗙 Delete
<ul> <li>Salesforce</li> </ul>	Salesforce Alias	Company Instance Salesforce E	dition Salesforce	Salesforce ID Databa †
🔹 Users and Roles	Selected: 1 of 4			
Security	Veeam - Homeoffice v2 (p	rc Change Company X	lition maxiivano.v	00D5e000002U lab1_m
😰 Alerts	Veeam - max2 (sandbox)	Specify a new company name or select from existing	max@veea	00D8C0000004f Max2
🧟 License	📃 🔮 Veeam - fsi (sandbox)	Create new company	max@veea	00D740000000M —
🗙 About	📃 🔮 Veeam - partial (sandbox)		max@veea	00D4C000001B —
		JK orgs		
		Company name must be unique		
		Select existing company		
		Select company 🗸 🗸		
		Apply Cancel		

### **Editing Connections**

To authorize connections to Salesforce organizations, Veeam Backup for Salesforce uses the Salesforce Connected App specified either during the initial configuration or on the Connected App tab as described in section Changing Connected App Tokens. When you change the Connected App, connections to all Salesforce organizations added to Veeam Backup for Salesforce must be re-authorized. To do that, you can reconnect to organizations in backup policy settings or edit connection settings for the organizations.

#### IMPORTANT

If you enable enhanced domains in Salesforce, URLs of your Salesforce organizations will change and backup policies will fail to connect to Salesforce. To resolve the issue, edit the connection URL of the Salesforce organization when it is in the failed state. The link to change the URL will appear at the **Connect** step of the **Edit Salesforce organization** wizard.

For more information on enhanced domains, see Salesforce Documentation.

To edit connection settings for a Salesforce organization, do the following:

- 1. Switch to the **Configuration** page.
- 2. Navigate to Salesforce > Salesforce Orgs.
- 3. Select the necessary organization and click **Edit Connection**.

The Edit Salesforce organization wizard will open.

- 4. At the **Connect** step of the wizard:
  - a. To re-authorize connection to the organization, click **Re-authorize connection**. You will be redirected to the Salesforce authentication webpage.

On the Salesforce authentication webpage, enter credentials of the Salesforce user and click **Log in**. The specified user must be assigned permissions required for Veeam Backup for Salesforce to be able to perform backup and restore operations. For information, see Required Permissions.

#### NOTE

Veeam Backup for Salesforce does not store credentials of the Salesforce user used to log in to Salesforce. To authorize in Salesforce and access Salesforce data, Veeam Backup for Salesforce uses the Connected App.

b. [This step applies only if you have enabled enhanced domains in Salesforce] To edit the connection URL of the Salesforce organization, click **Edit organization URL**, provide the new URL in the **Edit organization URL** window and click **Apply**.

c. To verify whether permissions assigned to the specified user are enough to perform backup and restore operations, click the link in the **Verify permissions** section and wait for the check to complete.

Backup Res	tore	Administrator 🗸	English	~   ( <u>)</u>
Edit Salesfor	ce organization GVCCorp (production)			
Connect Assign a Company Summary	Log in with Salesforce         Log in with Salesforce to authorize new Salesforce organization connection         Failed to update refresh token, please re-authorize (sara.baker@company.mail)         Image: The second seco			
	Next Save Cancel			

- 5. At the **Assign a Company** step of the wizard, choose whether you want to re-assign the organization to another company:
  - If you want to add a new company to Veeam Backup for Salesforce and to re-assign the organization to this company, select the **Create new company** option, and specify a name for the new company.
  - If you want to re-assign the organization to an existing company, select the **Choose existing company** option, and choose the necessary company from the drop-down list.

For a company to be displayed in the list, it must be created beforehand as described in section Adding Companies.

Backup Res	tore Browse
Edit Salesfo	rce organization Veeam (production)
Connect	Assign the Salesforce organization to a Company
Assign a Company	A company is a logical group that provides an additional level of security by controlling the scope of data available to the user and the alerts shown.
Summary	Create new company  LA Company Company name should be unique  Choose existing company Veeam  Veeam V
	Previous Next La Save Cancel

6. At the **Summary** step of the wizard, review configured settings and click **Save**.

Backup Res			Administrator 🗸		•				
Edit Salesforce organization Veeam (production)									
Connect	Review settings								
Assign a Company	Company:	LA Company							
Summary	User: Instance type:	maxi.v2@gmail.com Production							
	Edition: Salesforce Org ID: URL: Storage:	Developer Edition 00D5e00002UMGQEA4 https://homeoffice22-dev-ed.my.salesforce.com /opt/vbsf/data/00e9f33e581919f7fc5b63a5243032b1140b12a84514ff2c56c8d918ae42ed03							
		Previous Save Lin, Cancel							

### **Removing Organizations**

You can remove Salesforce organizations from the configuration database.

#### IMPORTANT

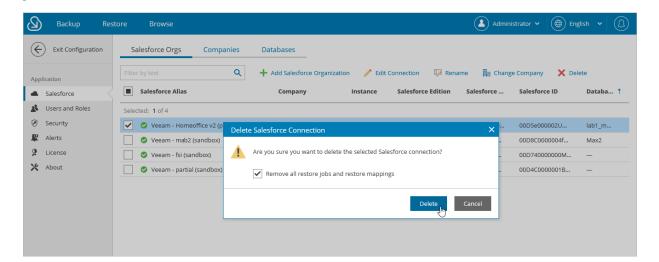
You cannot remove a Salesforce organization that is currently protected by a backup policy. To remove the organization, delete the backup policy first as described in section Removing Backup Policies.

To remove an organization, do the following:

- 1. Switch to the **Configuration** page.
- 2. Navigate to Salesforce > Salesforce Orgs.
- 3. Select the necessary organization and click Delete.
- 4. In the **Delete Salesforce Connection** window, select the **Remove all restore jobs and restore mappings** check box and click **Delete**.

#### NOTE

When you remove an organization, the backed-up data (data, metadata, files and attachments) is not deleted automatically. Veeam Backup for Salesforce continues storing the data for the security reasons. You can further use this data to restore objects and fields if you add the organization back to the management server. If you do not need the backed-up data, you can manually delete a database used to store the data of this organization from the server where the database is hosted and delete files and attachments from the location specified in the backup policy protecting the organization.



# Managing Companies

Companies are logical groups that provide an additional level of security by controlling the scope of data available to the user and the alerts shown. Using companies, you can group Salesforce organizations added to Veeam Backup for Salesforce and give users granular access only to organizations that belong to a specific company. For more information, see Adding Users.

A company is created automatically when you connect to a Salesforce organization during the initial configuration of the management server. You can also add companies manually, edit created companies, reassign company organizations and remove companies.

#### TIP

To track the disk space used by backed-up files of a Salesforce organization, check the **Local Storage Size** column on the **Companies** tab. To track the disk space used by the backed-up database of the Salesforce organization, check the **Database Size** column on the **Companies** tab.

### **Adding Companies**

To add a new company, do the following:

- 1. Switch to the **Configuration** page.
- 2. Navigate to Salesforce > Companies.
- 3. Click Add Company.
- 4. In the **Create Company** window, specify a name of a new company and click **Create**.

Backup Res	store Browse			Administrator • English •
Exit Configuration	Salesforce Orgs Compani	es Databases		
Application	+ Add Company 🕼 Rename Com	pany 🗙 Delete		
<ul> <li>Salesforce</li> </ul>	Company ↓	s	alesforce Orgs	Local Storage Size
🔹 Users and Roles	Veeam		2	8.49 MB
Security	Prod company	Create Company X	0	0 Bytes
Rerts	(P)RND	Company name	7	1.07 TB
License	My & Provider Company	New Company	1	0 Bytes
🗙 About	Provider	Company name should be unique	2	47.46 GB
	AB_test		1	11.7 MB
		Create Cancel		

# **Editing Companies**

For each company added to Veeam Backup for Salesforce, you can change the displayed name:

- 1. Switch to the **Configuration** page.
- 2. Navigate to **Salesforce** > **Companies**.
- 3. Select the necessary company and click Rename Company.
- 4. In the **Rename Company** window, specify a new name for the company and click **Save**.

ß	Backup Res	store Browse			Administrator 🗸	English 🖌 💭				
$\langle$	Exit Configuration	Salesforce Orgs Companies	Databases							
Арр	lication	🕂 Add Company 🛛 🐺 Rename Compan	y 🗙 Delete							
-	Salesforce	Company \downarrow		Salesforce Orgs	Local Storage Size					
24	Users and Roles	Veeam		2		8.49 MB				
۲	Security	Prod company		0		0 Bytes				
R	Alerts	(P)RND	Rename Company	× 7		1.07 TB				
9	License	My & Provider Company	Company name	1		0 Bytes				
Х	About	Provider	Mars	2		47.46 GB				
		AB_test	Company name should be unique	1		11.7 MB				
			Save Cancel							

## **Removing Companies**

You can remove companies from the configuration database. When you remove a company, Veeam Backup for Salesforce verifies whether you have assigned any Salesforce organizations to this company, and if yes, suggests you to re-assign the organizations to another company.

#### IMPORTANT

When you remove a company and re-assign organizations to another company:

- Users that have company-wide permissions to the new company will automatically get permissions to access data of all re-assigned Salesforce organizations.
- Users that have permissions to access the removed company or any Salesforce organizations belonging to this company and do not have permissions to access the new company will not be assigned permissions to access new company automatically.
- Users that have the same roles in the removed and the new companies with permissions to access specific organizations within the company will retain the permissions to the same organizations.

Consider the following example: *User\_1* has the *Restore operator* role for *organization\_1* that belongs to *company\_1* and the **Restore operator** role for *organization\_2* that belongs to *company\_2*. You remove *company\_1* and re-assign *organization\_1* to *company\_2*. In this case, *user\_1* will retain his permissions of the *Restore operator* role to *organization\_1* and *organization\_2* in *company\_2*.

To remove a company, do the following:

- 1. Switch to the **Configuration** page.
- 2. Navigate to Salesforce > Companies
- 3. Select the necessary company and click **Delete**.
- 4. [Applies if any Salesforce organizations are assigned to the selected company] In the **Delete Company** window:
  - a. Choose whether you want to assign the organizations to an existing or to a new company:
    - If you want to re-assign organizations belonging to the removed company to an existing company, select the Assign to existing company option, and choose the necessary company from the drop-down list.

For a company to be displayed in the list, it must be created beforehand as described in section Adding Companies.

If you want to add a new company to Veeam Backup for Salesforce and to re-assign
organizations to this company, select the Assign to a new company option, and specify a name
for the new company.

#### b. Click Assign and Delete.

Backup Re	store Browse		Administrator 🗸 🌐 English 🖌 💭
Exit Configuration		ompanies Databases	
Application	🕂 Add Company 🛛 🐺 Rena	me Company 🗙 Delete	
Salesforce	Company ↓	Salesforce Orgs	Local Storage Size
🔹 Users and Roles	Veeam	Delete Company X	8.49 MB
Security	Prod company	This company is not empty. Please choose where the related Salesforce organizations need to be reassigned.	0 Bytes
Lerts	(P)RND	7	1.07 TB
🙎 License	My & Provider Company	Assign to existing company	0 Bytes
🗙 About	Provider	Veeam Yea	47.46 GB
	AB_test	Assign to a new company	11.7 MB
		Olivia and Co. Company name should be unique Assign and Delete	

# Managing Databases

To store backed-up data and metadata of Salesforce organizations, Veeam Backup for Salesforce uses PostgreSQL databases. One database can be used to protect only one organization. You can add databases to Veeam Backup for Salesforce before or during the creation of backup policies.

### In This Section

- Adding Databases
- Editing Databases
- Removing Databases

### Adding Databases

When you create a backup policy, you can add a new database without closing the Add Backup Policy wizard or connect to a database that has been added to Veeam Backup for Salesforce beforehand as described in this section.

To add a PostgreSQL database to Veeam Backup for Salesforce, do the following:

- 1. Switch to the **Configuration** page.
- 2. Navigate to **Salesforce** > **Databases**.
- 3. Click Add Database.

The Add Database Connection window will open.

4. In the **PostgreSQL Server Connection** section of the window, choose whether the database will be hosted on one of the PostgreSQL servers to which Veeam Backup for Salesforce is already connected or establish connection to a new PostgreSQL server.

If you chose to connect to a new server, you must configure the new connection settings:

- a. In the **PostgreSQL address** field, specify the DNS name or IP address of a PostgreSQL server that will host the database.
- b. In the **Port** field, choose a network port that will be used by Veeam Backup for Salesforce to connect to the PostgreSQL server. The default port number is 5432.
- c. Use the **Username** and **Password** fields to provide credentials of the PostgreSQL user that will be used to access the databases. The user must be assigned permissions required to create database schemas.

Note that if you want Veeam Backup for Salesforce to be able to create the required databases automatically, the user must also be assigned permissions required to create databases. Otherwise, you have to create empty databases on the specified server manually beforehand. For more information, see Permissions.

5. In the **Create or connect to a database** section of the window, use the **Database name** and **Connection label** fields to specify a name for the database and a connection label that further will be used as the database name displayed in the Veeam Backup for Salesforce Web UI.

#### IMPORTANT

Backed-up data of a Salesforce organization can be stored either in an empty database, or in any other database whose schema and organization ID match the schema and organization ID of the source database.

- 6. In the **Select company** section of the window, choose a company that manages a Salesforce organization whose backed-up data and metadata you want to store in this database. For more information on companies, see Managing Companies.
- 7. Click Add.

ຝ	) Backup Res	tore Browse				🔺 Administrator 🗸	🕀 English 🗸	
Æ	-) Exit Configuration	Salesforce Orgs	Add Database Connect	ion	×			
	olication	🕂 Add Database 🏼 🖉	PostgreSQL Server Connection				Configuration D	atabase
	Salesforce	Connection Label 🕇	O Use existing	pgsql-vbsf-bb-02.pgsql-vbsf-b.dev.prg.esx.cis.local:	. ~	Salesforce Alias	Company	000
1	Users and Roles	ab_200_dev30	New server connection	n		ab_dev30	AB_test	
Ð	Security	ab_test_1	$\bigcirc$			-	AB_test	
R	Alerts	🔮 ar	PostgreSQL address:	node.pgsql-vbsf-b.dev.prg.esx.cis.local		(P)RND - ar (sandbox) - te	(P)RND	
9	License	📀 maxab3	Port:	5432		(P)RND - org01 (production)	(P)RND	
×	About	📀 maxab_org01	Username:	dbadmin		(P)RND - org01 (production)	(P)RND	
		mabsandbox	osername.	Password:		Veeam - max (sandbox)	Veeam	
		🔮 partial	Password:			partial (sandbox)	Max	
		opreprod	Create or connect to a dat	abase		(P)RND - preprod (sandbox)	(P)RND	
		🛇 rnd_prod				(P)RND - Veeam RND1 (pr	(P)RND	
		🔮 test_p_db	Database name: olivia_	dtbs		Veeam - Veeam (producti	Veeam	
		Stest_tigrod_999	Connection label: olivia_	dtbs	(P)RND - org01 (production)	(P)RND		
			Select company					
			Company Veeam		~			
			Company Vecan		-			
				Add	ancel			

### **Editing Database Connections**

For each PostgreSQL database added to Veeam Backup for Salesforce you can edit the connection settings:

- 1. Switch to the **Configuration** page.
- 2. Navigate to **Salesforce** > **Databases**.
- 3. Select the necessary database from the list and click Edit Connection.
- 4. In the **Edit Database Connection** window, you can change the connection label used as the database name displayed in the Veeam Backup for Salesforce Web UI, the server address, the network port and the database user. If you change credentials of the user, keep in mind that the new user must be assigned permissions required to create database schemas.

#### NOTE

You cannot edit connection settings for the Veeam Backup for Salesforce configuration database, but you can change user credentials used to connect to this database. To do that, click **Configuration Database** and provide new credentials in the **Edit Database Connection** window.

ß	Backup Res	tore Browse				Administrator 🗸 🌔	🕀 English 🖌
$\langle$	Exit Configuration	Salesforce Orgs Co	ompanies Dat	tabases			
Арг	lication	🕂 Add Database 🛛 💉 Edit C	Connection 🗙 Re	emove			Configuration Database
	Salesforce	Connection Label ↑	Edit Database C	onnection	×	Salesforce Alias	Company 🚥
*	Users and Roles	ab_200_dev30	PostgreSQL Serve	er Connection		ab_dev30	AB_test
Ø	Security	ab_test_1	Connection label:	ar		-	AB_test
L6	Alerts	🥑 ar	Server address:	node.vbsf-b.dev.prg.esx.cis.local		(P)RND - ar (sandbox) - te	(P)RND
9	License	📀 mdev30				(P)RND - org01 (production)	(P)RND
Х	About	mdev3_org01	Port:	5432		(P)RND - org01 (production)	(P)RND
		mxxsandbox	Database:	ar		Veeam - max (sandbox)	Veeam
		🥑 partial	User credentials			partial (sandbox)	Max
		preprod				(P)RND - preprod (sandbox)	(P)RND
		rnd_prod	Username:	andy		(P)RND - Veeam RND1 (pr	(P)RND
		✓ test_p_db	Password:	•••••		Veeam - Veeam (producti	Veeam
		test_tigrdb_999				(P)RND - org01 (production)	(P)RND
				Save	Cancel		

### **Removing Databases**

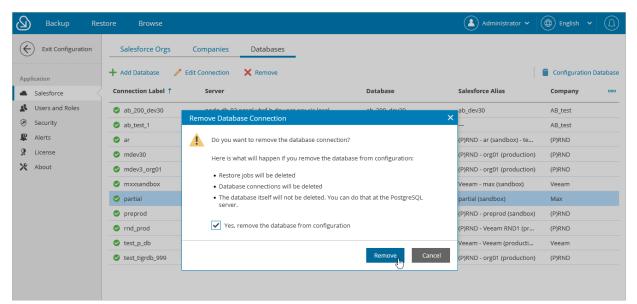
You can permanently remove a database from Veeam Backup for Salesforce if you no longer need it. However, the removed database will not be deleted from the host server — it can be further reconnected to the same or to another Veeam Backup for Salesforce server and used to protect the same organization. If you do not need the data stored in the database anymore, you can delete it from the host server manually.

#### NOTE

You cannot remove a database that is currently used by Veeam Backup for Salesforce to protect a Salesforce organization. If you want to remove the database, connect to another database in the backup policy settings.

To remove a database from Veeam Backup for Salesforce, do the following:

- 1. Switch to the **Configuration** page.
- 2. Navigate to **Salesforce** > **Databases**.
- 3. Select the necessary database and click Remove.
- 4. In the **Remove Database Connection** window, acknowledge the operation and click **Remove**.



# Managing Users

Veeam Backup for Salesforce can be fully managed by a single built-in administrator account created during initial configuration. If you want to provision more users and leverage the role-based access, you can do that by connecting to an identity provider (IdP).

### In This Section

- User Roles and Permissions
- Adding Users
- Editing Users
- Removing Users

### User Roles and Permissions

Veeam Backup for Salesforce controls access to its functionality with the help of user roles and scopes. A role defines what operations users can perform and a scope defines to which companies and Salesforce organizations the permissions apply.

There are 4 user roles that you can assign to user groups and users working with Veeam Backup for Salesforce:

- Administrator can perform all configuration actions, backup and restore operations. This role gives a user access to the full product functionality (except for the IdP configuration).
- **Backup operator** can create and manage backup policies, manage the protected data and perform all restore operations. You can limit access to companies and Salesforce organizations for users when assigning this role. For more information, see Adding Users.
- **Restore operator** can only perform restore operations. You can limit access to companies and Salesforce organizations for users when assigning this role. For more information, see Adding Users.
- Viewer can monitor backup and restore processes without performing any operations. You can limit access to companies and Salesforce organizations for users when assigning this role. For more information, see Adding Users.

The following table describes the functionality available to users with different roles in the Veeam Backup for Salesforce UI. Note that users with Backup Operator, Restore Operator and Viewer roles assigned will have the described permissions only within the scope specified when adding these users.

Tab	Functionality	Administrator	Backup Operator	Restore Operator	Viewer	
Backup	Managing backup policies, performing backup	Full	Full	Viewing backup policies, backup sessions	Viewing backup policies, backup sessions	
	Downloading backup session logs	Full	Full	-	-	
Restore	Managing restore jobs, performing restore	Full	Full	Full	Viewing restore jobs and sessions	
	Downloading restore session logs	Full	Full	Full	-	
Browse Viewing backed-up data, performing restore		Full	Full	Full	-	
Configuration						
Salesforce	Managing companies	Full	-	-	-	

Tab	Functionality	Administrator	Backup Operator	Restore Operator	Viewer
	Managing Salesforce organizations	Full	Adding and viewing Salesforce organizations	-	-
	Managing databases	Full	Full	-	-
	Managing Connected App	Full	-	-	-
Users and Roles	Managing users	Full	-	-	-
Alerts	Managing notifications	Full	Full	-	-
License	License Managing license		Viewing license information	-	-
About	Downloading product logs	Full	-	-	-
	Configuring advanced settings	Full	-	-	-

# Adding Users

To be able to add users and assign specific roles to them, you must first configure the IdP settings.

To add a user or group of users, do the following:

- 1. Switch to the **Configuration** page.
- 2. Navigate to Users and Roles > Users.
- 3. Click Add User.

You will be redirected to the authorization page of the configured identity provider. If you have not logged in yet, log in to the identity provider portal. After that, you will be redirected to the Veeam Backup for Salesforce page as an authorized user.

#### NOTE

If you connected an Azure AD as an identity provider in Veeam Backup for Salesforce and want to add a group of users, make sure that all users in the group have an email in the connected Azure AD. Otherwise, they will not be able to log in to the product.

- 4. In the Assign Roles window:
  - a. In the User or group section, click the link and select the necessary IdP user or group of users in the Select User or Group window. Click Select.
  - b. From the Role drop-down list, select a user role that will be assigned to the selected user or group of users. For more information on user roles, see User Roles and Permissions. If a user belongs to different groups, the user will inherit the more privileged role from the roles assigned to these groups.
  - c. Use the **Company** and **Organization** drop-down lists to specify the scope of resources to which the selected user or group of users will have access in Veeam Backup for Salesforce.

#### NOTE

You cannot limit the scope of resources for the *Administrator* role. By default, this role provides access to all companies and Salesforce organizations added to Veeam Backup for Salesforce.

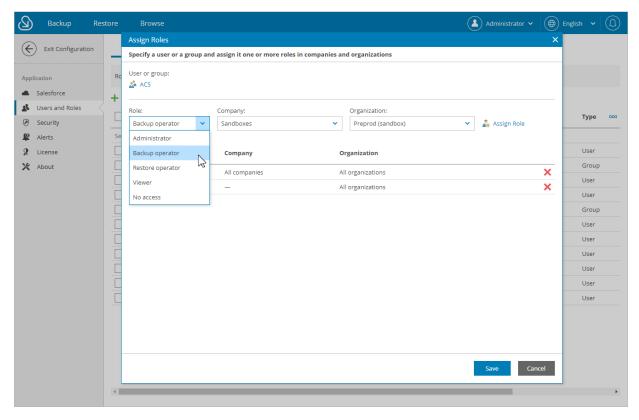
- d. Click Assign Role.
- e. Perform steps b-d for each role that you want to assign to the selected user or group of users.

Make sure that the permissions of the assigned roles do not overlap each other. Otherwise, one role may override another, and Veeam Backup for Salesforce will display a warning.

#### TIP

You can unassign roles from the selected user or group of users. To do that, click the cross button in the necessary row of the user roles table.

#### f. Click Save.



# **Editing Users**

Veeam Backup for Salesforce allows you to edit settings of users added to the configuration database, activate and deactivate users.

#### IMPORTANT

If you change IdP settings, all users added to Veeam Backup for Salesforce using these settings will become inactive. If you want to enable access for these users, choose the previously configured identity provider and save the settings. For more information on configuring an identity provider, see Configuring IdP and SSO Settings.

### Editing Local Administrator

You cannot modify settings of the local administrator created during the initial configuration from the Web UI. You can only reset the password of the administrator using the terminal. To do that, connect to the machine running Veeam Backup for Salesforce using SSH, run the /opt/vbsf/vbsf-backend/reset\_password.sh script, provide and confirm the new password. The password must contain uppercase and lowercase Latin letters and special characters (!@#\$%^&`~\*()\_-=+[]{};'\:\"|,./<>?). The minimum length of the password is 8 characters.

### Editing IdP Users

You can edit permissions assigned to users and user groups in Veeam Backup for Salesforce. To do that:

- 1. Switch to the **Configuration** page.
- 2. Navigate to Users and Roles > Users.
- 3. Select the necessary user or group of users, and click Edit.
- 4. In the Edit User Settings window:
  - a. To unassign a role from the user or group of users, click the cross button in the necessary row of the user roles table.
  - b. To assign a new role to the user or group of users, follow the instructions provided in Adding Users.

The changes will immediately apply after you finish working with the wizard. This will result on user access to the Veeam Backup for Salesforce functionality. However, all backup policies and restore jobs started and scheduled by this user will not be affected.

#### NOTE

If you rename a group of users in Azure Active Directory, Veeam Backup for Salesforce does not automatically update the record in the configuration database. To update the group name in the product Web UI, select the group, click **Edit** and re-save the record.

ß	) Backup F	estor	e Browse					Administrator 🗸		)English 🗸	
G	<u>\</u>		Edit User Settings						×		
$(\epsilon$	-) Exit Configuration		Assign the user to one or mo	re roles in companies and or	ganizations						
	olication Salesforce		User or group: vbsf@veeam.com.ar								
23	Users and Roles	2	Role:	Company:		0	Organization:				
Ì	Security		Administrator 🗸	All companies	~		All organizations	🍰 Assign Role		e	000
12	Alerts										
ğ	License		Role	Company	c	rg	anization				
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										anizations i	
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## **Removing Users**

You can remove Veeam Backup for Salesforce users and user groups from the configuration database:

- 1. Switch to the **Configuration** page.
- 2. Navigate to **Users and Roles** > **Users**.
- 3. Select the necessary user or group and click **Delete**.
- 4. In the **Remove User** window, click **Remove** to acknowledge the operation.

The changes will immediately apply after you click **Remove**. However, all backup policies and restore jobs started and scheduled by this user will not be affected.

Backup Res	store Browse				💄 Administrator 🗸 🛑 Engli	ish • ( <u>(</u>
Exit Configuration	Users					
Application	Role: Administrator	Type to filter users	Q			
<ul> <li>Salesforce</li> </ul>	🕂 Add User 🧪 Edit 🗙 De	elete 🔏 Deactivate				
🔹 Users and Roles 🧹						
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Lerts	Selected: 1 of 6	Remove User		×		
g License	ACS	Mixe Are you sur	re you want to remove the select	ed user?	-	Group
🔀 About	CIS	Admi			-	Group
	<ul> <li>Alex Baker</li> </ul>	Admi	Rem	ove Cancel	10/24/22, 8:37:25 PM	User
	John Nehn	Admi			6/29/22, 4:24:37 PM	User
	Sofia Chi	Administrator	Sofia Chi	sofi.chi@org.com	6/1/22, 4:32:47 PM	User
	Miranda May	Administrator	Miranda May	mmay@org.com	9/30/22, 1:12:14 PM	User

# **Configuring Security Settings**

Veeam Backup for Salesforce allows you to change Salesforce Connected App used to authenticate with Salesforce and get access to resources that will be protected, configure single sign-on (SSO) authentication, and view information on various product events.

## In This Section

- Changing Connected App Tokens
- Configuring IdP and SSO Settings
- Viewing Audit Trail

# Changing Connected App Tokens

Salesforce Connected App allows Veeam Backup for Salesforce to authenticate with Salesforce and get access to resources that will be protected. You can create the Connected App in any Salesforce organization. To learn how to create the Connected App, see this Veeam KB article.

#### IMPORTANT

You can protect multiple Salesforce organizations using a single Veeam Backup for Salesforce installation. However, due to the Salesforce Connected App limit of 5 authorizations per client, authorization issues may occur when you have several product installations leveraging the same Connected App. That is why it is recommended that you create a dedicated Connected App for each product deployment.

For more information on Salesforce OAuth Authorization Flows and Connected Apps, see Salesforce Documentation.

During the initial configuration, you are prompted to provide the Connected App OAuth tokens that are further used by Veeam Backup for Salesforce for the authentication process. However, you can change these tokens later in the Veeam Backup for Salesforce Web UI.

#### IMPORTANT

If you change the Connected App tokens, you must re-authorize all connections to Salesforce organizations added to Veeam Backup for Salesforce. Otherwise, all backup and restore operations will fail.

To re-authorize connections to Salesforce organizations, either navigate to **Configuration** > **Salesforce** > **Salesforce Orgs** and edit connections as described in section Editing Organizations, or navigate to **Backup**, launch the **Edit Backup Policy** wizard for each created backup policy, and follow instructions provided in **Step 2.** Configure Connection to Salesforce Organization.

## Changing Tokens

To change the OAuth tokens, do the following:

- 1. Switch to the **Configuration** page.
- 2. Navigate to Security > Connected App.
- 3. Click **Change Connected App Tokens**, and then click **Proceed** in the **Confirm Operation** window to acknowledge the operation.
- 4. Specify the type of the Salesforce organization where your Connected App is created.
- 5. Use the **Consumer key** and **Consumer secret** fields to provide the tokens obtained when creating the app.
- 6. Click **Connect**.

#### NOTE

If you have created a new Connected App, consider the following:

- The Connected App must be assigned the *Full access (full)* and *Perform requests at any time (refresh\_token, offline\_access)* OAuth scopes. For more information on OAuth scopes in Salesforce, see Salesforce Documentation.
- If you have configured Salesforce as an identity provider in Veeam Backup for Salesforce, the *access unique user identifiers (openid)* OAuth scope must be granted to the new Connected App. Otherwise, you will not be able to change the Connected App tokens.
- The callback URL specified in the Connected App settings must match the Veeam Backup for Salesforce server address. You can copy the address in the **Setting up Salesforce Connected App** section.
- It takes up to 10 minutes for newly created OAuth tokens to become active.

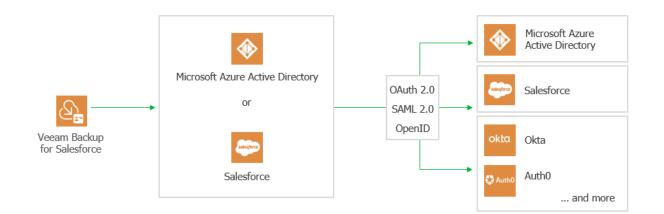
ß	Backup	Restore	e Browse				Administrator 🗸	English	
¢	Exit Configuration	on	Connected App	Single Sign-On	Audit	_			
Appp	lication Salesforce Users and Roles Security Alerts License About		eate a dedicated Connect cure handling of tokens	allows the product to in ted App and save securi and do not share or trar is now configured, but c force tab and re-author lain:	ty tokens in smit token: ponnections ize the conr	n Salesforce using APIs. Salesforce administrator needs to to the product configuration settings. Please ensure s over the internet. to some Salesforce organizations need attention. nected organizations with the backup users credentials.	D		
		W ex Yo	etting up Salesforce hen setting the Connecte tactly match the server a bu can copy and paste th https://node.app-01.vbsf Read KB on Salesforce	ed App in Salesforce, ple ddress. is Callback URL into the : .demo.prg.esx.cis.local		ention to the Callback URL details. Callback URL must			

# Configuring IdP and SSO Settings

Veeam Backup for Salesforce supports single sign-on (SSO) authentication using Azure Active Directory and Salesforce based on the OAuth 2.0 protocol. SSO authentication allows users to follow the corporate security policy and log in to Veeam Backup for Salesforce using the corporate identity provider (IdP).

#### IMPORTANT

If you change IdP settings, all users added to Veeam Backup for Salesforce using these settings will become inactive. If you want to enable access for these users, choose the previously configured identity provider and save the settings.



## Configuring IdP Settings Using Azure Active Directory

To configure IdP settings using Azure Active Directory, you must first create an Azure AD application for Veeam Backup for Salesforce in the Microsoft Azure portal. To learn how to register an application with the Microsoft identity platform, see Microsoft Docs.

When creating the application, consider the following:

- The following API permissions must be granted to the application:
  - o GroupMember.Read.All
  - o User.Read
  - o User.Read.All
- The redirect URI added to the application must match the management server FQDN that you use to access the Veeam Backup for Salesforce Web UI. To make sure that you are adding the correct URI, switch to the **Configuration** page and navigate to **Security** > **Single Sign-On**. The address will be displayed in the **Callback URL** field.

#### Configuring IdP Settings on Veeam Backup for Salesforce Side

To configure the IdP settings on the Veeam Backup for Salesforce side, do the following:

- 1. Switch to the **Configuration** page.
- 2. Navigate to **Security** > **Single Sign-On**.
- 3. Set the **Enable single sign-on** toggle to *On*.
- 4. From the Identity Provider drop-down list, select Azure Active Directory.
- 5. In the **Application ID** field, provide the *Application (client) ID* of the registered Azure AD application. You can find the ID on the app registration **Overview** pane in the Microsoft Azure portal.
- 6. In the **Directory ID** field, specify the *Directory (tenant) ID* of the registered Azure AD application. You can find the ID on the app registration **Overview** pane in the Microsoft Azure portal.
- 7. In the **Client secret** field, enter the value of a client secret created in the specified Azure AD application.

Keep in mind that you can see and copy a client secret value only when creating it. Otherwise, you will not be able to retrieve the value. To learn how to create client secrets, see Microsoft Docs.

8. Click **Save**. You will be redirected to the Microsoft authentication page. Enter the credentials of the Microsoft user and log in to the Azure AD application. Grant admin consent to the application if required. To learn how to do that, see Microsoft Docs.

As soon as the IdP settings are successfully configured, you can start adding users to Veeam Backup for Salesforce. Consider that the Veeam Backup for Salesforce session timeout is 60 minutes. If the session is expired, you must log in to Veeam Backup for Salesforce using the local administrator credentials once again, and continue adding users for the next 60 minutes.

Backup Res	store Browse	🔺 Administrator 🗸	English 🖌 💭
Exit Configuration	Connected App Single Sign-On Audit		
Application	Save Do not forget to save the changes		
<ul> <li>Salesforce</li> <li>Users and Roles</li> </ul>	Enable single sign-on On I		
Security	Azure Active Directory		
Alerts	Application ID: 730e4138-6fd2-hh4f-b32e-5a87f56b13788		
X About	Directory ID:		
	48948fde5-4bk8-4f24-b3f0-ckk12776askh		
	Client secret:		
	PWI*************		
	Callback URL: https://node.app-01.vbsf.demo.esx.cis.local		
	- Verify		

## Configuring IdP settings using Salesforce

You can configure Salesforce as an OpenID Connect identity provider that will allow users of your Salesforce organizations to log in to Veeam Backup for Salesforce. For more information, see <u>Salesforce Documentation</u>.

To be able to use Salesforce as an identity provider, you must grant the access unique user identifiers (openid) OAuth scope to the Connected App used to authorize access to all Salesforce organizations protected by this Veeam Backup for Salesforce installation. For more information on the Connected App, see Changing Connected App Tokens.

#### NOTE

If you have an allowlist for Connected Apps configured in Salesforce, make sure that the product is included in that list and users are granted access to the Veeam Backup for Salesforce Connected App. For more information, see Salesforce Documentation.

#### Configuring IdP Settings on Veeam Backup for Salesforce Side

To configure the IdP settings on the Veeam Backup for Salesforce side, do the following:

- 1. Switch to the **Configuration** page.
- 2. Navigate to **Security** > **Single Sign-On**.
- 3. Set the Enable single sign-on toggle to On.
- 4. From the **Identity Provider** drop-down list, select *Salesforce*.
- 5. From the Login domain field, choose one of the following:
  - If you want to authorize users of Salesforce production organizations only, select *Production*.
  - If you want to authorize users of Salesforce sandbox organizations only, select *Sandbox*.
  - If you want to authorize users of a specific Salesforce organization hosted on a custom domain, select *Custom*.

If you select the **Custom** option, you must also specify the organization domain name.

6. Click Save. You will be redirected to the Salesforce authentication webpage.

On the Salesforce authentication webpage, enter credentials of the Salesforce user and click **Log in**. The specified user must be granted permissions to read user data.

As soon as the IdP settings are successfully configured, you can start adding users to Veeam Backup for Salesforce. Consider that the Veeam Backup for Salesforce session time out is 60 minutes. If the session is expired, you must log in to Veeam Backup for Salesforce using the local administrator credentials once again, and continue adding users for the next 60 minutes.

#### IMPORTANT

If you enabled a Salesforce organization as an identity provider, do not use the integration user account to sign in to Veeam Backup for Salesforce as it will cause the backup session token to expire after 5 login attempts. Backup jobs will fail with the expired Salesforce token message because the authorization token is revoked by Salesforce. You will have to reauthorize the connection to the Salesforce organization.

Backup Res	store Browse	
Exit Configuration	Connected App Single Sign-On Audit	
Application	Save Do not forget to save the changes	
<ul> <li>Salesforce</li> <li>Users and Roles</li> </ul>	Enable single sign-on On 1	
Security	Identity Provider:	
Lerts	Salesforce V	
<ul> <li>License</li> <li>About</li> </ul>	Login domain: Production (login.salesforce.com)	
	s Verify	

# Viewing Audit Trail

The **Audit** tab displays a trail of all security-sensitive events such as logging in, database creation, connecting to Salesforce organizations, backup and restore operations, and so on. You can use this information for management and monitoring purposes.

To track Veeam Backup for Salesforce events, do the following:

- 1. Switch to the **Configuration** page.
- 2. Navigate to **Security** > **Audit**.

#### NOTE

Dates in the **Event** column are always displayed in the following format: [yyyy-mm-dd].

) Exit Configuration	Connected App	Single Sign-On	Audit		
ication	Event	Q	All Viser IP Q	User Name	Q 🔛 Last 7 days
Salesforce	Date ↓	Туре	Event	User IP	User
Users and Roles	5/24/23, 1:09:24 PM	User	Download system logs [2023-05-23] - [2023-05-24]	172.25.164.23	_
Security	5/24/23, 1:09:03 PM	User	Download system logs [2023-05-17] - [2023-05-24]	172.22.84.9	admin
Alerts	5/12/23, 7:53:26 AM	User	Restore job created: restore-job-126918 [ID: 126918]	172.22.84.9	admin
License	5/12/23, 7:35:32 AM	User	Restore job started: restore-job-126917 [ID: 126917]	172.22.84.9	admin
About	5/12/23, 7:35:28 AM	User	Restore job change: Options. restore-job-126917 [ID: 126917]	172.22.84.9	admin
	5/12/23, 7:35:27 AM	User	Restore job change: Fields. restore-job-126917 [ID: 126917]	172.22.84.9	admin
	5/12/23, 7:35:19 AM	User	Restore job change: Data. restore-job-126917 [ID: 126917]	172.22.84.9	admin
	5/12/23, 7:35:18 AM	User	Restore job updated: restore-job-126917 [ID: 126917]	172.22.84.9	admin
	5/12/23, 7:35:18 AM	User	Restore job created: restore-job-126917 [ID: 126917]	172.22.84.9	admin
	5/12/23, 7:34:27 AM	User	Restore job started: restore-job-126916 [ID: 126916]	172.22.84.9	admin
	5/12/23, 7:34:20 AM	User	Restore job change: Options. restore-job-126916 [ID: 126916]	172.22.84.9	admin
	5/12/23, 7:33:41 AM	User	Restore job change: Files. restore-job-126916 [ID: 126916]	172.22.84.9	admin
	5/12/23, 7:33:33 AM	User	Restore job change: Hierarchy. restore-job-126916 [ID: 126916]	172.22.84.9	admin
	5/12/23, 7:33:33 AM	User	Restore job change: Data. restore-job-126916 [ID: 126916]	172.22.84.9	admin
	5/12/23, 7:33:33 AM	User	Restore job updated: restore-job-126916 [ID: 126916]	172.22.84.9	admin
	5/12/23, 7:33:32 AM	User	Restore job created: restore-job-126916 [ID: 126916]	172.22.84.9	admin

# Managing Alerts

Veeam Backup for Salesforce allows you to create alerts to notify you about important events, state changes and issues. Users assigned the *Administrator* role can manage alerts for all companies and Salesforce organizations in Veeam Backup for Salesforce, while users assigned the *Backup operator* role can manage alerts only for companies and Salesforce organizations within their specified scope of permissions.

#### NOTE

Users with the *Administrator* or the *Backup operator* role can assign types of alerts that users with the *Restore operator* or *Viewer* roles can view.

You can create alerts for the following type of events:

- Backup policy an alert created for this type of event can be triggered by the specified backup session results, for example, you can choose whether you want to receive notifications in case backup policies complete successfully, complete with warnings or complete with errors.
- Restore job an alert created for this type of event can be triggered by the specified restore session results, for example, you can choose whether you want to receive notifications in case restore jobs complete successfully, complete with warnings or complete with errors.
- Database connection an alert created for this type of event can be triggered if the connection to PostgreSQL databases is lost.
- Salesforce connection an alert created for this type of event can be triggered if the connection to Salesforce is lost.
- License an alert created for this type of event can be triggered if the license acquires a specific status after a regular license check performed weekly by Veeam Backup for Salesforce or a license check performed manually by a user. To learn how to perform a license check manually, see Viewing License Information.
- File storage size an alert created for this type of event can be triggered by the disk space usage check. The check is performed daily at 9:00 UTC, the alert will be sent if the specified threshold for the disk used space is breached.

## In This Section

- Configuring Notification Settings
- Creating Alerts
- Editing Alerts

# **Configuring Notification Settings**

To receive notifications on created alerts, you must configure notification settings. You can instruct Veeam Backup for Salesforce to send notifications by email and to specific Slack channels and chats.

## **Configuring Email Settings**

To configure mail server settings, choose whether you want to employ basic or modern authentication for your mail server.

#### Using Basic Authentication

To employ the basic authentication to connect to your mail server:

- 1. Switch to the **Configuration** page.
- 2. Navigate to Alerts > Connection Settings.
- 3. Set the **Email alerts** toggle to *On*.
- 4. From the Connection settings drop-down list, select SMTP server (basic authentication).
- 5. In the **SMTP server** field, specify a DNS name or an IP address of the SMTP server. All email notifications (including test messages) will be sent by this SMTP server.
- 6. In the **Port** field, you can change a communication port for SMTP traffic. The default SMTP port is 25.
- 7. In the **Timeout** field, specify a timeout for the connection attempt to the SMTP server. The default timeout is 1,000 seconds.
- 8. In the **Sender** field, enter an email address of the notification sender. This email address will be displayed in the **From** field of the notifications.
- 9. If your SMTP server requires authentication, select the **Require authentication** check box and specify user credentials in the **Username** and **Password** fields.
- 10. To save the settings, click Save.

#### TIP

Veeam Backup for Salesforce allows you to send a test message to check whether you have configured all settings correctly. To do that, click **Send Test Email** and specify an email address to which the email will be sent.

#### Using Modern Authentication

To employ the modern authentication to connect to the Microsoft 365 server, you must first create an Azure AD application for Veeam Backup for Salesforce in the Microsoft Azure portal. To learn how to register an application, see Microsoft Docs.

When creating the application, consider the following:

- The following API permissions must be granted to the application:
  - o SMTP.Send
  - o Mail.Send

• The redirect URI added to the application must match the management server FQDN that you use to access the Veeam Backup for Salesforce Web UI. To make sure that you are adding the correct URI, switch to the **Configuration** page and navigate to **Security** > **Single Sign-On**. The address will be displayed in the **Callback URL** field.

To configure mail server settings, do the following:

- 1. From the **Connection settings** drop-down list, select *Microsoft 365 (modern authentication)*.
- 2. In the **Application ID** field, provide the Application (client) ID of the registered Azure AD application. You can find the ID on the app registration **Overview** pane in the Microsoft Azure portal.
- 3. In the **Directory ID** field, specify the Directory (tenant) ID of the registered Azure AD application. You can find the ID on the app registration **Overview** pane in the Microsoft Azure portal.
- 4. In the **Client secret** field, enter the value of a client secret created in the specified Azure AD application.

Keep in mind that you can see and copy a *Client Secret* value only when creating it. Otherwise, you will not be able to retrieve the value. To learn how to create client secrets, see <u>Microsoft Docs</u>.

5. To save the settings, click **Save**.

You will be redirected to the Microsoft Azure portal. In the Microsoft Azure portal, navigate to the created Azure AD application page, and grant admin consent to the application. To learn how to do that, see Microsoft Docs.

6. Click Configure Sender Email.

You will be redirected to the Microsoft Azure portal. Sign in using a Microsoft Azure account that will be used by Veeam Backup for Salesforce to send notification alerts. A user must be assigned a Microsoft 365 license to the Exchange Online service, and a mailbox must be created for this user.

#### TIP

Back to the Veeam Backup for Salesforce Web UI, you can send a test message to check whether you have configured all settings correctly. To do that, specify an email address to which the email will be sent in the **Send Test Email** window.

## **Configuring Slack Settings**

To receive alert notifications to specific Slack channels and chats, you must create a Slack app. To learn how to create an app in Slack, see Slack Documentation. Depending on how you want the Slack app to work, the Slack app must be assigned a scope of specific permissions, for example: the chat:write permission scope is required to send messages to chats.

To configure Veeam Backup for Salesforce to send alert notifications to Slack, do the following:

- 1. Switch to the **Configuration** page.
- 2. Navigate to **Alerts** > **Connection Settings**.
- 3. Set the **Slack alerts** toggle to *On*.
- 4. In the **Token** field, provide an access token generated by the created Slack app. The access token can be found on your Slack app management page in the **OAuth & Permissions** sidebar menu.
- 5. To save the settings, click Save.

#### TIP

Veeam Backup for Salesforce allows you to send a test message to check whether you have configured all settings correctly. To do that, click **Send Test Message** and specify the name of a user or a channel to which the message will be sent.

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$\langle \epsilon$	) Exit Configuration	Alerts Connection Settings		
Арр	ication	Save		
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10	Alerts	Microsoft 365 (modern authentication)		
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ж	About	734e4138-6fd2-417f-b32e-5a87f5b13788		
		Directory ID:		
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		Callback URL:		
		https://node.app-01.vbsf.demo.prg.esx.cis.local		
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		vbsf.backup@veeamrdcloudbackupqa3.onmicrosoft.com		
		🖂 Configure Sender Email		
		Slack alerts: On		
		Server address:		
		https://slack.com/		
		Token:		
		🙀 Send Test Message		

# **Creating Alerts**

To create an alert:

- 1. Switch to the **Configuration** page.
- 2. Navigate to Alerts.
- 3. Click Add. The Add Alert wizard will open.
- 4. At the **Alert Type** step of the wizard, select the type of an event for which you want to create an alert from the **Event** drop-down list, and specify the conditions under which the alert will be sent.
- 5. At the **Recipients** step of the wizard, specify notification settings for the alert:
  - a. Specify the recipients of the alert notifications:
    - In the Roles section, you can choose user roles that must be assigned to users or user groups to receive notifications. In this case, the notifications will be sent in the Veeam Backup for Salesforce Web UI and by email to all users assigned these roles within their permission scopes. To the groups of users, notifications will be sent only in the Web UI. For a user group to receive notifications by email, a group email address must be added to the user group settings in Azure Active Directory.
    - In the Custom recipients section, you can specify names of Slack channels, users and additional email addresses. In this case, the notifications will be sent to these recipients by email and in Slack. Use a semicolon and a space character to separate multiple recipient addresses.

Addresses of the email recipients must be specified in the following format: *email@domain.com*; addresses of the Slack recipients can be specified in the following formats: *@username*, *#channelname*, *@userid*, *channelid*.

#### NOTE

To receive email and Slack notifications, the notifications settings must be properly configured as described in section Configuring Notification Settings.

- b. In the **Subject** field, specify a subject for notifications. You can use runtime variables listed in section Alert Variables.
- c. In the **Threshold** field, specify the number of events that must occur before the notification is sent. Consider the following example: the threshold is set to 5, the notification will be sent only when the 6 event occurs.
- 6. [This step applies only if you have selected the *Backup policy* or *Restore job* type of the alert] At the **Scope** step of the wizard, choose companies and Salesforce organizations to which the alert conditions will apply.
- 7. Click Finish.

## Alert Variables

When you specify a subject for notifications, you can use the following runtime variables:

- *[%job\_name%]* the backup policy or restore job name.
- *[%job\_status%]* the backup policy or restore job status.
- *[%job\_type%]* the type of a job.
- [%company\_name%] the company name.
- [%salesforce\_name%] the name of a Salesforce organization with which the connection was lost.
- *[%api\_usage%]* number of API requests sent.
- [%deleted%] number of records that were removed from Salesforce.
- [%failed%] number of records that were failed to process.
- [%changed%] number of records that were updated.
- [%inserted%] number of records that were added to a database.

# **Editing Alerts**

You can edit, enable, disable and remove the created alerts:

- 1. Switch to the **Configuration** page.
- 2. Navigate to Alerts.
- 3. Select the necessary alert from the list and do one of the following:
  - To edit the alert settings, click **Edit** and complete the wizard as described in section Creating Alerts.
  - To disable the enabled alert, click **Disable**.
  - To enable the disabled alert, click **Enable**.
  - To remove the alert, click **Delete**.

# **Configuring Advanced Settings**

You can view and modify system limits and default settings configured in Veeam Backup for Salesforce. To do that, switch to the **Configuration** page, navigate to **About** > **Advanced Settings** and click **Confirm**. From the drop-down list, choose whether you want to view the restore or backend advanced settings. Note that only an Administrator can update the advanced settings.

#### IMPORTANT

Changing the default advanced settings may result in unsupported or unusable product configuration. Do not change the settings unless it is advised in this document or by the Veeam Customer Support Team. If you change a setting accidentally, select this setting and click **Reset to Default**.

The **Backend** list shows general settings of the management server and key settings that Veeam Backup for Salesforce uses for backup operations:

- sf.api.version Salesforce API version of the Veeam backup and backend services.
- restore.job.draft.lifetime.days the period of time (in days) during which the product keeps restore job drafts in the configuration database. If you set this parameter value to *O*, the product will keep job drafts for 1 day only.
- restore.job.allow.parallel defines whether the product runs parallel restore jobs for the same organization.
- logging.restore.file.retention the period of time (in days) during which the product keeps restore logs in the configuration database and log storage folder.
- logging.backup.file.retention the period of time (in days) during which the product keeps backup logs in the configuration database and log storage folder.
- logging.backend.file.retention the period of time (in days) during which the product keeps configuration logs in the log storage folder.
- logging.add.domain.filename defines whether the product adds the backend domain name to the name of the downloaded log archive file.
- data.storage.location the path to the folder where the product stores backups of Salesforce files and metadata. By default, the product stores backups in the /opt/vbsf/data folder. If you change this parameter value, you must move all your backups to a new location manually before enabling backup policies. Note that each Salesforce organization has its unique subfolder containing the organization ID that cannot be modified.
- backup.metadata.xmx the maximum amount of memory allocated to the Java Virtual Machine (JVM) used by the backup service to process metadata.
- backup.metadata.xms the initial amount of memory allocated to the JVM used by the backup service to process metadata.
- backup.metadata.retrieve.batchsize the number of metadata files retrieved in one request (batch) to Salesforce during a backup session. If you set this parameter value to *O*, the number of requests sent to Salesforce will depend on the amount of processed data.
- backup.file.xmx the maximum amount of memory allocated to the JVM used by the backup service to process files and attachments.
- backup.file.xms the initial amount of memory allocated to the JVM used by the backup service to process files and attachments.

- backup.file.max.failure the maximum number of failed attempts to back up a file before the file is excluded from the backup policy. If you set this parameter value to *O*, the file will not be excluded from the backup policy regardless of the number of failed attempts.
- backup.data.xmx the maximum amount of memory allocated to the JVM used by the backup service to process Salesforce data. It is recommended that you add 256 MB of memory for each 1 TB of storage resources used by your organization.
- backup.data.xms the initial amount of memory allocated to the JVM used by the backup service to process Salesforce data.
- backend.object.limit.rows the maximum number of backed-up records retrieved from the product database that are displayed on the Browse tab. The minimum value is 1; the maximum value is 50,000.
- backend.metadata.download.files the maximum number of metadata files that you can download at a time to the local machine during a restore operation. The minimum value is 1; the maximum value is 500.
- backend.domain the FQDN or IP address of the management server. Keep in mind that this parameter value match the callback URL in the Connected App settings in Salesforce and redirect URI in Microsoft Azure.

The **Restore** list shows key settings that Veeam Backup for Salesforce uses for restore operations:

- suppress.sf.unknown.fields defines whether the product ignores fields that are present in backed-up databases but missing in the Salesforce database while running restore jobs. If you set this parameter value to true, the product will proceed with the restore process regardless of the missing fields. If you set this parameter value to false, the product will stop a restore job as soon as a missing field is discovered.
- sf.composite.batch.size the number of records the product sends to Salesforce in one request (batch) during a restore session.
- sf.bulk.records.threshold the maximum number of records before the product switches to Bulk API 2.0.
- sf.bulk.batch.size the number of records the product sends to Salesforce in one request (batch)
  during a restore session. The product switches to this setting when the sf.bulk.records.threshold
  value is reached.
- sf.api.version the Salesforce API version of the Veeam restore service.
- min.free.memory.size.percents the minimum amount of free memory (in percentage) of the management server required to start a restore session.
- log.obfuscation.level the level of masking sensitive data in restore logs.
- hierarchy.restore.on.max.input.records the number of records that can be selected for one restore session (if hierarchy restore is enabled).
- hierarchy.restore.off.max.input.records the number of records that can be selected for one restore session (if hierarchy restore is disabled).
- hierarchy.restore.default.depth the maximum level to which child records are automatically restored. This setting is applied only to those records that have not been reviewed when configuring child hierarchy for restore. By default, this parameter is set to 2, that is, the product restores records that you selected at step 4 of the **Restore Records** wizard and the 1st level of child records.
- hierarchy.max.parents.depth the default value of the Restore parent hierarchy parameter that is specified when configuring hierarchy advanced settings.

- fields.restore.max.input.records the number of records that can be selected for one field value restore session.
- backend.url the FQDN or IP address of the management server.

# Performing Salesforce Backup

Only users assigned the Administrator or Backup operator roles can perform backup operations in Veeam Backup for Salesforce. Users can perform backup operations within their permission scope — only for companies and organizations to which data they have access.

To perform backup of Salesforce organizations, Veeam Backup for Salesforce runs backup policies. A backup policy is a collection of settings that define the way backup operations are performed: what data to back up, where to store backups, when to start the backup process, and so on. One backup policy can be used to protect one Salesforce organization.

When performing the initial configuration, a user adds a Salesforce organization, and specifies a schedule for the backup policy that will protect this organization and a database that will be used to store backed-up data and metadata. This policy is created automatically by Veeam Backup for Salesforce and has the following preconfigured settings: backup of files and attachments is disabled, restore points created for Salesforce objects are stored for 1 year. You can edit these settings as described in section Editing Backup Policies.

If you want to back up more Salesforce organizations, you can create new backup policies. Each Salesforce organization can be protected by only one backup policy.

## In This Section

- Creating Backup Policies
- Starting and Stopping Backup Policies
- Disabling and Enabling Backup Policies
- Editing Backup Policies
- Removing Backup Policies
- Viewing Backup Policy Details
- Viewing Backed-Up Data

# **Creating Backup Policies**

When you create a new backup policy to protect a Salesforce organization, you can instruct Veeam Backup for Salesforce:

- To back up Salesforce object data and metadata.
- To back up files and attachments associated with the Salesforce objects.
- To exclude specific objects and fields from the backup scope.
- To automatically protect new objects and fields.
- To apply different schedules used to launch backup sessions for different groups of objects.
- To remove the backed-up data according to the specified retention settings.

To create a backup policy, complete the following steps:

- 1. Launch the Add Backup Policy wizard.
- 2. Configure connection to a Salesforce organization.
- 3. Configure policy schedule and backup options.
- 4. Enable backup of files and attachments.
- 5. Configure retention settings.
- 6. Finish working with the wizard.

# Step 1. Launch Add Backup Policy Wizard

To launch the Add Backup Policy wizard, do the following:

- 1. Navigate to the **Backup** tab.
- 2. Click Add.

#### NOTE

If you have added multiple companies to Veeam Backup for Salesforce, before you launch the **Add Backup Policy** wizard, select the company to which a Salesforce organization that you want to protect belongs from the company drop-down list at the top of the page.

For a company to be displayed in the list, it must be added to Veeam Backup for Salesforce beforehand as described in section Adding Companies, and the user must have permissions to access the company. For more information on user permissions, see User Roles and Permissions.

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- Add / Edit	🗙 Delete 🛛 🕨 Run 🔳 Stop	🖒 Enable 🧃	View Details				
Policy Name	Salesforce Alias	Status	Schedule	Salesforce User	Created Date $\downarrow$	Last Run Date	000
backup-policy-836255	(P)RND - Prod	Success	U Hourly	vbsf_rnd@company	8/18/22, 10:48:51 AM	8/29/22, 10:00:17 AM	
backup-policy-836251	(P)RND - partial (sandbox)	😢 Failed	ථ Hourly	vbsf@company.com	8/16/22, 6:15:23 PM	8/29/22, 10:00:16 AM	
backup-policy-828901	(P)RND - preprod (sandbox)	× Aborted	U Hourly	max@company.com	8/10/22, 11:08:09 AM	8/29/22, 10:00:15 AM	

# Step 2. Configure Connection to Salesforce Organization

At the **Connection** step of the wizard, connect to a Salesforce organization and specify a database that will be used to store backed-up data:

- 1. In the Log in with Salesforce account section:
  - a. Choose a Salesforce organization that you want to protect. You can choose an organization that is already connected to Veeam Backup for Salesforce or connect to a new organization. For an organization to be displayed in the list, it must not be protected by any other backup policy on this management server.

If you choose an already connected organization, make sure that this organization belongs to the company selected at step 1. If the organization belongs to a different company, choose the company to which this organization belongs or change the company of the selected organization as described in section Editing Connections.

To connect to a new organization, do the following:

- i. Choose whether you want to use a Salesforce organization hosted on a production instance, sandbox instance or custom domain. If you select the **Custom domain** option, you must also specify the organization domain name.
- ii. Click Log in with Salesforce account. You will be redirected to the Salesforce authentication webpage.
- iii. On the Salesforce authentication webpage, enter credentials of a Salesforce user of the organization that you want to protect, and click **Log in**.

The specified Salesforce user must be assigned permissions required for Veeam Backup for Salesforce to be able to perform backup and restore operations. For information, see Required Permissions.

#### NOTE

Veeam Backup for Salesforce does not store Salesforce user credentials used to log in to Salesforce. To authorize in Salesforce and access Salesforce data, Veeam Backup for Salesforce uses the Connected App specified during the initial configuration. You can change the Connected App as described in section Changing Connected App Tokens, but keep in mind that after changing the Connected App, you will have to re-authorize all connections to Salesforce organizations added to Veeam Backup for Salesforce.

2. Back to the **Add Backup Policy** wizard, check whether any errors occurred during the authentication process and do the following:

#### IMPORTANT

If an error occurs, check whether the Salesforce organization whose user you used to log in to Salesforce is not protected by another backup policy configured on this management server.

a. In the **Verify permissions** section, you can verify whether the permissions assigned to the specified user are enough to perform backup and restore operations. To do that, click **Verify permissions** and wait for the check to complete.

b. In the **Connect to a database** section, choose a database that will be used to protect the specified Salesforce organization. To do that, click **Select a database**. The **Database connection** window will open.

You can add a new database or select a database that has already been added to Veeam Backup for Salesforce:

- To add a database without closing the Add Backup Policy wizard, click New Database Connection and specify connection settings in the Add Database Connection window as described in section Adding Databases.
- To specify an already added database, select the database from the list. For a database to be displayed in the list, it must be created beforehand as described in section Adding Databases. You cannot choose a database that is used to protect any other Salesforce organization as one database can be used to protect one organization only.

You can either connect to an empty database or a database with the same schema as the source database. In latter case, the organization IDs of the both databases must be the same.

#### NOTE

When connecting to a database, consider the following:

- You can either connect to an empty database or a database with the same schema as the source database. In latter case, the organization IDs of the both databases must be the same.
- You can connect only to a database that belongs to the company that you selected at step 1.

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Connection	Salesforce and Da					×
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		Port: 54	32		dbhost.local	
Summary	Verify permissions	Username: vt			dbhost.local	
	Verify basic user permi	Username. V	51		dbhost.local	
	Verification comp	Password:			dDhost.local	
	Connect to a databa:	Create or connect to a datab	ase			
	Each Salesforce organ	Database name: config_ne	N			
	dbhost.local / lab	Connection label: dept01				
				Add Cancel		
			Apply Cancel			

# Step 3. Configure Backup Settings

At the **Backup** step of the wizard, specify schedules according to which Veeam Backup for Salesforce will launch policy sessions, exclude objects and fields from the backup scope, automatically add new objects and fields to the policy, and limit API calls sent by Veeam Backup for Salesforce to Salesforce:

- 1. Configure schedules for the backup policy.
- 2. Configure additional backup options.

## Step 3.1 Configure Backup Schedules

In the **Backup schedule** section of the **Backup** step of the wizard, configure the default and custom schedules for the backup policy.

Veeam Backup for Salesforce has 3 built-in schedules:

- Hourly this schedule launches a backup policy session at the beginning of every hour.
- Daily this schedule launches a backup policy session every day at 00:00 UTC.
- Weekly this schedule launches a backup policy session every Sunday at 00:00 UTC.

#### NOTE

You cannot edit or remove the built-in schedules. If none of the built-in schedules meets your business needs, you can create a new schedule. To learn how to create schedules, see Creating Schedules.

## Specifying Default Schedule for Backup Policy

From the **Default schedule for this policy** drop-down list, select the default policy schedule that will be used to back up all data of all objects of the protected organization that have no custom schedules assigned, to back up object metadata, to back up files and attachments if you enable this functionality at step 4, and to back up new objects and fields if you select this option in the Additional backup options section. You can select one of the built-in schedules or create a new one as described in section Creating Schedules.

## Specifying Custom Schedules for Protected Objects

If some objects are updated frequently and need to be backed up more or less often than other objects belonging to the protected Salesforce organization, you can assign custom schedules to these objects. Veeam Backup for Salesforce will launch a distinct backup session to protect each group of objects according to the assigned schedules. It is recommended that you assign the same schedule to the related Salesforce objects to ensure that these objects can be restored properly.

To assign a schedule to an object, do the following:

- 1. Click the link in the **Custom schedules** field.
- 2. In the **Specify schedule per object** window, do the following:
  - a. In the **Object** list, select check boxes next to the objects that must be protected according to a specific schedule.
  - b. Click **Assign schedule**, choose the necessary schedule from the **Schedule** drop-down list in the **Assign schedule** window, and click **Assign**.

#### TIP

By default, Veeam Backup for Salesforce backs up all supported Salesforce objects of the protected organization. However, some Salesforce objects can not be restored, such as history objects. If you do not want to back up these or any other objects of the organization, you can exclude them from the backup policy. To do that, select the **Exclude from backup** option from the **Schedule** drop-down list.

Salesforce objects that are not backed up by Veeam Backup for Salesforce are listed in Appendix A. Unsupported Objects.

c. Click **Apply** to save the changes.

#### NOTE

By design, the user and organization objects are automatically added to every schedule configured for the backup policy. You cannot exclude these objects manually.

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Backup	Backup schedule	targets. Keep in mind, that related objects need to be on th	
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	Automatically add new objects	Tag: Conga Global Merge APXTConga4_Composer_QuickMerge_Tag	Hourly
	Automatically add new fields on objects	Conga Global Merge APXTConga4_Composer_QuickMerge_c	Hourly
	Set API Limits	Tag: Conga Collection Solution APXTConga4_Conga_Collection_Solution_Tag	Hourly
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### Creating Schedules

#### IMPORTANT

If you plan to run multiple backup policies at the same time, it is recommended that you add at least 256 MB of RAM per one backup schedule.

To create a new backup schedule for the policy at the **Backup** step of the wizard, do the following:

- 1. In the Backup schedule section, click Manage Schedules.
- 2. In the Manage Schedules window, click Add New Schedule.
- 3. In the Add New Schedule window, do the following:
  - a. In the **Schedule name** field, specify a name for the schedule. The name must be unique in Veeam Backup for Salesforce.
  - b. In the **Start policy** section, select the schedule type:
    - To run a backup policy once, select **Once at** and specify the time when the backup policy must run.

Note that you cannot combine one-time schedules with periodic schedules when configuring the default schedule and custom schedules for backup policy. If you select the *Once at* type of schedule as the default policy schedule, you must manually remove all periodic schedules configured for Salesforce objects, wait for the policy session to complete, and then re-configure periodic schedules for the policy.

• To run a backup policy periodically, select **Daily** and specify how often you want Veeam Backup for Salesforce to run the policy.

#### NOTE

The configured schedules are stored in the CRON format and used to run policy sessions. If you specify to run a session every 9 hours, Veeam Backup for Salesforce will follow the following schedule (UTC): Mon 00:00, Mon 09:00, Mon 18:00, Tue 00:00 and so on.

- c. [Applies if you have selected the **Daily** option] If you want the backup policy to run only during the specific period of time, select the **Backup window** check box and specify the time interval.
- d. From the **Time zone** drop-down list, select a UTC time offset. By default, the time zone of your browser is selected.
- e. Review the settings and click Add.

The created schedule will be available in all backup policies created for Salesforce organizations within one company. You can further edit or delete these schedules.

#### IMPORTANT

If you delete a schedule that is used to back up any objects in the current or in any other backup policy within the company, Veeam Backup for Salesforce will raise a warning. To eliminate the warning, specify a schedule that will replace the deleted one. Consider that the schedule will be replaced in all backup policies created for this company.

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## Step 3.2 Configure Additional Options

In the **Additional backup options** section of the **Backup** step of the wizard, you can specify data protection settings and limit the API requests.

## Specifying Additional Options

To specify additional data protection options, do the following:

1. To exclude specific object fields from the backup policy, click the link in the **Exclude fields from backup** field.

In the **Exclude fields** window:

- a. From the **Object** list, select an object whose fields you want to exclude.
- b. From the Fields list, select the necessary fields.
- c. Click Add.
- d. Repeat steps a-c for all fields that you want to exclude.
- e. Click **Apply** to save the changes.
- 2. To automatically protect new objects added to the Salesforce organization, select the **Automatically add new objects** check box.
- 3. To automatically protect new object fields, select the Automatically add new fields on objects check box.

#### NOTE

While creating a backup, Veeam Backup for Salesforce can automatically process database schema changes such as adding or removing objects and fields. Keep in mind that if you change a field type in Salesforce, this may result in a backup failure.

## Setting API Request Limits

Salesforce limits the total API requests per 24-hour period for each Salesforce organization. To ensure that Veeam Backup for Salesforce does not conflict with other applications that use API requests for integration with Salesforce, it is strongly recommended that you specify the limits of REST API and BULK API requests that must not be exceeded by Veeam Backup for Salesforce when performing backup and restore operations. For more information on API request limits, see Salesforce Documentation.

To limit API requests sent by Veeam Backup for Salesforce to Salesforce, do the following:

- 1. Click Set API Limits.
- 2. In the **Set API limits** window, specify the maximum limits for the REST API and BULK API requests, and click **Apply**.

#### How API Request Limits Work

After you set the maximum limit of API requests that can be used, Veeam Backup for Salesforce checks the quantity of remaining API requests each time before starting a new policy session. If the specified threshold is breached, the session fails with an error indicating that the API request limit has been exceeded.

If the specified threshold is not reached, then the policy session is started and Veeam Backup for Salesforce checks the quantity of API requests left before starting every new cycle of objects selection. Once the specified threshold is breached, backup of objects remaining in the queue fails with an error indicating that the API request limit has been exceeded. However, backup of objects that are already being processed continues until Salesforce accepts API requests. This may cause Veeam Backup for Salesforce to accidentally exceed the maximum limit of API requests that you specified.

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# Step 4. Enable Backup of Files and Attachments

#### IMPORTANT

This option is available only if you have assigned the *Query All Files* permission to your Salesforce user. For more information, see Permissions.

At the **Files** step of the wizard, to back up Files, Content, Documents and Attachments, do the following:

1. Set the Backup files and attachments toggle to On.

Veeam Backup for Salesforce will display the local directory on the management server that will be used to store the backed-up files in the **Location to store files** field.

#### NOTE

Consider the following:

- Note that for each protected organization, the product automatically creates a subfolder with a unique name containing the organization ID that cannot be modified. Therefore, if you remove a backup policy and then create a new policy for the same organization, Veeam Backup for Salesforce will use the same backup location for this organization.
- It is recommended that you mount additional storage to the specified location to prevent the shortage of storage capacity. When you configure a backup policy, Veeam Backup for Salesforce verifies whether disk space available in the specified directory is enough for the amount of data that will be backed up and raises a warning in case of insufficient storage capacity.
- If you remove the backup policy, data stored in the specified location will not be removed automatically. If you do not need the backed-up files and attachments anymore, you must delete them manually.
- 2. In the File backup options section, select the type of data that you want to back up.

#### IMPORTANT

In Veeam Backup for Salesforce 2.0, you can back up but cannot restore using in-built product functionality the *MobileApplicationDetail* and *MailmergeTemplate* type of content. The restore functionality for these content types will be added in forthcoming versions.

Backup Res	tore Browse
Edit Backup	Policy backup-policy-351
Connection Backup	Backup Files and Attachments Save latest versions of files to a local folder, keep file history and restore files when needed.
Files	Backup files and attachments: O On Location to store files: D /opt/vbsf/data/59a96041c7d109fef91e7db438dd931e218276960b06dac10d6c71ec395b6535
Retention	File backup options
Summary	<ul> <li>✓ Attachment</li> <li>✓ Content Version, Feed Attachment</li> <li>Document</li> <li>Service Report</li> <li>Quote Document</li> <li>✓ Other (Mobile Application Detail, etc)</li> </ul>
	Previous Next Finish Cancel

## Step 5. Configure Retention Settings

At the **Retention** step of the wizard, you can configure retention settings for the backed-up data — a time period during which the restore points will be kept. It allows you to consume less storage space by deleting the restore points that are older than the specified time period. Consider that the time period is calculated since creation of a backup of a Salesforce record, not since creation of the record itself.

To configure retention settings for the backup policy, do the following:

- 1. In the Data and attachments retention policy section:
  - a. In the **Keep versions for** field, specify the number of days (weeks, months, years) for which you want to keep backups of Salesforce objects and attachments.

Note that Veeam Backup for Salesforce will always keep the latest restore point in the backup chain even if the specified retention limit is reached.

b. If you want to configure specific retention settings for different objects protected by the backup policy, click the **Define custom retention policy** link.

In the **Custom Retention Settings** window, click **Add Object**, select the necessary object from the **Object** drop-down list, and specify the retention period. Click **Apply**.

#### IMPORTANT

Attachments associated with objects to which custom retention settings are applied will still be removed according to the main data and attachments retention policy specified in the **Keep versions for** field.

- 2. The settings specified in the **Data and attachments retention policy** section do not apply to backups of Files, Content and Documents created by the policy. If you want Veeam Backup for Salesforce to automatically delete these backups according to the retention policy, you must configure their own retention settings in the **Files, Content, Documents** section:
  - To instruct Veeam Backup for Salesforce to remove backups of files associated with object backups that have been already deleted according to the retention policy, select the **Purge deleted content older than** check box and specify the period after which these files will be removed.

 To instruct Veeam Backup for Salesforce to remove backups of file versions, select the Purge content versions older than check box and specify the period after which the outdated versions will be removed.

Backup Res	tore Browse 🕅 Veeam 🗸 Administrator 🗸 🌐 English 🗸 💭
Add backup	policy
Connection Backup	Retention Policy Salesforce data tends to grow over time. Retention settings will automatically erase historical data and files based on these settings. Data and attachments retention policy
Files	Define main retention schedule.
Retention	Keep versions for: 4
Summary	E Define custom retention policy
	Files, Content, Documents
	Define retention for files, content and content versions.         Image: Purge deleted content older than:         1       Image: Weeks         Image: Purge content versions older than:       2         Image: Weeks       Image: Weeks         Image: Purge content versions older than:       2         Image: Purge content versions older than:       2         Image: Purge content versions older than:       2         Image: Purge content versions older than:       2
	Previous Next Finish Cancel

# Step 6. Finish Working with Wizard

At the **Summary** step of the wizard, review configured settings and click **Finish**.

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Connection	Objects						
Backup Files	Main schedule: Objects count: Excluded objects: Custom schedule:	Weekly 528 1 Hourly					
Retention	Objects:	1					
Summary	Custom schedule: Objects:	Daily 1					
	Automatically add new objects: Automatically add new fields: Exclude fields:	Yes Yes O					
	Files						
	Attachment: Content Version, Feed Attachment: Document: Service Report:	Yes Yes Yes					
		Previous	Finish	Cancel			

# Starting and Stopping Backup Policies

You can start a backup policy manually, for example, if you want to create an additional restore point in the backup chain and do not want to modify the configured backup policy schedules. You can also stop a backup policy if processing of a session is about to take too long, and you do not want the policy to have an impact on the production environment during business hours.

To start or stop a backup policy, do the following:

- 1. Navigate to the **Backup** tab.
- 2. Select the necessary backup policy.

#### NOTE

You can filter backup policies displayed on the **Backup** tab by using the icons in the **Show** field at the top of the list. If you set a filter, the settings apply to all companies and do not change during the current user session. That is why if you do not see the necessary policy in the list, make sure that the **All** filter is set.

3. Click **Run** or **Stop**. Keep in mind that if you run a backup policy, it will automatically launch all backup schedules configured for this policy.

If you stop the running backup policy, in the **Confirm Policy Stop** window, do the following:

- Click **Hard Stop** to immediately stop the backup policy. In this case, Veeam Backup for Salesforce will interrupt the currently running backup session, and the backup policy will acquire the *Aborted* status.
- Click Graceful Stop to complete backup for Salesforce objects that are already being processed by the backup session. Veeam Backup for Salesforce will stop the policy execution when backup of the processed objects is finished, and the backup policy will acquire the *Stopped* status.

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	Show. A	S 🔺 S	$\odot$ ×				
🕂 Add 💉 Edit 🗙 Del	ete Run Stop	O Disable 1	View Details				
Policy Name	Salesforce Alias	Status	Schedule	Salesforce User	Created Date ↓	Last Run Date	000
backup-policy-464	RGB	Success	<mark>ሪ</mark> Weekly	vbsf_cp@company.com	11/2/22, 1:13:53 PM	11/2/22, 1:14:05 PM	
backup-policy-461	RGB - VM-FR (production)	Success	O Disabled	mlp@company.com	11/2/22, 1:11:03 PM	11/2/22, 1:11:16 PM	
backup-policy-454	VeRGB - Puertos (producti	Success	U Weekly	sara.baker@company	10/25/22, 11:45:30 PM	11/2/22, 1:00:11 AM	

# Disabling and Enabling Backup Policies

By default, Veeam Backup for Salesforce runs all created backup policies according to the specified schedules. However, you can temporarily disable a backup policy so that Veeam Backup for Salesforce does not run the backup policy automatically. You will still be able to manually start or enable the disabled backup policy at any time you need.

To disable or enable a backup policy, do the following:

- 1. Navigate to the **Backup** tab.
- 2. Select the necessary backup policy.

#### NOTE

You can filter backup policies displayed on the **Backup** tab by using the icons in the **Show** field at the top of the list. If you set a filter, the settings apply to all companies and do not change during the current user session. That is why if you do not see the necessary policy in the list, make sure that the **All** filter is set.

#### 3. Click **Disable** or **Enable**.

Restore Browse			(P)RND •	dministrator 🗸 🔘 Englis	sh 🖌 💭 🛛 🏟 Co	onfiguration
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# **Editing Backup Policies**

You can edit backup policies created in Veeam Backup for Salesforce. For example, you may want to modify some settings for a backup policy, change the backup policy schedule and so on.

To edit backup policy settings, do the following:

- 1. Navigate to the **Backup** tab.
- 2. Select the necessary backup policy.

#### NOTE

You can filter backup policies displayed on the **Backup** tab by using the icons in the **Show** field at the top of the list. If you set a filter, the settings apply to all companies and do not change during the current user session. That is why if you do not see the necessary policy in the list, make sure that the **All** filter is set.

- 3. Click Edit. The Edit Backup Policy wizard will open.
- 4. Edit backup policy settings as described in section Creating Backup Policies.

#### **IMPORTANT**

If an error occurs when you reconnect to the Salesforce organization, check whether you specified the correct credentials of a user that belongs to the same Salesforce organization.

Policy name	Q Show:	All 🔮 🔺	8				
- Add	🗙 Delete 📔 🕨 Run 🔳 Sto	p 🛇 Disable	i View Details				
Policy Name	Salesforce Alias	Status	Schedule	Salesforce User	Created Date ↓	Last Run Date	00
backup-policy-464	RGB	Success	U Weekly	vbsf_cp@company.com	11/2/22, 1:13:53 PM	11/2/22, 1:14:05 PM	
backup-policy-461	RGB - VM-FR (production)	Success	S Disabled	mlp@company.com	11/2/22, 1:11:03 PM	11/2/22, 1:11:16 PM	
oackup-policy-454	VeRGB - Puertos (producti	Success	<mark>ሪ</mark> Weekly	sara.baker@company	10/25/22, 11:45:30 PM	11/2/22, 1:00:11 AM	

# **Removing Backup Policies**

You can permanently remove a backup policy from Veeam Backup for Salesforce. Note that the backed-up data will not be automatically deleted when you remove the policy.

To remove a backup policy, do the following:

- 1. Navigate to the **Backup** tab.
- 2. Select the necessary backup policy.

#### NOTE

You can filter backup policies displayed on the **Backup** tab by using the icons in the **Show** field at the top of the list. If you set a filter, the settings apply to all companies and do not change during the current user session. That is why if you do not see the necessary policy in the list, make sure that the **All** filter is set.

3. In the **Delete Confirmation** window, click **Remove** to acknowledge the operation.

Backup	Restore Browse			(P)RND V	dministrator 🗸 🛑 English	• 💭   🏟 a	onfiguration
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backup-policy-464	RGB	Success	<mark>ሪ</mark> Weekly	vbsf_cp@company.com	11/2/22, 1:13:53 PM	11/2/22, 1:14:05 PM	
backup-policy-461	RGB - VM-FR (production)	Success	O Disabled	mlp@company.com	11/2/22, 1:11:03 PM	11/2/22, 1:11:16 PM	
backup-policy-454	VeRGB - Puertos (producti	Success	🖒 Weekly	sara.baker@company	10/25/22, 11:45:30 PM	11/2/22, 1:00:11 AM	

# Viewing Backup Policy Details

After you create backup policies, Veeam Backup for Salesforce displays the policies on the **Backup** tab. Users assigned any role can see information on backup policies created for Salesforce organizations which data they have access to.

#### NOTE

You can filter backup policies displayed on the **Backup** tab by using the icons in the **Show** field at the top of the list. If you set a filter, the settings apply to all companies and do not change during the current user session. That is why if you do not see a policy in the list, make sure that the **All** filter is set.

Each policy in the list is described with the following set of properties:

- **Policy Name** the name of the backup policy.
- Salesforce Alias the alias of the Salesforce organization.
- Status the status of the latest backup policy session.

To see all policy sessions, click the link in the **Status** column. For more information, see Viewing Policy Session Statistics.

- Schedule the name or status of the schedule configured for the backup policy.
- Salesforce User the name of an Salesforce account specified during policy configuration.
- **Org Type** the type of the Salesforce organization.
- Salesforce ID the ID assigned to the organization in Salesforce.
- Salesforce URL the URL of the protected Salesforce organization.
- **Company** the name of a company that includes the Salesforce organization.
- Created Date the date and time when the backup policy was created.
- Last Run Date the date and time when the latest backup policy session started.

#### TIP

You can view settings configured for a specific backup policy. To do that, select the necessary backup policy and click **View Details**.

Backup	Restore Browse		📳 Veeam 🗸	Administrator 🗸 🌐 English	✓ ① Configuration
Policy name	Q Show:	All 🔮 🛦 🕄 🕑 🗙			
+ Add  Edit Policy Name	X Delete Run Stop	Disable <b>i</b> <u>View Details</u>	Salesforce User	Org Type	Salesforce ID 000
backup-policy-351	Veeam - Veeam (producti	Success 😃 Custom sche	dule is set Developer@veean	n.com Developer Edition	BFL8d000009qBFLEA2

## Viewing Policy Sessions

When creating a backup policy, you configure the default backup schedule according to which Veeam Backup for Salesforce backs up the Salesforce organization. You can also enable custom schedules in the backup policy settings to additionally protect specific groups of objects. The configured schedules are further used by the product to create backup jobs of 4 different types:

- Data job this type of job is used to back up data of objects of the protected Salesforce organization. Dedicated data jobs run according to each configured backup schedule (both custom and default). To learn how to configure backup schedules, see Creating Backup Policies.
- Metadata job this type of job is used to back up metadata of the protected Salesforce organization. Metadata jobs run according to default backup schedules only.
- File job this type of job is used to back up files and attachments of the protected Salesforce organization. File jobs run according to default backup schedules and only if you enable backup of files and attachments in backup policy settings.
- Validate job this type of job is used to compare backed-up data in the product database with data currently stored in the Salesforce database, that is, to detect hard-deleted items and mark them as deleted in the product database. Validate jobs automatically run weekly at the same time for each enabled backup policy. To learn how to enable backup policies, see Disabling and Enabling Backup Policies.

For each performed data protection operation, Veeam Backup for Salesforce starts a new session according to the created backup jobs, and stores its records in the configuration database. You can track real-time statistics of all running and completed operations from the **Backup** tab. To view the full list of tasks executed during an operation, click the link in the **Status** column. The **Backup Sessions** page will open.

### **Backup Sessions**

The Backup Sessions section displays information on all sessions of the backup policy.

Each session is described with the following set of properties:

- Session ID the ID assigned to the session.
- **Type** the type of the backup job by which the session is launched.
- **Start** the date and time when the session started.
- **Finish** the date and time when the session ended.
- Status the status of the session.
- **Message** a message displayed in case the session has the Warning or Error status.
- **Processed Objects** the number of backup policy objects processed during the session.
- **API Usage** the number of API calls sent during the session.
- Inserted the number of Salesforce records added compared to the previous session.
- **Updated** the number of Salesforce records updated compared to the previous session.
- **Deleted** the number of Salesforce records deleted compared to the previous session.
- **Failed** the number of Salesforce records whose processing failed.
- **Total** the number of Salesforce records processed.
- **Run Type** the type of the job run (defines whether the policy has been launched manually or automatically by schedule).
- **Schedule** the name of the schedule according to which the backup job is created.

### Session Details

The **Session Details** section displays information on processing of all backup objects included in the selected policy session.

Each part of the backup session dedicated to an object is described with the following properties:

- **Object / Event** the name of a backup object.
- Status the status of the object processing.
- **Duration** the duration of the object-related part of the session.
- **Start** the date and time when the object-related part of the session started.
- Finish the date and time when the object-related part of the session ended.
- **Message** the additional information on object protection status.
- Interval Start the start time of the interval during which changes in backup object are collected.
- Interval End the end time of the interval during which changes in backup object are collected.
- **API Usage** the number of API calls sent during the session.
- **Inserted** the number of Salesforce records added compared to the previous session.

- **Updated** the number of Salesforce records updated compared to the previous session.
- **Deleted** the number of Salesforce records deleted compared to the previous session.
- **Failed** the number of Salesforce records whose processing failed.
- **Total** the number of Salesforce records processed.

#### TIP

Consider the following:

- You can download backup session logs. To do that, click **Download Logs**, Veeam Backup for Salesforce will collect the backup logs and save them to the default download folder on the local machine in a single log.zip archive.
- You can see the detailed information on an object-related part of the session: To do that, select the necessary backup session and click **View Details**.

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# Viewing Backed-Up Data

On the **Browse** tab, you can look through the backed-up data and check whether restore is needed. This tab is available for the *Administrator*, *Backup Operator* and *Restore Operator* user roles that have access to the Salesforce organization.

Keep in mind that search results are limited to 1,000 records. You can choose the displayed information and apply additional search conditions using specific filters. To do that:

- 1. Navigate to the **Browse** tab.
- 2. Select a Salesforce organization whose records you want to restore.
- 3. Select a Salesforce object whose records you want to restore.

Only Salesforce objects that have been backed up are displayed at this step. If you do not see the necessary object, the object does not have a backup or cannot be restored. The object may not have a backup for the following reasons:

- $\circ$   $\,$  The object was excluded from the backup policy.
- The object does not contain any data.
- $\circ\;$  The Salesforce user whose permissions are used for backup operations does not have access to the object.
- Backup of the object is not supported in the current product version. For more information, see Appendix A. Unsupported Objects.
- 4. Choose whether you want to search through the latest records or the history records of the selected object:
  - If you select *Latest Records*, Veeam Backup for Salesforce will perform search only through the latest versions of backed-up records.
  - If you select *History Records*, Veeam Backup for Salesforce will perform search through all record versions in the history table for the time period that you specify.
- 5. Click Search.

Veeam Backup for Salesforce will display all records that match the search parameters. You can select records that you want to restore, click **Start Restore**, and choose whether you want to restore the entire record or specific fields. The restore job configuration wizard will open.

### Configuring Additional Search Parameters

By default, Veeam Backup for Salesforce shows the search results in the table with the columns that match specific Salesforce fields. You can choose the displayed information and apply additional search conditions using specific filters. To do that:

- 1. In the Filters and Display fields field, click Customize. The Data Filters and Display Fields window will open.
- 2. To specify the fields that must be displayed in the table, switch to the **Display Fields** tab, select the necessary Salesforce fields in the **Available** section, click **Add**. You can change the order of columns in the table using the **Move Up** and **Move Down** buttons.

3. To filter search results, switch to the **Data Filters** tab, click **Add Condition**. Select a field, a conditional operator and the necessary value from the drop-down lists.

Veeam Backup for Salesforce suggests a number of in-built conditional operators, such as *contains*, *equals*, *starts with*, *is null* and so on. These operators are used to make queries to databases. Note that the time required to process the request depends on the operator you are using, for example, processing a request with the equals operator will take less time than a request with the contains operator.

#### NOTE

When adding conditions, consider the following:

- To search for records with null field values, use the *is null* operator. Using the *equals* operator with an empty value is not supported.
- If you have a list of ID values, you can use the *in* operator and enter these IDs separated by a comma in the **Value** field.
- When you filter records using the lookup relationship fields, you must specify the correct ID in the **Value** field. It must be the ID of a record to which the lookup is linked.

By default, filters are linked by the AND logical operator. That is, a record is displayed in the search results when all specified conditions are met. You can change this behavior by linking filters with different operators. To do this, set the **Use filter logic** toggle to *On*, and specify the filter logic expression using condition ordinal number, brackets and logical operators, for example: 1 AND (2 OR 3) AND NOT 4.

4. To apply the configured settings, click **Search**.

Backup Restore Browse	(III) Veeam 🗸 🔺 Ad	ministrator 🗸 🜐 English 🗸 💭					
UPDATE: Veeam Backup for Salesforce new version (2.0.0-2	<ul> <li>743. Specify any filters to narrow down your search. Customize a disp</li> </ul>	Data Filters and Display Fields         ×           Specify any filters to narrow down your search. Customize a display fields set on the second tab.         ×					
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Veeam - Homeoffice v2 (production) Y Account (Acc	Q	↑ Move Up 🛛 ↓ Move Down					
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Selected: <b>2</b> of 16	AnnualRevenue (Annual Revenue)	Name (Account Name)					
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# Performing Salesforce Restore

Only users assigned the Administrator, Backup operator or Restore operator roles can perform restore operations in Veeam Backup for Salesforce. Users can perform restore operations within their permission scope – only for companies and organizations which data they have access to.

To recover backed-up data, Veeam Backup for Salesforce runs restore jobs. When you create a restore job, it is created as a draft that you can further edit, remove, start and clone. Once the restore job is started, it can be only stopped or cloned.

### In This Section

- Creating Restore Jobs
- Starting and Stopping Restore Jobs
- Cloning and Editing Restore Jobs
- Removing Restore Job Drafts
- Configuring Restore Mapping Settings
- Viewing Restore Job Details

# **Creating Restore Jobs**

You can create drafts of restore jobs that you want Veeam Backup for Salesforce to perform. After you create a draft, you can start the job right after you finish the restore job configuration wizard or later as described in section Starting and Stopping Restore Jobs.

Veeam Backup for Salesforce suggests you 4 restore options:

- Restore records restores the complete records with all fields that are defined as *updatable* and *creatable* in Salesforce. You can also restore attachments associated with these records and the related objects hierarchy.
- Restore field value restores specific field values of Salesforce records. Consider that you can only restore values of existing fields using this type of restore. If the fields were removed from Salesforce, you must perform the metadata restore first.
- Restore files restores Salesforce files and attachments.
- Restore metadata restores Salesforce metadata.

## **Restoring Records**

Record restore jobs allow you to restore earlier versions of modified or corrupted records and linked objects.

To create a record restore job, perform the following steps:

- 1. Launch the Restore Records wizard.
- 2. Specify a name and description for the restore job.
- 3. Select Salesforce organizations.
- 4. Choose the data that will be restored.
- 5. Choose what attachments associated with the specified records will be restored.
- 6. Enable restore of object hierarchy.
- 7. Configure additional restore settings.
- 8. Check permissions.
- 9. Finish working with the wizard.

### Step 1. Launch Restore Records Wizard

To launch the **Restore Records** wizard:

- 1. Navigate to the **Restore** tab.
- 2. Click New Restore > Records.

#### NOTE

If you have added multiple companies to Veeam Backup for Salesforce, before you launch the **Restore Records** wizard, select the company to which a Salesforce organization whose data you want to restore belongs from the company drop-down list at the top of the page.

For a company to be displayed in the list, it must be added to Veeam Backup for Salesforce beforehand as described in section Adding Companies, and the user must have permissions to access the company. For more information on user permissions, see User Roles and Permissions.

Backup	Restore	Browse			(P)RND V	Administrator 🗸	English 🗸	Configuration
Organization: (P)	RND - ar (sandbo	x) - testing long 🗸	Filter by restore job name	۹	Show: All	8 0 1	T Filter (None)	
📤 New Restore	<ul> <li>Clone</li> </ul>	Edit Draft 🛛 🗙 De	lete Draft 📄 Run 🔳	Stop 🧃 Vie	ew Details 🛛 🔀 Settings	~		
Records Fields	Туре	Status	Created Date ↓	Start Date	Finish Date	Created By	Modified By	Started By
Files Metadata	59059 Recor	ds 🖸 Draft	5/18/23, 9:46:23	_	_	admin	admin	_
restore-job-1	59058 Metac	ata 🔯 Draft	5/18/23, 9:35:51	-	_	admin	admin	_
restore-job-15	59057 Metac	lata 🔯 Draft	5/18/23, 8:29:52	_	_	admin	admin	-
restore-job-15	59056 Recor	ds 🔯 Draft	5/18/23, 4:42:02	_	-	admin	admin	-
restore-job-15	59054 Recor	ds 🔯 Draft	5/18/23, 3:18:14	_	_	admin	admin	_
restore-job-15	58604 Recor	ds 🔯 Draft	5/17/23, 2:01:18	-	-	admin	admin	-
restore-job-15	58601 Fields	🖸 Draft	5/17/23, 1:47:43	-	_	admin	admin	-
restore-job-15	58056 Files	🖸 Draft	5/17/23, 12:29:58	-	-	admin	admin	-
CLONE - resto	ore-j Fields	Stopped	5/16/23, 11:42:19	5/16/23, 1:54:3	5 5/16/23, 1:54:42	admin	admin	admin
restore-job-15	53102 Recor	ds 🖸 Draft	5/15/23, 11:34:20	-	_	admin	admin	_
restore-job-15	50906 Recor	ds 🖸 Draft	5/15/23, 9:55:06	-	-	admin	admin	-
restore-job-12	26917 Fields	8 Failed	5/12/23, 7:35:18	5/12/23, 7:35:3	2 5/12/23, 7:35:59	admin	admin	admin

### Step 2. Specify Restore Job Info

At the **Name** step of the wizard, use the **Job name** and **Job details or reason for restore** fields to specify a name for the new restore job and to provide a description for future reference.

$(\mathcal{L})$	Backup	Restore	Browse		(P)RND ~	Administrator 🗸	English	•	Configuration
$\langle\!$	Restor	e Record	restore-job-159061						
Name Organiz Data Files Hierarch Options Verificat	hy ; tion	Th Jot Jot	store Job Name is information will be includ o name: estore-job-159061 o details or reason for resto estoring org records	e restore. It may be he	lpful to reference the	incoming ticket or work iter	Π.		
					Next Ca	ncel			

### Step 3. Select Organization

At the **Organization** step of the wizard, select a Salesforce organization whose records you want to restore from the **Restore from** drop-down list. For a Salesforce organization to be displayed in the list, it must belong to the company specified at step 1.

By default, the records are restored to the same Salesforce organization. However, you can choose to restore records to another organization, for example, if you want to populate (seed) a sandbox with backed-up data of your production or another Salesforce sandbox organization. To do that, select a Salesforce organization to which you want to restore the records from the **Restore to** drop-down list. For a Salesforce organization to be displayed in the list of available organizations, it must belong to the company specified at step 1 and be compatible with the organization whose records you want to restore. This means that you can restore from a production or sandbox organization only to its sandbox copies.

#### IMPORTANT

When you restore to another organization, make sure that metadata of the object that you want to restore match metadata of the object in the target organization. If metadata is missing or does not match, you must first create a dedicated metadata restore job.

Backup Re	estore Browse (R) (P)RND v Administrator v (H) English v (L) (K) Configuration
Extore Restore	COIDS restore-job-159061
Name	Select Salesforce Organization
Organization	Choose what organization you would like to perform this restore for. Data will be restored back to the same organization. Restore from:
Data	(P)RND - preprod (sandbox)
Files	Restore to:
Hiorarchy	(P)RND - preprod (sandbox)
Hierarchy	(P)RND - ar (sandbox) - testing long name for browse and restore pages
Options	(P)RND - preprod (sandbox)
Verification	
Summary	
	Previous Next Cancel
Verification	(P)RND - ar (sandbox) - testing long name for browse and restore pages (P)RND - preprod (sandbox)

### Step 4. Choose Data to Restore

At the **Data** step of the wizard, you can look through the backed-up data, as well as browse, filter, and choose data that you want to restore.

To choose Salesforce records for restore:

- 1. Specify the record search parameters.
  - a. Select a Salesforce object whose records you want to restore.

Only Salesforce objects that have been backed up are displayed at this step. If you do not see the necessary object, the object does not have a backup or cannot be restored. The object may not have a backup for the following reasons:

- The object was excluded from the backup policy.
- The object does not contain any data.
- The Salesforce user whose permissions are used for backup operations does not have access to the object.
- Backup of the object is not supported in the current product version. For more information, see Appendix A. Unsupported Objects.
- b. Choose whether you want to search through the latest records or the history records of the selected object:
  - If you select *Latest records*, Veeam Backup for Salesforce will perform search only through the latest record versions.
  - If you select *History records*, Veeam Backup for Salesforce will perform search through all record versions in the history table for the time period that you specify.
- c. The records will be shown in the table with the columns that match specific Salesforce fields. To choose the displayed information, click **Customize** and select the necessary Salesforce fields on the **Display Fields** tab in the **Data Filters and Display Fields** window.
- 2. Apply additional search conditions using specific filters. To do that, click **Add Condition** on the **Data Filters** tab, select a field and a conditional operator from the drop-down lists, and enter the necessary value.

Veeam Backup for Salesforce suggests a number of in-built conditional operators, such as *contains*, *equals*, *starts with*, *is null* and so on. These operators are used to make queries to databases. Note that the time required to process the request depends on the operator you are using, for example, processing a request with the *equals* operator will take less time than a request with the *contains* operator.

#### NOTE

When adding conditions, consider the following:

- To search for records with null field values, use the *is null* operator. Using the *equals* operator with an empty value is not supported.
- If you have a list of ID values, you can use the *in* operator and enter these IDs separated by a comma in the **Value** field.
- When you filter records using the lookup relationship fields, you must specify the correct ID in the **Value** field. It must be the ID of a record to which the lookup is linked.

By default, filters are linked by the AND logical operator. That is, a record is displayed in the search results when all specified conditions are met. You can change this behavior by linking filters with different operators. To do this, set the **Use filter logic** toggle to *On*, and specify the filter logic expression using condition ordinal number, brackets and logical operators, for example: 1 AND (2 OR 3) AND NOT 4.

3. Click **Search**. Veeam Backup for Salesforce will show the results satisfying your search parameters in the **Records found** section.

By design, the search results will be displayed on the same pages where the records were originally shown. To make sure that you have seen all the results, look through all the pages.

4. Select the records from the search results displayed in the **Records found** section. Consider that the section displays the maximum number of 500 records per page. It is recommended that you use filters to reduce the number of search results.

You can choose the version of a record that will be restored. To do that, click the link in the **Version** column, compare the latest version of the backed-up record both with previous backed-up record versions and with the version of the record currently stored in the Salesforce database, and select the necessary version in the **Select Record Version to Restore** window. If you want Veeam Backup for Salesforce to show only field values that differ between the selected versions, set the **Compare changes** toggle to *On*.

#### TIP

By default, you can select up to 500,000 of records for this type of the restore job if hierarchy restore is disabled, and only up to 100 records if hierarchy restore is enabled. To change these limits, modify the hierarchy.restore.off.max.input.records and

hierarchy.restore.on.max.input.records parameter values as described in section Configuring Advanced Settings.

Backup Res	tore Browse	(P)RND 🗸 🛛 🕹 Administrator 🗸	Findlish 🗸 🗍 🏟 Configuration
← Restore Rec	ords restore-job-2new		
Name Organization	Select Records To Restore Use filters to find records and select recor Select object:	Data Filters and Display Fields Specify any filters to narrow down your search. Customize a display fields set c	in the second tab. $\hfill \times$
Data	Account (Account)	Data Filters Display Fields	↑ Move Up 🔰 Move Down
Files	Search Stop search		Selected (5)
Hierarchy Options	3,083 records found in Account	Selected: 1 of 34 Add> Add> CountSource (Account Source)	Selected: 0 of 5 IsDeleted (Deleted)
Verification	Account ID Version	BillingCountry (Billing Country) BillingGeocodeAccuracy (Billing Geocode Accur	Name (Account Name) BillingCity (Billing City)
Summary	Selected: 2 of 3,083 0018Y00002JCUZ Latest	BillingLatitude (Billing Latitude) BillingLongitude (Billing Longitude)	LastModifiedDate (Last Modified Date) LastModifiedByld (Last Modified By ID)
	0018Y00002jCUZ         Latest           0018Y00002jCUZ         Latest	BillingPostalCode (Billing Zip/Postal Code) BillingState (Billing State/Province)	
	0018Y00002qgHr Latest	BillingStreet (Billing Street)	
	0018Y00002qgICJ Latest	CreatedByld (Created By ID) CreatedDate (Created Date)	
		Description (Account Description) Industry (Industry)	
		Search Cancel	

### Step 5. Choose Attachments to Restore

At the **Files** step of the wizard, you can instruct Veeam Backup for Salesforce to restore files associated with the selected records. Salesforce content and attachments will be displayed at this step only if the records that you restore have any associated content or attachments and these files have been backed up by Veeam Backup for Salesforce.

1. Set the **Restore attachments** toggle to *On*.

Veeam Backup for Salesforce will display the backed-up files in the opened section.

2. You can exclude files from restore. To exclude the files, Veeam Backup for Salesforce uses filters. To add a data filter, click **Add Exclusion** in the **Exclusions** section, and specify a field, conditional operator and the necessary value. Then, click **Apply**.

Veeam Backup for Salesforce will exclude all files that satisfy the specified filter from restore.

Backup F	Restore	Browse					🔺 Administrator 🗸		Configuration
E Restore R	ecords	restore-job-159061							
Name	Res	tore Attachments					2 files will be restore	ed	
Organization		ore attachments and the		ersions for	r selected records.		Review attachments that attachments.	will be restored. Use filters to e	clude some
Data	Rest	ore attachments:	On 🚺				Search on this page	٩	
Files	Ex	clusions					File ID	Title 🕇	Is Deleted
Hierarchy	Excl	ude files from restore					00P0900000BPcHrEAL	contentVersion_h.gif	Not deleted
Options	Field	i:	Operator:	v	'alue:		068090000FshylAAB	fileRestore1	Not deleted
Verification		(File ID) 👻	starts with	~	034	×			
vernication	+	Add Exclusion							
Summary	A	pply Cancel							
							4		Þ
			[	Previous	s Next	Cancel			
					-				

### Step 6. Enable Hierarchy Restore

At the **Hierarchy** step of the wizard, Veeam Backup for Salesforce allows you to restore parent and child records linked to the records selected at step 4. While restoring hierarchy, the product analyzes all lookup relationship fields of the records and compares backed-up data with the current Salesforce data. For more information, see How Veeam Backup for Salesforce Restores Object Hierarchy.

#### IMPORTANT

If you have enabled restore of files and attachments at step 5, keep in mind that the product will not restore files and attachments of child and parent records. To restore them, create a dedicated file restore job.

To restore lookup relationships, do the following:

1. Set the **Restore objects hierarchy** toggle to *On*.

#### NOTE

Hierarchy restore can affect hundreds or thousands of records in Salesforce, and restoring even a single record and validating results can be tedious. That is why if you enable the hierarchy restore functionality, you can select a maximum of 100 Salesforce records to recover in one restore session. To change this limit, modify the hierarchy.restore.on.max.input.records parameter value as described in section Configuring Advanced Settings.

- 2. To specify the child hierarchy that must be restored, do the following for each record added to the restore session:
  - a. In the **Configure hierarchy for restore. Review all records.** section, select a record from the **Record** drop-down list.
  - b. In the list of lookup relationships for the record, select check boxes next to the objects whose records you want to restore. Veeam Backup for Salesforce will restore records of the child objects that you have selected only if you do not expand the object node, child objects under the node remain unselected and records of those objects will not be restored.

You can click **Select All** at the top of the lookup relationships list to select all displayed objects. However, child objects under the closed nodes will remain unselected. To select all child objects, expand all nodes first, and then click **Select All**.

#### **IMPORTANT**

For the records that have not been reviewed in the Configure hierarchy for restore section, Veeam Backup for Salesforce will restore the child hierarchy to the default 1st level only. To edit the default level to which child records will be restored, modify the hierarchy.restore.default.depth parameter value as described in section Configuring Advanced Settings.

- 3. To configure hierarchy settings, click **Advanced Settings** in the **Configure hierarchy for restore. Review all records.** section and do the following:
  - From the Overwrite fields drop-down list, choose what fields will be updated for existing child records:
    - To update only the parent lookup fields of the existing child records, select *Parent lookup only*.
    - To update all fields of the existing child records, select *All fields*.

- Not to update fields of the existing child records, select None.
- From the **Stop processing hierarchy** drop-down list, choose when to stop updating the child records.
  - To stop proceeding to deeper levels of the hierarchy if a child record exists in Salesforce, select *Exists*. This child record will be the last updated record. Keep in mind that it will be updated according to the selected **Overwrite fields** option.
  - To stop proceeding to deeper levels of the hierarchy if a child record exists in Salesforce and the lookup field value matches the backed-up value, select *Correct lookup*. This child record will be the last updated record. Keep in mind that it will be updated according to the selected **Overwrite fields** option.
  - To stop proceeding to deeper levels of the hierarchy if a child record exists in Salesforce and the values of all fields of the record match the backed-up values, select *All fields match*.
  - To proceed with hierarchy restore until all the selected child records are updated, select *Never*.

 From the Restore parent hierarchy drop-down list, select the maximum level of the parent object hierarchy that will be restored for all records. By default, Veeam Backup for Salesforce restores the 1st level parent records only. To edit the default level, modify the hierarchy.max.parents.restore parameter value as described in section Configuring Advanced Settings.

The restore parent hierarchy settings are applied to every record in the session and not only to the records selected at step 4. It means that Veeam Backup for Salesforce will restore the record and then will verify lookup links to its parent records. This process will repeat for all the selected child records.

#### NOTE

The product restores child and parent records of the versions that you selected at step 4.

Backup Res	store Browse	Ream • Administrator • Reglish • C. Configuration									
Externel Restore Rec	Restore Records restore-job-159061										
Name Organization Data	Restore Objects Hierarchy Find and restore related records, and restore lookup relationships. Restore objects hierarchy: On 0										
Files	Configure hierarchy for restore. Review all records. First level of parent and child hierarchy is configured by default.	Opportunity Hierarchy restore will create any deleted records and update lookup relationships for existing records.									
Options	Record:     0fA8d000005UfAqAAL (GenePoint)       ✓     Select All       ↓ Advanced Setting	Search by text Q									
Verification	✓ ✓ Account	Record ID Name † Deleted Chang									
Summary	> 🗸 Opportunity All (2)	0068d00000CnQ0JAAV Gen000int Lab Generators False 5/5/23									
	Contact All (1) Case All (2)	0068d00000CnQ0AAAV Gen000int Standby Gener False 5/5/23									
	Case All (2)										
	Previous	Next Cancel									

### How Veeam Backup for Salesforce Restores Object Hierarchy

Consider the following example. You want to restore a record in the **Contact** object:

- This record refers to another record in the **Account** object. In this case, the **Account** object is the 1st level parent for the **Contact** object.
- There are 2 backed-up records in the **Case** object linked to the record you want to restore. The **Case** object is the 1st level child for the **Contact** object. If there are also records in the **CaseMilestone** object that are linked to these 2 records in the **Case** object, the **CaseMilestone** object will be the 2nd level child for the **Contact** object.

### Parent Object Restore

By default, the product restores the 1st level parent records only (that is, the record in the **Account** object from our example). However, you can instruct Veeam Backup for Salesforce to restore parent records of higher hierarchy levels as described at step 6 of the **Restore Records** wizard. While restoring a parent record, the product checks whether the record exists in the Salesforce database:

- If the parent record exists in Salesforce, the product skips the record and does not proceed to higher levels of the parent hierarchy for this record.
- If the parent record does not exist in Salesforce, the product creates the record in Salesforce using the backed-up data.

### Child Object Restore

By default, the product restores the 1st level child records only (that is, 2 records in the **Case** object in our example). However, you can instruct Veeam Backup for Salesforce to restore child records of deeper hierarchy levels (records in the **CaseMilestone** object) as described at step 6 of the **Restore Records** wizard. While restoring a child record, the product checks whether the record exists in the Salesforce database:

- If a child record exists in Salesforce and has the same data as the backed-up record data, the product skips the record.
- If a child record exists in Salesforce, but the record data has changed, the product updates the record using the backed-up data.
- If a child record exists in Salesforce but it is in the Salesforce Recycle Bin, the product restores the record from the Recycle Bin.
- If a child record does not exist in Salesforce, the product creates the record in Salesforce using the backed-up data.

### Step 7. Configure Additional Restore Settings

At the **Options** step of the wizard, specify additional restore settings:

1. To allow Veeam Backup for Salesforce to overwrite field values of the existing records in Salesforce during restore, select the **Restore field values for records. Job setting applies to all restored records** check box.

For the existing Salesforce records that contain values other than *null*, the product does not replace the values with *null*. To replace the values with *null*, select the **Restore empty field values. Empty field values from backup will replace current values on records** check box.

2. To manually override values of specific fields in all restored records, click the link in the **Override field** values field. In the **Override field values for selected records** window, click **Add Field**, select the field for which you want to specify value from the **Field** drop-down list, and provide the necessary value. Then, click **Apply**. For example, it can be used for sandbox seeding when you need to mask sensitive data.

If you want to restore the value of the field saved in the restore point and add comments to it, you can use the following format: <text> {value}, where <text> - is the text that you want to add to the backed-up field value. For example, if the backed-up value of the **Name** field is *Account1*, and you select this field and specify the following value to override: *New {value}*, then the restored value of the field will be *New Account1*.

Consider that Veeam Backup for Salesforce will override field values for the records selected at step 4 only.

#### IMPORTANT

When overriding time values, consider that you specify time in the UTC time zone and this value will be displayed in Salesforce according to the time zone set on the Salesforce site.

3. You can map fields to other Salesforce fields if you want to restore the values from the backup to the different fields. To do that, click **Map old fields to new fields**. In the **Map Fields** window, click **Add Field**, select the field from backup that you want to map to a new one, and specify the Salesforce field to which it will be mapped. Then, click **Apply**.

Consider that you can configure mapping only for existing Salesforce fields of the records selected at step 4. If you removed a field from Salesforce, you cannot map it to another field.

- 4. Business logic and automated rules configured in Salesforce can block Veeam Backup for Salesforce restore operations or trigger undesirable side processes. You can choose either to manually deactivate Flows, Validation Rules and Apex Triggers in Salesforce or to instruct the product to bypass all blocking automation while performing a restore operation. To do that, select one of the options in the **Turn off automation** section:
  - Select the I will manually turn off all blocking automation option, if you are a Salesforce Administrator and want to deactivate Flows, Validation Rules and Apex Triggers in Salesforce manually.
  - Select the Automatically turn off all automation option to automatically update Flows, Validation Rules and Apex Triggers so that they are bypassed while the product performs the restore operation without impacting the Salesforce functionality. When you choose this option for a restore job for the first time, updating Flows, Validation Rules and Apex Triggers will take significant time to complete. However, as the updates will be kept in Salesforce, all further restore operations will run faster.

 Select the Temporarily turn off all automation option to automatically update Flows, Validation Rules and Apex Triggers so that they are bypassed while the product performs the current restore operation only without impacting the Salesforce functionality. All changes made by the product will be reverted after the restore operation is over. Note that updating Flows, Validation Rules and Apex Triggers and reverting the changes may take significant time to complete.

Backup Re	estore Browse	Veeam 🗸 🔺 Administrator 🗸	English 🗸 💭 🔅 Configuration
Restore Rec	ecords restore-job-455		
Name	Additional Restore Options		
Organization	Customize how certain data or fields should be handled during restore.		
Data	Existing records update		
Files	Restore field values for records. Job setting applies to all restored record		
Hierarchy	Restore empty field values. Empty field values from backup will repla	ace current values on records.	
Options	Field customization options		
Verification	Override field values: 1 field will be overriden		
	Map old fields to new fields: 특端 Not specified		
Summary	Turn off automation (workflows, flows, apex triggers and validation rules)		
	I will manually turn off all blocking automation		
	O Automatically turn off all automation		
	C Temporarily turn off all automation		
	Previous	Next Lu Cancel	

### Step 8. Check Permissions

At the **Verification** step of the wizard, you can run an automated check for the user permissions and the Salesforce object selected for restore. To do that, click the **Not verified yet** link.

To export the list that contains all fields of the records selected at step 4 of the wizard, click **Download CSV File**. Veeam Backup for Salesforce will export all the record fields to a CSV file and download it to your local machine.

Backup	Res	tore	Browse		) (P)RND 🗸 🔶	🛓 Administrator 🗸	🕀 English 🖌		Configuration	
Rest	Restore Records     restore-job-159061									
Name Organization Data Files Hierarchy Options Verification		This Verif Quid resto	ify Permissions verification step is optional. It provides you visibilit ication: ▲ 1 Warning k check will verify any permission or data settings that red but can help avoid obvious issues. Download CSV File rt the list of IDs that will be restored from the backup.	can block your restore. This ch						
				Previous Next	Cancel					

### Step 9. Finish Working with Wizard

At the **Summary** step of the wizard, review configured settings and click **Finish**.

If you want Veeam Backup for Salesforce to start restore automatically after you complete the wizard, select the **Start the job after clicking the Finish button** check box. Otherwise, the job draft will be created, and you will have to manually run the job as described in section **Starting and Stopping Restore Jobs**.

#### TIP

To view all objects added to the restore session, click the link in the **Object** field.

Backup Re	store Browse		(P)RND V	Administrator 🗸	English 🖌	Configuration
Externa Restore Re	cords restore-job-159061					
Name	Hierarchy					^
Organization Data	Child hierarchy: Parent hierarchy: Overwrite fields: Stop processing hierarchy:	Yes Do not restore Parent lookup only Exists				
Files	Mapping					
Hierarchy	Fields mapping: Fields override:	-				
Options	Options					
Verification	Overwrite records: Write null values:	Yes No				
Summary	Disable automation: Roll-back disable automation:	No No				
	Permanently deleted Auto-number fields w	objects are restored with different IDs. ill get next sequential value.				
	Start the job after clicking the	ne Finish button				v
		Previous	Finish Car	ncel		

## **Restoring Field Values**

Field value restore jobs allow you to recover earlier versions of changed of deleted field values.

#### IMPORTANT

You can only restore values of existing fields using this type of restore. If the fields were removed from Salesforce, you must perform the metadata restore first.

To create a field value restore job, perform the following steps:

- 1. Launch the Restore Field Values wizard.
- 2. Specify a name and description for the restore job.
- 3. Select Salesforce organizations.
- 4. Select records whose field values you want to restore.
- 5. Select fields whose values will be restored.
- 6. Configure additional restore settings.
- 7. Check permissions.
- 8. Finish working with the wizard.

### Step 1. Launch Restore Field Values Wizard

To launch the **Restore Field Values** wizard:

- 1. Navigate to the **Restore** tab.
- 2. Click **New Restore > Fields**.

#### NOTE

If you have added multiple companies to Veeam Backup for Salesforce, before you launch the **Restore Field Values** wizard, select the company to which a Salesforce organization whose data you want to restore belongs from the company drop-down list at the top of the page.

For a company to be displayed in the list, it must be added to Veeam Backup for Salesforce beforehand as described in section Adding Companies, and the user must have permissions to access the company. For more information on user permissions, see User Roles and Permissions.

Backup	Restore Brow	vse			(P)RND V	Administrator 🗸	English 🖌	(L) Configuration
Organization: (P)RN	D - ar (sandbox) - testing	; long 👻 Filter	by restore job name	Q Sh	ow: All 🔮 🔺	8 0 🖸	T Filter (None)	
📤 New Restore 👻	🗍 Clone 📝	Edit Draft 🛛 🗙 Delete I	Draft 🕨 Run 🔳	Stop 🧃 View De	etails 🛛 🛃 Settings 🔻	,		
Records	Туре	Status	Created Date ↓	Start Date	Finish Date	Created By	Modified By	Started By
Files Metadata 590	59 Records	🔯 Draft	5/18/23, 9:46:23	_	_	admin	admin	_
restore-job-1590	58 Metadata	🖸 Draft	5/18/23, 9:35:51	-	-	admin	admin	-
restore-job-1590	57 Metadata	🖸 Draft	5/18/23, 8:29:52	_	-	admin	admin	-
restore-job-1590	56 Records	🖸 Draft	5/18/23, 4:42:02	_	-	admin	admin	-
restore-job-1590	54 Records	🖸 Draft	5/18/23, 3:18:14	_	-	admin	admin	-
restore-job-1586	i04 Records	🖸 Draft	5/17/23, 2:01:18	_	-	admin	admin	-
restore-job-1586	i01 Fields	🖸 Draft	5/17/23, 1:47:43	-	-	admin	admin	-
restore-job-1580	56 Files	🖸 Draft	5/17/23, 12:29:58	_	_	admin	admin	_
CLONE - restore-	j Fields	Stopped	5/16/23, 11:42:19	5/16/23, 1:54:35	5/16/23, 1:54:42	admin	admin	admin
restore-job-1531	02 Records	🖸 Draft	5/15/23, 11:34:20	_	-	admin	admin	_
restore-job-1509	06 Records	🖸 Draft	5/15/23, 9:55:06	_	-	admin	admin	-
restore-job-1269	17 Fields	8 Failed	5/12/23, 7:35:18	5/12/23, 7:35:32	5/12/23, 7:35:59	admin	admin	admin

### Step 2. Specify Restore Job Info

At the **Name** step of the wizard, use the **Job name** and **Job details or reason for restore** fields to specify a name for the new restore job and to provide a description for future reference.

Backup Res	store Browse (P)RND v Administrator v (D) Configuration
Restore Fiel	d Values restore-job-159062
Name     Organization       Data       Fields       Options       Verification	Restore Job Name         This information will be included in the audit log of the restore. It may be helpful to reference the incoming ticket or work item.         Job name:         restore-job-159062         Job details or reason for restore:         restoring field values
Summary	Next

### Step 3. Select Organization

At the **Organization** step of the wizard, select a Salesforce organization whose field values you want to restore from the **Restore from** drop-down list. For a Salesforce organization to be displayed in the list, it must belong to the company specified at step 1.

By default, the field values are restored to the same Salesforce organization. However, you can choose to restore field values to another organization. To do that, select a Salesforce organization to which you want to restore the field values from the **Restore** to drop-down list. For a Salesforce organization to be displayed in the list of available organizations, it must belong to the company specified at step 1 and be compatible with the organization whose field values you want to restore. This means that you can restore from a production or sandbox organization only to its sandbox copies.

$\square$	Backup	Resto	re	Browse	(P)RN	D ~   (	💄 Administrator 🗸	💮 English 🗸	Configuration
$\bigotimes$	Restore	e Field	Valu	JES restore-job-159062					
Name				ct Salesforce Organization					
Organiza	ation			se what organization you would like to perform this restore for. Dat ore from:	ta will be restored	l back to the	e same organization.		
Data			(P)R	ND - preprod (sandbox)	~				
Fields			Resto		_				
Options				ND - preprod (sandbox) ND - ar (sandbox) - testing long name for browse and restore pages	5				
Verificat	tion		(P)R	ND - preprod (sandbox)					
Summar	ry								
				Previous	Next	Cance	1		

### Step 4. Choose Data to Restore

At the **Data** step of the wizard, you can look through the backed-up data, as well as browse, filter, and choose data that you want to restore.

To choose Salesforce records whose field values you want to restore:

- 1. Specify the record search parameters.
  - a. Select a Salesforce object whose record fields you want to restore.

Only Salesforce objects that have been backed up are displayed at this step. If you do not see the necessary object, the object does not have a backup or cannot be restored. The object may not have a backup for the following reasons:

- The object was excluded from the backup policy.
- The object does not contain any data.
- The Salesforce user whose permissions are used for backup operations does not have access to the object.
- Backup of the object is not supported in the current product version. For more information, see Appendix A. Unsupported Objects.
- b. Choose whether you want to search through the latest records or the history records of the selected object:
  - If you select *Latest records*, Veeam Backup for Salesforce will perform search only through the latest record versions.
  - If you select *History records*, Veeam Backup for Salesforce will perform search through all record versions in the history table for the time period that you specify.
- c. The records will be shown in the table with the columns that match specific Salesforce fields. To choose the displayed information, click **Customize** and select the necessary Salesforce fields on the **Display Fields** tab in the **Data Filters and Display Fields** window.
- 2. Apply additional search conditions using specific filters. To do that, click **Add Condition** on the **Data Filters** tab, select a field and a conditional operator from the drop-down lists, and enter the necessary value.

Veeam Backup for Salesforce suggests a number of in-built conditional operators, such as *contains*, *equals*, *starts with*, *is null* and so on. These operators are used to make queries to databases. Note that the time required to process the request depends on the operator you are using, for example, processing a request with the *equals* operator will take less time than a request with the *contains* operator.

#### NOTE

When adding conditions, consider the following:

- Veeam Backup for Salesforce automatically adds a condition that filters the records to show only existing Salesforce fields. If you want to restore value of a field that was removed from Salesforce, you must perform the metadata restore first.
- To search for records with null field values, use the *is null* operator. Using the *equals* operator with an empty value is not supported.
- If you have a list of ID values, you can use the *in* operator and enter these IDs separated by a comma in the **Value** field.
- When you filter records using the lookup relationship fields, you must specify the correct ID in the **Value** field. It must be the ID of a record to which the lookup is linked.

By default, filters are linked by the AND logical operator. That is, a record is displayed in the search results when all specified conditions are met. You can change this behavior by linking filters with different operators. To do this, set the **Use filter logic** toggle to *On*, and specify the filter logic expression using condition ordinal number, brackets and logical operators, for example: 1 AND (2 OR 3) AND NOT 4.

3. Click **Search**. Veeam Backup for Salesforce will show the results satisfying your search parameters in the **Records found** section.

By design, the search results will be displayed on the same pages where the records were originally shown. To make sure that you have seen all the results, look through all the pages.

4. Select the records from the search results in the **Records found** section. Consider that the section displays the maximum number of 500 records per page. It is recommended that you use filters to reduce the number of search results.

You can choose the version of a record that will be restored. To do that, click the link in the **Version** column, compare the latest version of the backed-up record with previous backed-up record versions and the version of the record currently stored in the Salesforce database, and select the necessary version in the **Select Record Version to Restore** window. If you want Veeam Backup for Salesforce to show only field values that differ between the selected versions, set the **Compare changes** toggle to *On*.

#### TIP

By default, you can select up to 500,000 of records for one field value restore session. To change this limit, modify the fields.restore.max.input.records parameter value as described in section Configuring Advanced Settings.

Backup Res	tore Browse	(P)RND V AC	dministrator 🗸	English 🗸 💭 🏟 Configuration					
Restore Field Values restore-job-269214									
Name	Select Records To Restore Use filters to find records and select reco	Data Filters and Display Fields Specify any filters to narrow down your search. Customize a disp	olay fields set on	the second tab. $\hfill \times$					
Organization	Select object:	Data Filters Display Fields							
Data	Account (Account)								
Fields	Search Stop search	۹	1	Move Up 🛛 🔶 Move Down					
rielus	Stop search	Available (57)	S	elected (7)					
Options		Selected: 1 of 57	Add > In	Selected: 0 of 7					
Verification	Account ID Version	AccountNumber (Account Number)		Id (Account ID)					
- Children	Selected: 0 of 873	AccountSource (Account Source)	< Remove	SystemModstamp (System Modstamp)					
Summary	0018d00000f51r Latest	Active_c (Active)		IsDeleted (Deleted)					
	0018d00000f51r Latest	AnnualRevenue (Annual Revenue)		Name (Account Name)					
	0018d00000f51r Latest	BillingCountry (Billing Country)		BillingCity (Billing City)					
	0018d00000f51r Latest	BillingGeocodeAccuracy (Billing Geocode Accur		LastModifiedDate (Last Modified Date)					
	0018d00000f51r Latest	BillingLatitude (Billing Latitude)		LastModifiedById (Last Modified By ID)					
		BillingLongitude (Billing Longitude)							
		BillingPostalCode (Billing Zip/Postal Code)							
		Search Cancel							

### Step 5. Select Fields to Restore

At the **Fields** step of the wizard, choose fields whose values you want to restore for the selected records. Consider that only values of the fields that are defined by Salesforce as *updatable* can be restored. For example, you cannot restore values of the *read-only* or *formula* fields. These fields will be grayed out.

#### TIP

To restore a *formula* field, perform the metadata restore job.

Backup Res	tore Browse	ND 🗸 Administrator 🗸 🖨 English 🗸 💭							
Restore Fiel	Restore Field Values restore-job-159062								
Name	Select Fields To Restore You can restore one or serveral fields at the same time.	The following field values will be restored You can choose older versions of the record on the Data step.							
Organization	Field name Q	Type in a value to filter Q							
Fields	Name	Id † Aberdeen list # of Accou							
Options	Selected: 5 of 452	0014C00000davLDQAY null							
Verification	fnligo_sfnsio_Days_Overdue_c Days_Overdue (IO)	0014C00000davLGQAY null							
Summary	filigo_sfrsio_NetSuite_Id_c MetSuite_Id(I0)	0014C00000VOHvcQAH null							
	fnligo_sfnsio_NetSuite_Record_c NetSuite Record (IO)								
	fnligo_sfnsio_NetSuite_Sync_Error_c NetSuite Sync Error (IO)								
	fnligo_sfnsio_Overdue_Balance_c Overdue Balance (IO)								
	fnligo_sfnsio_Skip_Export_To_NetSuite_c Skip Export To NetSuite (IO)								
	fnligo_sfnsio_Unbilled_Orders_c	4							
	Previous Next	ancel							

### Step 6. Configure Additional Restore Settings

At the **Options** step of the wizard, specify additional restore settings:

1. To allow Veeam Backup for Salesforce to overwrite field values during restore, select the **Restore field** values for records. Job setting applies to all restored records check box.

For the existing Salesforce records that contain values other than *null*, the product does not replace the values with *null*. To replace the values with *null*, select the **Restore empty field values. Empty field values from backup will replace current values on records** check box.

2. To manually override values of specific fields in all restored records, click **Override field values**. In the **Override field values for selected records** window, click **Add field**, select the field for which you want to specify value from the **Field** drop-down list, and provide the necessary value. Then, click **Apply**.

If you want to restore the value of the field saved in the restore point and add comments to it, you can use the following format: <text> {value}, where <text> - is the text that you want to add to the backed-up field value. For example, if the backed-up value of the **Name** field is *Account1*, and you select this field and specify the following value to override: *New {value}*, then the restored value of the field will be *New Account1*.

#### IMPORTANT

When overriding time values, consider that you specify time in the UTC time zone and this value will be displayed in Salesforce according to the time zone set on the Salesforce site.

3. You can map fields to other Salesforce fields if you want to restore the values from the backup to the different fields. To do that, click **Map old fields to new fields**. In the **Map Fields** window, click **Add Field**, select the field from backup that you want to map to a new one, and specify the Salesforce field to which it will be mapped. Then, click **Apply**.

Consider that you can configure mapping only for existing Salesforce fields. If you removed a field from Salesforce, you cannot map it to another field.

- 4. Business logic and automated rules configured in Salesforce can block Veeam Backup for Salesforce restore operations or trigger undesirable side processes. You can choose to manually handle the Salesforce automation exceptions or to let the product permanently or temporarily disable all triggered automation for the user that is executing the backup and restore operations. To do that, select one of the automation modes in the **Turn off automation** section:
  - Select the I will manually turn off all blocking automation option, if you want to disable Flows and inactivate Validation Rules and Apex Triggers on the Salesforce side or add the Salesforce user whose permissions are used to perform backup and restore operations to exclusions manually.
  - Select the Automatically turn off all automation option, to automatically disable all blocking automation for the Salesforce user whose permissions are used to perform backup and restore operations. The user will be added to exclusions for all configured automation functionality without specifying any time period.

This functionality will be disabled in Veeam Backup for Salesforce during the restore operation only, and then it will be enabled again. When you select this option again, it will take less time to disable automation because all the changes have been already saved in the Salesforce medatada.

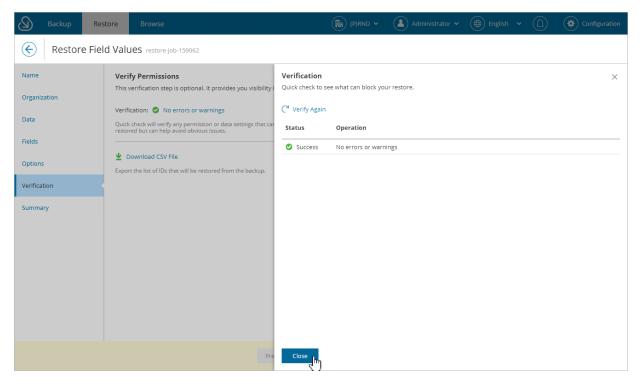
 Select the Temporarily turn off all automation option, to temporarily disable all blocking automation for the Salesforce user whose permissions are used to perform backup and restore operations. The automation functionality will be disabled only for the restore operation duration, and then it will be enabled again. Note that each operation of disabling and enabling of automation my take significant time to complete.

Backup Re	store Browse 🕀 Veeam 🗸 Administrator 🗸 💮 English 🗸 💭 🐼 Configuration	
External Restore Fie	Id Values restore-job-457	
Name	Additional Restore Options Customize how certain data or fields should be handled during restore.	
Organization	Existing records update	
Data	Restore field values for records. Job setting applies to all restored records.	
Fields	Restore empty field values. Empty field values from backup will replace current values on records.	
Options	Field customization options	
Verification	Override field values:	
Summary	Map old fields to new fields: $\frac{2}{3} \frac{\pi^2}{3}$ Not specified	
	Turn off automation (workflows, flows, apex triggers and validation rules)	
	I will manually turn off all blocking automation	
	O Automatically turn off all automation	
	C Temporarily turn off all automation	
	Previous Next In Cancel	

### Step 7. Check Permissions

At the **Verification** step of the wizard, you can run an automated check for the user permissions and the Salesforce object selected for restore. To do that, click the **Not verified yet** link.

To export the list that contains all fields of the records selected at step 4 and included in the restore job, click **Download CSV File**. Veeam Backup for Salesforce will export all the record fields to a CSV file and download it to your local machine.



### Step 8. Finish Working with Wizard

At the **Summary** step of the wizard, review configured settings and click **Finish**.

If you want Veeam Backup for Salesforce to start restore automatically after you complete the wizard, select the **Start the job after clicking the Finish button** check box. Otherwise, the job draft will be created, and you will have to manually run the job as described in section **Starting and Stopping Restore Jobs**.

#### TIP

To view all objects added to the restore session, click the link in the **Object** field.

Backup Rest	ore Browse		(P)RND ¥	Administrator 🗸	🕀 English 🗸	figuration
Restore Field	d Values restore-job-159062					
Name	Data					^
Organization	Restore type: All records: Object:	Fields No Account (Total Objects: 2)				
Data	Mapping					
Fields Options	Fields mapping: Fields override:	_				
	Options					
Verification Summary	Overwrite records: Write null values: Disable automation:	Yes No No				
	Roll-back disable automation:	No				
	Permanently deleted of Auto-number fields wi	bjects are restored with different IDs. Il get next sequential value.				
	Start the job after clicking th	e Finish button				*
		Previous	Finish Car	ncel		

# **Restoring Files**

File restore jobs allow you to recover changed and deleted content and attachments.

#### IMPORTANT

Consider the following:

- When you restore a content version, Salesforce will create a new version for this Content Document.
- When you restore an attachment, Veeam Backup for Salesforce will create a new file with the same file name and new ID. If the source file still exists, the file content will be updated.
- Restore of the *MobileApplicationDetail* and *MailmergeTemplate* types of content is not supported in Veeam Backup for Salesforce.
- Restore of embedded images in rich text area fields is not supported in Veeam Backup for Salesforce, except for images that are stored as content versions in *FeedAttachment* objects.
- To be able to restore an attachment of an email message, the user whose credentials are used to authorize the connection to Salesforce must be assigned the *Update Email Messages* permission. For more information, see Required Permissions.

To create a file restore job, perform the following steps:

- 1. Launch the Restore Files wizard.
- 2. Specify a name and description for the restore job.
- 3. Select Salesforce organizations.
- 4. Select files and attachments to restore.
- 5. Finish working with the wizard.

## Step 1. Launch Restore Files Wizard

To launch the **Restore Files** wizard:

- 1. Navigate to the **Restore** tab.
- 2. Click **New Restore** > **Files**.

### NOTE

If you have added multiple companies to Veeam Backup for Salesforce, before you launch the **Restore Files** wizard, select the company to which a Salesforce organization whose data you want to restore belongs from the company drop-down list at the top of the page.

For a company to be displayed in the list, it must be added to Veeam Backup for Salesforce beforehand as described in section Adding Companies, and the user must have permissions to access the company. For more information on user permissions, see User Roles and Permissions.

Backup Re	store Browse				(P)RND V	Administrator 🗸	English 🗸	(D) Configuration
Organization: (P)RND - ar	(sandbox) - testing long	g V Filter	by restore job name	٩	Show: All 🥥 🔺	8 0 2	<b>T</b> Filter (None)	
📤 New Restore 👻	🗍 Clone 🛛 🦯 Edit I	Draft 🛛 🗙 Delete 🛛	Draft 🕨 Run 🔳	Stop 🧃 View	Details 🛛 🖬 Settings	<b>~</b>		
Records Fields	Туре	Status	Created Date ↓	Start Date	Finish Date	Created By	Modified By	Started By
Files	Records	🖸 Draft	5/18/23, 9:46:23	_	_	admin	admin	_
restore-job-159058	Metadata	🖸 Draft	5/18/23, 9:35:51	-	-	admin	admin	-
restore-job-159057	Metadata	🖸 Draft	5/18/23, 8:29:52	_	_	admin	admin	-
restore-job-159056	Records	🖸 Draft	5/18/23, 4:42:02	-	_	admin	admin	_
restore-job-159054	Records	🖸 Draft	5/18/23, 3:18:14	-	-	admin	admin	-
restore-job-158604	Records	🔯 Draft	5/17/23, 2:01:18	_	_	admin	admin	-
restore-job-158601	Fields	🖸 Draft	5/17/23, 1:47:43	-	-	admin	admin	-
restore-job-158056	Files	🖸 Draft	5/17/23, 12:29:58	-	-	admin	admin	-
CLONE - restore-j	Fields	Stopped	5/16/23, 11:42:19	5/16/23, 1:54:35	. 5/16/23, 1:54:42	admin	admin	admin
restore-job-153102	Records	🖸 Draft	5/15/23, 11:34:20	-	-	admin	admin	-
restore-job-150906	Records	🖸 Draft	5/15/23, 9:55:06	-	_	admin	admin	-
restore-job-126917	Fields	😣 Failed	5/12/23, 7:35:18	5/12/23, 7:35:32	. 5/12/23, 7:35:59	admin	admin	admin

## Step 2. Specify Restore Job Info

At the **Name** step of the wizard, use the **Job name** and **Job details or reason for restore** fields to specify a name for the new restore job and to provide a description for future reference.

$\square$	Backup	Restore	Browse		(P)RND 🗸	Administr			Configuration
$\langle \!$	Restor	e Files resto	pre-job-159064						
Name Organiz Data Summa		Job re: Job	store Job Name : Information will be included name: store-Job-159064 details or reason for restore: storing files	e restore. It may be l	helpful to reference th	ie incoming ticket o	r work item.		
					Next C	ancel			

## Step 3. Select Organization

At the **Organization** step of the wizard, select a Salesforce organization whose files and attachments you want to restore from the **Restore from** drop-down list. For a Salesforce organization to be displayed in the list, it must belong to the company specified at step 1.

By default, files and attachments are restored to the same Salesforce organization. However, you can choose to restore files and attachments to another organization. To do that, select a Salesforce organization to which you want to restore files and attachments from the **Restore** to drop-down list. For a Salesforce organization to be displayed in the list of available organizations, it must belong to the company specified at step 1 and be compatible with the organization whose files and attachments you want to restore. This means that you can restore from a production or sandbox organization only to its sandbox copies.

Backup Res	tore Browse (P)RND v Administrator v (D) Configuration
External Restore File	S restore-job-159064
Name	Select Salesforce Organization
Organization	Choose what organization you would like to perform this restore for. Data will be restored back to the same organization.
Data	Restore from: (P)RND - preprod (sandbox)
Summary	Restore to: (P)RND - preprod (sandbox) (P)RND - ar (sandbox) - testing long name for browse and restore pages
	(P)RND - preprod (sandbox)
	Previous Next Cancel

## Step 4. Select Files to Restore

At the **Data** step of the wizard, you can look through the backed-up data, as well as browse, filter, and choose data that you want to restore. Only files that have been backed up are displayed at this step.

To choose files for restore:

- 1. Specify the file search parameters.
  - a. From the **Search in** drop-down list, select a type of the restored files. If you select the *Attachment* or *Content Version* type of files, you will be able to specify an object with which the files must be associated.

For a type of files to be displayed in the list, it must be backed-up by a backup policy for the organization selected at step 3 of the wizard.

- c. The results will be shown in the table with the columns that match specific Salesforce fields. To choose the displayed information, click **Customize** and select the necessary Salesforce fields on the **Display Fields** tab in the **Data Filters and Display Fields** window.
- 2. Apply additional search conditions using specific filters. To do that, click **Add Condition** on the **Data Filters** tab, select a field and a conditional operator from the drop-down lists, and enter the necessary value.

Veeam Backup for Salesforce suggests a number of in-built conditional operators, such as *contains*, *equals*, *starts with*, *is null* and so on. These operators are used to make queries to databases. Note that the time required to process the request depends on the operator you are using, for example, processing a request with the *equals* operator will take less time than a request with the *contains* operator.

By default, filters are linked by the AND logical operator. That is, a record is displayed in the search results when all specified conditions are met. You can change this behavior by linking filters with different operators. To do this, set the **Use filter logic** toggle to *On*, and specify the filter logic expression using condition ordinal number, brackets and logical operators, for example: 1 AND (2 OR 3) AND NOT 4.

3. Click **Search**. Veeam Backup for Salesforce will show the results satisfying your search parameters in the **Records found** section.

By design, the search results will be displayed on the same pages where the records were originally shown. To make sure that you have seen all the results, look through all the pages.

4. Select the files from the search results displayed in the **Records found** section. Consider that the section displays the maximum number of 500 records per page. You cannot select and add files to the restore session from different pages. That is why it is recommended that you use filters to reduce the number of search results.

For the *Content Version* type of files, you can choose the version of a file that will be restored. To do that, click the link in the **Version** column, compare the latest version of the backed-up file with previous backed-up file versions and the version of the file currently stored in the Salesforce database, and select the necessary version in the **Select Record Version to Restore** window. If you want Veeam Backup for Salesforce to show only files that differ between selected versions, set the **Compare changes** toggle to *On*.

### TIP

You can download up to 10 files to the local machine. To do that, select the necessary items, and click **Download**.

Backup Re	store Browse	(P)RND V Administrator	▼ (⊕) English ▼ (_) (♦) Configuration
Restore File	S restore-job-269213		
Name Organization	Search and select files to restore Use filters to find files and select file vers Search in: Select ot	Data Filters and Display Fields Specify any filters to narrow down your search. Customize a display fields set Data Filters Display Fields	on the second tab. $\hfill \times$
Data	Attachment 🗸 Accoun		
Summary	Search Stop search	Q Available (74)	↑ Move Up ↓ Move Down Selected (4)
		Selected: 1 of 74 Add >	Selected: 0 of 4
	Attachment ID	Account.AccountNumber (Account Number)	Id (Attachment ID)
	There are no records matching your se	Account.AccountSource (Account Source)	SystemModstamp (System Modstamp)
		Account.Active_c (Active)	Name (File Name)
		Account.AnnualRevenue (Annual Revenue)	ContentType (Content Type)
		Account.BillingCity (Billing City)	
		Account.BillingCountry (Billing Country)	
		Account.BillingGeocodeAccuracy (Billing Geoco	
		Account.BillingLatitude (Billing Latitude)	
		Account.BillingLongitude (Billing Longitude)	
		Search Cancel	

## Step 5. Finish Working with Wizard

At the **Summary** step of the wizard, review configured settings and click **Finish**.

If you want Veeam Backup for Salesforce to start restore automatically after you complete the wizard, select the **Start the job after clicking the Finish button** check box. Otherwise, the job draft will be created, and you will have to manually run the job as described in section **Starting and Stopping Restore Jobs**.

### TIP

To view all objects added to the restore session, click the link in the **Object** field.

${\bf e}$	Backup	Rest	ore	Browse		(P)RND	✓ ▲ Administrator ✓	E E	nglish	•	Configuration
$\langle \!$	Restore	e Files	restor	e-job-159064							
Name Organiz	ation		Job Ic Job n Job d	ame:	159064 restore-job-159064 restoring files						^
Data			Conn	ection							
Summa	ry		Sourc Sourc Targe	ce database:	(P)RND - preprod (sandbox) preprod (P)RND - preprod (sandbox)						
			Data								
			Resto Obje	ore type: ct:	Files Total Objects: 2						
			Files								
			Attac	hment:	2						
				Permaner Auto-num	tly deleted objects are restored with different IDs. ber fields will get next sequential value.						
			<b>~</b> 9	Start the job aft	er clicking the Finish button						v
					Previous	Finish	Cancel				

## **Restoring Metadata**

Metadata restore jobs allow you to recover metadata of deleted objects as well as to restore metadata to another organization so that metadata of the object you want to restore matches metadata of the object in the target organization. For example:

- If you want to restore the connected app configuration, restore the *ConnectedApp* metadata file first. For more information, see Salesforce Documentation.
- If you want to restore the session settings, restore the *ProfileSessionSetting* metadata file first. For more information, see Salesforce Documentation.
- If you want to restore the password policies, restore the *ProfilePasswordPolicy* metadata file first. For more information, see Salesforce Documentation.
- Reports and dashboards are also types of metadata that can be restored using this type of restore job.

### IMPORTANT

After you restore the metadata of a deleted Salesforce object, you must perform backup of this object before you start a record restore operation. The backup is required for the object to be displayed at step 4 of the **Restore Records** wizard.

To create a metadata restore job, perform the following steps:

- 1. Launch the Restore Metadata wizard.
- 2. Specify a name and description for the restore job.
- 3. Select Salesforce organizations.
- 4. Select objects whose metadata will be restored.
- 5. Review the restore list.
- 6. Finish working with the wizard.

## Step 1. Launch Restore Metadata Wizard

To launch the **Restore Metadata** wizard:

- 1. Navigate to the **Restore** tab.
- 2. Click New Restore > Metadata.

### NOTE

If you have added multiple companies to Veeam Backup for Salesforce, before you launch the **Restore Metadata** wizard, select the company to which a Salesforce organization whose data you want to restore belongs from the company drop-down list at the top of the page.

For a company to be displayed in the list, it must be added to Veeam Backup for Salesforce beforehand as described in section Adding Companies, and the user must have permissions to access the company. For more information on user permissions, see User Roles and Permissions.

Backup	Restore Brow	vse			(P)RND V	Administrator V	English 🗸	(D) Configuration
Organization: (P)RND	) - ar (sandbox) - testing	ilong 🗸 Filter	by restore job name	٩	Show: All	8 0 2	<b>T</b> Filter (None)	
📤 New Restore 🗸	🗍 Clone 🛛 🦯 E	Edit Draft 🛛 🗙 Delete I	Draft 🕨 Run 🔳	Stop 🧃 Viev	v Details 🛛 🖬 Settings	~		
Records Fields	Туре	Status	Created Date ↓	Start Date	Finish Date	Created By	Modified By	Started By
Files	59 Records	🖸 Draft	5/18/23, 9:46:23	_	_	admin	admin	_
restore-0-15905	58 Metadata	🖸 Draft	5/18/23, 9:35:51	-	-	admin	admin	-
restore-job-15905	57 Metadata	🖸 Draft	5/18/23, 8:29:52	-	_	admin	admin	_
restore-job-15905	66 Records	🖸 Draft	5/18/23, 4:42:02	-	_	admin	admin	_
restore-job-15905	54 Records	🖸 Draft	5/18/23, 3:18:14	-	_	admin	admin	_
restore-job-15860	04 Records	🖸 Draft	5/17/23, 2:01:18	-	_	admin	admin	_
restore-job-15860	01 Fields	🖸 Draft	5/17/23, 1:47:43	-	_	admin	admin	_
restore-job-15805	66 Files	🖸 Draft	5/17/23, 12:29:58	-	_	admin	admin	-
CLONE - restore-j.	Fields	Stopped	5/16/23, 11:42:19	5/16/23, 1:54:35	5/16/23, 1:54:42	admin	admin	admin
restore-job-15310	02 Records	🖸 Draft	5/15/23, 11:34:20	-	_	admin	admin	-
restore-job-15090	06 Records	🖸 Draft	5/15/23, 9:55:06	-	_	admin	admin	_
restore-job-12691	17 Fields	😣 Failed	5/12/23, 7:35:18	5/12/23, 7:35:32	5/12/23, 7:35:59	. admin	admin	admin

## Step 2. Specify Restore Job Info

At the **Name** step of the wizard, use the **Job name** and **Job details or reason for restore** fields to specify a name for the new restore job and to provide a description for future reference.

$(\mathcal{L})$		Restore	Browse		(P)RND ¥	Administrator 🗸		Configuration
$\bigotimes$	Restor	e Metada	ta restore-job-159065					
Name Organiz Data Restore Summa	List	Th Jot Jot	estore Job Name is information will be include o name: estore-job-159065 o details or reason for restore estoring metadata	e restore. It may be he	elpful to reference th	e incoming ticket or work it	2m.	
					Next Ca	ancel		

## Step 3. Select Organization

At the **Organization** step of the wizard, select a Salesforce organization whose metadata you want to restore from the **Restore from** drop-down list. For a Salesforce organization to be displayed in the list, it must belong to the company specified at step 1.

By default, metadata is restored to the same Salesforce organization. However, you can choose to restore metadata to another organization. To do that, select a Salesforce organization to which you want to restore metadata from the **Restore to** drop-down list. For a Salesforce organization to be displayed in the list of available organizations, it must belong to the company specified at step 1 and be compatible with the organization whose metadata you want to restore. This means that you can restore from a production or sandbox organization only to its sandbox copies.

### IMPORTANT

If you plan to restore user profiles to another organization, keep in mind that the same set of objects and fields must exist in the target organization.

tore Browse (P)RND ~ Administrator ~ (D) English ~ (D) & Configuration
tadata restore-job-159065
Select Salesforce Organization
Choose what organization you would like to perform this restore for. Data will be restored back to the same organization. Restore from:
(P)RND - preprod (sandbox)
Restore to:
(P)RND - preprod (sandbox)
(P)RND - ar (sandbox) - testing long name for browse and restore pages
(P)RND - preprod (sandbox)
Previous Next Cancel

## Step 4. Select Metadata to Restore

At the **Data** step of the wizard, you can look through the backed-up data, as well as browse, filter, and choose data that you want to restore. Only metadata objects that have been backed up are displayed at this step.

Some metadata objects may have references to other objects. To restore all metadata objects successfully, you must analyze the relationships between the objects and restore the referenced objects first. This may require executing multiple jobs.

To choose metadata objects for restore:

- 1. From the **Metadata type** drop-down list, select the type of metadata.
- 2. Apply additional search conditions using specific filters. To do that, click **Customize**. In the **Metadata Filters** window, click **Add Condition**, select a field and a conditional operator from the drop-down lists, and enter the necessary value.

Veeam Backup for Salesforce suggests a number of in-built conditional operators, such as *contains*, *equals*, *starts with*, *is null* and so on. These operators are used to make queries to databases. Note that the time required to process the request depends on the operator you are using, for example, processing a request with the *equals* operator will take less time than a request with the *contains* operator.

By default, filters are linked by the AND logical operator. That is, a record is displayed in the search results when all specified conditions are met. You can change this behavior by linking filters with different operators. To do this, set the **Use filter logic** toggle to *On*, and specify the filter logic expression using condition ordinal number, brackets and logical operators, for example: 1 AND (2 OR 3) AND NOT 4.

3. Click **Search**. Veeam Backup for Salesforce will show the results satisfying your search parameters in the **Objects found** section.

By design, the search results will be displayed on the same pages where the records were originally shown. To make sure that you have seen all the results, look through all the pages.

- 4. Choose the files from the search results displayed in the **Objects found** section:
  - a. Select check boxes next to the metadata files that you want to restore.
  - b. To choose the version of a metadata file that will be restored, click the link in the **Version** column, and in the **Choose Metadata Version to Restore** window, compare the latest version of the backed-up metadata file with previous backed-up file versions and the version of the file currently stored in the Salesforce database, and select the necessary version.

#### **IMPORTANT**

If you are restoring a removed metadata object, make sure that you choose the previous correct version of the file. By default, files are restored to the latest version.

Consider the following:

- By default, you can download up to 100 metadata files to the local machine. To do that, select the necessary objects, and click **Download**.
- For metadata of custom objects that was permanently deleted from Salesforce, you must restore metadata of the following types: *CustomObject, CustomTab, Layout* and *Profile.* While selecting user profiles, you can choose only those profiles that had access to this object.

Backup Re	store Browse			Administrator 🗸 🌐 English 🖌 💭	)
Restore Me	tadata restore-	job-1025057			
Name		oose Metadata Version To Restore mpare versions of metadata and choose the best version to restore			×
Organization		sion to restore: ← → Latest (10/20/22, 5:58:32 PM) ✓ Ψ	Down	load	
Data	All metadata	Preview Compare			Combined View
Restore List Summary		ompare with:	Versi	on to restore:	
Summary	Search	Production ● 9/1/22, 10:40:59 PM		t (10/20/22, 5:58:32 PM)	
		<pre>1 <?xml version="1.0" encoding="UTF-8"?><profile xmlns="h ttp://soap.sforce.com/2006/04/metadata"> 2 <custom>true</custom>true<td></td><td><?xml version='1.0' encoding='UTF-8'? <profile></profile></td><td>&gt;</td></profile></pre>		xml version='1.0' encoding='UTF-8'?<br <profile></profile>	>
		<pre>3 <userlicense>Guest User License</userlicense> 4 <applicationvisibilities></applicationvisibilities></pre>	3	<pre><custom>true</custom> <userlicense>Guest User License</userlicense></pre>	erLicense>
		<pre>5 <application>AFXIConga4_CongaMergen&gt; 6 <default>false</default></application></pre>	5	<applicationvisibilities></applicationvisibilities>	de/(application)
		<pre>7 <visible>false</visible> 8 </pre>	7	<pre><default>false</default> <visible>false</visible></pre>	ge(/approabion/
		9 <applicationvisibilities></applicationvisibilities>	9		•
		Apply Cancel			

#### TIP

## Step 5. Review Restore List

At the **Restore List** step, review the list of items that you want to restore and proceed with the wizard.

### TIP

You can download up to 100 metadata files to the local machine. To do that, select the necessary objects and click **Download**.

Backup	Restore Browse		(P)RND 🗸	) Administrator 🗸	English 🖌 💭 🔅 Con	figuration
Restore I	Metadata restore-job-159065					
Name	Restore list (2 items) These metadata records will be	restored				
Organization	Search on this page	Q X Remove	👱 Download			
Restore List	🗸 Туре	Version	API Name	Name	Last Modified Date	Created
	Selected: 2 of 2					
Summary	✓ 🗜 Role	Latest	even_girl_AQAPartnerUser	null	5/19/23, 2:14:26 AM	5/19/23
	🖌 🗜 Role	Latest	concrete_meal_AQAPartn	null	5/19/23, 2:14:26 AM	5/19/23
		PI	revious Next Cancel	I		

## Step 6. Finish Working with Wizard

At the **Summary** step of the wizard, review configured settings and click **Finish**.

If you want Veeam Backup for Salesforce to start restore automatically after you complete the wizard, select the **Start the job after clicking the Finish button** check box. Otherwise, the job draft will be created, and you will have to manually run the job as described in section **Starting and Stopping Restore Jobs**.

### TIP

To view all objects added to the restore session, click the link in the **Object** field.

As soon as you start the restore job, you can see the status of the job both in the Veeam Backup for Salesforce Web UI and in Salesforce. Consider that if you have any other running deploy sessions in Salesforce, the restore job may fail with an error indicating that another deploy is in progress. Wait until other sessions complete, and start the restore job again.

Backup Res	tore Browse		(P)RND ~	Administrator 🗸		Configuration
Restore Me	tadata restore-job-1	59065				
Name Organization	Summary Restore job configu	ration is complete. You can browse back to adjust the	e scope and parameters	of restore.		
Dete	Summary					
Data Restore List	Job ld: Job name: Job details:	159065 restore-job-159065 restoring metadata				
Summary	Connection					
	Source: Source database: Target:	(P)RND - preprod (sandbox) preprod (P)RND - preprod (sandbox)				
	Data Restore type: Object: Permane Auto-nur	Metadata 3 ntly deleted objects are restored with different IDs. nber fields will get next sequential value.				
		Previous	Finish	ancel		

# Starting and Stopping Restore Jobs

You can start a restore job automatically right after you finish the restore job configuration wizard or manually on the **Restore** tab. Consider that after you start the restore job, it cannot be edited or removed anymore. You can only view the job details. However, you can clone this job after the job completes, and then edit it, for example, to create a new draft or to see the list of the restored objects. To learn how to clone and edit restore jobs, see Cloning and Editing Restore Jobs.

To start a restore job:

- 1. Navigate to the **Restore** tab.
- 2. From the **Organization** drop-down list, select a Salesforce organization for which the restore job has been created.
- 3. Select the necessary job.

### NOTE

You can filter restore jobs displayed on the **Restore** tab by using the icons in the **Show** field at the top of the list. If you set a filter, the settings apply to all companies and do not change during the current user session. That is why if you do not see the necessary job in the list, make sure that the **All** filter is set.

4. Click Run.

### **Stopping Restore Jobs**

You can stop a running restore job. However, it is not recommended that you do that, as it may result in data inconsistency. Consider that you cannot further edit, start or remove the stopped job.

	_	• • •						
New Restore 💙	Clone 🖌	nelete 🗙 Delete	2 Draft   P <u>Run</u>	Stop 🥇 Vi	ew Details 🦳 🧏 Settings	<b>*</b>		
Job Name	Туре	Status	Created Date ↓	Start Date	Finish Date	Created By	Modified By	Started By
ected: 1 of 26								
restore-job-159059	Records	Draft	5/18/23, 9:46:23	-	-	admin	admin	-
restore-job-159058	Metadata	🔯 Draft	5/18/23, 9:35:51	-	-	admin	admin	-
restore-job-159057	Metadata	🔯 Draft	5/18/23, 8:29:52	_	_	admin	admin	_
restore-job-159056	Records	🔯 Draft	5/18/23, 4:42:02	_	_	admin	admin	_
restore-job-159054	Records	🖸 Draft	5/18/23, 3:18:14	-	_	admin	admin	_
restore-job-158604	Records	🔯 Draft	5/17/23, 2:01:18	-	_	admin	admin	-
restore-job-158601	Fields	🔯 Draft	5/17/23, 1:47:43	-	_	admin	admin	-
restore-job-158056	Files	🔯 Draft	5/17/23, 12:29:58	-	_	admin	admin	-
restore-job-158056	Files	🖸 Draft	5/17/23, 12:29:58	-	-	admin	admin	_

# Cloning and Editing Restore Jobs

You can clone a restore job if you want to launch it again or to create a new job based on the settings of the existing one.

### IMPORTANT

You cannot clone a running restore job.

To clone a restore job:

- 1. Navigate to the **Restore** tab.
- 2. From the **Organization** drop-down list, select a Salesforce organization for which the restore job has been created.
- 3. Select the necessary restore job.

### NOTE

You can filter restore jobs displayed on the **Restore** tab by using the icons in the **Show** field at the top of the list. If you set a filter, the settings apply to all companies and do not change during the current user session. That is why if you do not see the necessary job in the list, make sure that the **All** filter is set.

- 4. Click Clone.
- 5. In the **Clone Restore Job** window, specify a name for the new job, and click **Clone**.

After you clone the restore job, you can edit settings of the new draft.

${\bf B}$	Backup Re	estore	Browse			(P)RND ~	💄 Administrator 🗸	English 🗸	(D) Configuration
Orga	nization: (P)RND - a	r (sandbox) - te	esting long V		Q Sho	w: All 😋 🛦 🤇		<b>T</b> Filter (None)	
<b>1</b>	lew Restore 🐱	Clone	🧪 Edit Draft 🛛 🗙 Delete Di	aft 🕨 🕨 Run 🔳	Stop i View Det	ails 🛛 👫 Settings 🔊	•		
✓	Job Name	Туре	Status	Created Date ↓	Start Date	Finish Date	Created By	Modified By	Started By
Selec	ted: 1 of 26								
	restore-job-159059	Records	🔯 Draft	5/18/23, 9:46:23	-	-	admin	admin	-
✓	restore-job-159058	Metadata	🖸 Draft	5/18/23, 9:35:51	-	-	admin	admin	-
	restore-job-159057	Metadata	🔯 Draft	Clone Restore Job			× Imin	admin	-
	restore-job-159056	Records	🔯 Draft	You may set custom	name for the cloned jo	b.	lmin	admin	-
	restore-job-159054	Records	🖸 Draft				Imin	admin	-
	restore-job-158604	Records	🖸 Draft	New name: CLONE	restore-job-159058		Imin	admin	-
	restore-job-158601	Fields	🖸 Draft				Imin	admin	-
	restore-job-158056	Files	🔯 Draft			Clone Cance	l Imin	admin	-
	CLONE - restore-j	Fields	Stopped	5/16/23, 11:42:19	5/16/23, 1:54:35	5/16/23, 1:54:42	admin	admin	admin
	restore-job-153102	Records	🔯 Draft	5/15/23, 11:34:20	-	-	admin	admin	-

## **Editing Restore Jobs**

You can edit restore jobs created in Veeam Backup for Salesforce that were not launched yet and have the *Draft* status. For example, you may want to modify some settings specified in a restore job, change the chosen object and fields, and so on.

To edit restore job settings, do the following:

- 1. Navigate to the **Restore** tab.
- 2. From the **Organization** drop-down list, select a Salesforce organization for which the restore job has been created.
- 3. Select the necessary restore job.

### NOTE

You can filter restore jobs displayed on the **Restore** tab by using the icons in the **Show** field at the top of the list. If you set a filter, the settings apply to all companies and do not change during the current user session. That is why if you do not see the necessary job in the list, make sure that the **All** filter is set.

- 4. Click Edit Draft. The restore job wizard will open.
- 5. Edit the job settings as described in sections Restoring Records, Restoring Field Values, Restoring Files or Restoring Metadata.

Backup Restore				TEST-VEEAM 🗸 🔺 Adr	ninistrator 🗸 📔 🥳 Configurati
Organization: Veeam (production)	► Filter b	by restore job name	Q Show: All 🥥	<u>A</u> O D	Filter (None)
New Restore 🗍 Clone 🔥	idit Draft 🛛 🗙 Delete Draft	🕨 Run 🔳 Stop	<b>į</b> View Details		
Job Name	Туре	Status	Created Date ↓	Start Date	Finish Date
Selected: 1 of 10					
restore-job-906453	Records	🖸 Draft	9/7/22, 5:26:23 PM	-	-
✓ restore-job-903703	Records	🖸 Draft	9/6/22, 1:25:24 PM	-	-
restore-job-902305	Records	Success	9/6/22, 9:29:25 AM	9/6/22, 9:30:18 AM	9/6/22, 9:30:27 AM
CLONE - restore-job-817901	Metadata	Success	9/2/22, 4:00:42 PM	9/2/22, 4:01:19 PM	9/2/22, 4:01:33 PM
POLIMIRPH CLONE - restore-job	Metadata	Success	9/2/22, 3:32:21 PM	9/2/22, 3:34:45 PM	9/2/22, 3:34:53 PM
ANOTHER CLONE - restore-job-8	Metadata	Success	9/2/22, 2:58:16 PM	9/2/22, 3:31:18 PM	9/2/22, 3:31:32 PM
CLONE - restore-job-817901	Records	Success	9/2/22, 11:51:24 AM	9/2/22, 2:41:22 PM	9/2/22, 2:41:24 PM
restore-job-836851	Records	Success	8/18/22, 11:46:03 AM	8/19/22, 5:51:15 PM	8/19/22, 5:51:16 PM
restore-job-825503	Records	Success	8/8/22, 1:58:26 PM	8/8/22, 2:49:16 PM	8/8/22, 2:49:17 PM
restore-job-817901	Records	Success	8/2/22, 12:53:37 PM	8/2/22, 12:55:13 PM	8/2/22, 12:55:15 PM

# Removing Restore Job Drafts

You can manually remove a draft of a restore job that is no longer needed. However, you cannot remove restore jobs that have been already launched.

To remove a restore job draft:

- 1. Navigate to the **Restore** tab.
- 2. From the **Organization** drop-down list, select a Salesforce organization for which the restore job has been created.
- 3. Select the necessary restore job with the *Draft* status.

### NOTE

You can filter restore jobs displayed on the **Restore** tab by using the icons in the **Show** field at the top of the list. If you set a filter, the settings apply to all companies and do not change during the current user session. That is why if you do not see the necessary job in the list, make sure that the **All** filter is set.

- 4. Click Delete Draft.
- 5. In the **Confirmation** window, click **Remove** to acknowledge the operation.

Backup R	estore	Browse			(P)RND V	Administrator V	English 🗸	Configuration
Organization: (P)RND - a	ar (sandbox) - te	esting long 👻		Q	Show: All 🔮 🛕	80	T Filter (None)	
📤 New Restore 🗸	Clone	🧨 Edit Draft 🛛 🗙 Delete D	raft 🕨 Run 🔳	Stop   🧵	View Details 🛛 😹 Settings	~		
Job Name	Туре	Status	Created Date ↓	Start Date	Finish Date	Created By	Modified By	Started By
Selected: 1 of 26								
restore-job-159059	Records	🖸 Draft	5/18/23, 9:46:23	-	-	admin	admin	-
✓ restore-job-159058	Metadata	Draft	5/18/23 9:35:51	_	_	admin	admin	-
restore-job-159057	Metadata	🚺 Draft	Confirmation			min	admin	-
restore-job-159056	Records	🖸 Draft	Are you sure	you want to rem	ove this job?	min	admin	-
restore-job-159054	Records	🖸 Draft	_			min	admin	-
restore-job-158604	Records	🖸 Draft			Remove Car	min	admin	-
restore-job-158601	Fields	🖸 Draft			J	min	admin	-
restore-job-158056	Files	🖸 Draft	5/17/23, 12:29:58	-	-	admin	admin	-

# **Configuring Restore Mapping Settings**

You can configure restore mapping settings for a specific organization if it is protected by a backup policy. These settings will be applied to all restore jobs launched for this organization.

## Object Mapping by Record IDs

When restoring a record that was deleted from the Salesforce database, Veeam Backup for Salesforce creates a new record in Salesforce, assigns a new ID to this record and populates its fields with the values of the record saved in the backup file. To associate the newly created record with the backed-up record, the product creates in its organization database a default rule that maps the ID of the backed-up record with the ID of the record created in Salesforce. In addition to the default rule, you can create custom object mapping rules, for example, if you want to restore the deleted record data to an existing Salesforce record.

To create a custom rule, do the following:

- 1. Navigate to the **Restore** tab.
- 2. From the **Organization** drop-down list, select a Salesforce organization for which you want to create the rule.
- 3. Click Settings > Object IDs Mapping.
- 4. In the **Restore Setting: Object IDs Mapping** window, do the following:
  - a. On the Add Mapping tab, specify the ID of the record saved in the backup file and the ID of the existing Salesforce record, and click Add Mapping.
  - b. To save the configured mapping settings, click Save.

### TIP

To find a mapping rule created for a record, switch to the **Find Mapping** tab, specify the ID of the record saved in the backup file, the ID of the existing Salesforce record or both, and click **Find Existing Mapping**.

Backup	Restore Browse Restore Setting: Object IDs Maj		📺 Veeam 🗸 🌔	) Administrator 🗸 🌘 English	Configuration
Organization: Veeam	View and fine-tune Saleforce ID ma				None)
📤 New Restore 🗸	Add Mapping Find M	apping			
Job Name	Original ID 0018CKx000KxFrWQAV	New ID 0018C00180I3PPiQAN	+ Add Mapping		Started By
Selected: 0 of 48 WO69 (overwrite)	Account	Account			admin
WO69	Object	Original ID	New ID	Action	admin
CLONE - Fresh	Account	0000C00000I3PPiQAN	0018C000000FrWQAV	X Remove	admin
CLONE - Fresh					admin
Fresh ContentV					admin
Fresh ContentV					admin
CLONE - CLONE					admin
CLONE - restore					admin
restore-job-113					admin
restore-job-113					admin
restore-job-105					admin
CLONE - CLONE					admin
CLONE - restore					admin
restore-job-105					admin
restore-job-100				Save Can	admin
CLONE - restore	Records Success	5/28/23, 2:24:47 5/2	28/23, 2:24:50 5/28/23, 2:24:57	. admin admin	admin 🗸

## Mapping by Alternate Keys

When restoring a Salesforce record, Veeam Backup for Salesforce checks whether the record already exists in the target Salesforce database. By default, the product uses the ID of the record saved in the backup file to search for the record. However, you can add an alternate key and instruct Veeam Backup for Salesforce to use this key instead of the record ID, that is, define a record field with a unique value that will be used to identify the restored record in case the product fails to find it by the record ID. For example, you can create a mapping rule and instruct the product to use the phone number or email field instead of the default record ID.

To add an alternate key, do the following:

- 1. Navigate to the **Restore** tab.
- 2. From the **Organization** drop-down list, select a Salesforce organization for which you want to add the alternate key.
- 3. Click Settings > Alternate Keys.
- 4. In the **Restore Setting: Alternate Keys for Objects** window, do the following:
  - a. Choose an object for which you want to configure mapping.
  - b. Choose a field that will be used for mapping instead of the default record ID. The field must be unique for the selected object.
  - c. Click Add Alternate Key.
  - d. To save the configured settings, click Save.

### NOTE

Consider the following:

- If you want to override values of specific fields or configure mapping by field when restoring a record, keep in mind that these settings will be applied first.
- When a record is restored using an alternate key, a new object mapping rule is created. The object mapping rule will further be used to restore this record since object mapping by ID always prevails over alternate key mapping.

Backup Re	store Browse Restore Setting: Alternate Keys F	(開) Veeam 🗸 (重) Administrator 🗸 (係)	) English v () Configuration
Organization: Veeam - m	Object	Field	None)
🏠 New Restore 🗸	Account (Account)	AccountNumber (Account Number)	dd Alternate Key
Job Name	Filter by text Q	X Remove Alternate Key	Started By
Selected: 0 of 48	Object 1	Field	
WO69 (overwrite)	Selected: 0 of 1		admin
WO69			admin
CLONE - Fresh	Group	DeveloperName	admin
CLONE - Fresh			admin
Fresh ContentV			admin
Fresh ContentV			admin
CLONE - CLONE			admin
CLONE - restore			admin
restore-job-113			admin
restore-job-113			admin
restore-job-105			admin
CLONE - CLONE			admin
CLONE - restore			admin
restore-job-105			admin
restore-job-100		Save	Cancel admin
CLONE - restore	Records Success	5/28/23, 2:24:47 5/28/23, 2:24:50 5/28/23, 2:24:57 admin	admin admin 🗸

# Viewing Restore Job Details

Veeam Backup for Salesforce displays all restore jobs and restore job drafts on the **Restore** tab. After you run a restore job, it cannot be edited or removed anymore. Users can only view the job details and restore session statistics. Users assigned any role can see information on restore jobs created for Salesforce organizations which data they have access to.

### NOTE

You can filter restore jobs displayed on the **Restore** tab by using the icons in the **Show** field at the top of the list. If you set a filter, the settings apply to all companies and do not change during the current user session. That is why if you do not see a restore job in the list, make sure that the **All** filter is set.

To view settings configured for a specific restore job:

- 1. Select the necessary restore job policy.
- 2. Click View Details.

The Restore Job Details window will open.

Backup Restore	Browse	🔛 Veeam 🗸 🚺 Administrator 🖌 🌐 English	(D) 🔅 Configuration
	Restore Job Details	×	
Organization: qqq - partial (san	Summary		Filter (None)
New Restore     Clone     Job Name	Job ld: Job name: Job details:	968102 restore-job-968102 —	sh Date
Selected: 1 of 39	Connection		
restore-job-1025057 restore-job-1025054 restore-job-1013159	Source: Source database: Target:	Kera - partial (sandbox) kera 1605 Kera - partial (sandbox) / vbsf@org.com.kera	26/22, 10:09:13 PM
restore-job-1009502	Data		
restore-job-1007151 restore-job-1006351 restore-job-1002804	Restore type: All records: Object:	Records No ShiftShare (Total Objects: 1)	
restore-job-1000704	Files		
restore-job-1000702	Restore Attachments:	No	14/22, 3:47:40 PM
restore-job-999552	Hierarchy		
restore-job-968104-mt1	Child hierarchy:	No	0/22, 12:08:41 PM
CLONE - restore-job-954811	Parent hierarchy:	Do not restore	0/22, 12:09:38 PM
restore-job-968102	Update child records:	Parent lookup only	0/22, 11:52:06 AM
restore-job-968101		Close	0/22, 11:50:01 AM
CLONE - restore-job-961103	Records		7/22, 8:41:06 PM

## Viewing Restore Sessions

For each performed restore job, Veeam Backup for Salesforce starts a new session and stores its records in the configuration database. You can track real-time statistics of all running and completed operations from the **Restore** tab. To view the full list of tasks executed during an operation, click the link in the **Status** column. The restore session page will open.

On the restore session page, Veeam Backup for Salesforce displays only Salesforce records that have been processed during the restore session. The records are grouped by every Salesforce batch, that is why one object may appear on the page multiple times. Consider that the results shown in the **Result** column are limited due to performance reasons. To see the full results, download the restore session logs – the logs will be collected and saved to the default download folder on the local machine in a single log.zip archive.

Backup Restore	Browse	(🔚) Veeam 🗸 🔹 Administr	rator 🗸 💮 English	<ul> <li>✓</li> <li>✓</li></ul>
estore-job-556	Instance: production			
Name: restore-job-556 Type: Records Status: Success Status: 13 sec	pp			
Object	Q Show:	All 🛛 🔇 💿		👱 Download Logs
Object	Status	Result	Start Time ↓	End Time DDD
Attachment	Success	Attachment with new Id 00P7Q000000r02BUAQ was updated, old Id: 00P7Q	11/2/22, 3:49:18 PM	11/2/22, 3:49:21 PM
ContentVersion	Success	ContentVersion with new Id 0687Q000005BQ7LQAW was created, old Id: 06	11/2/22, 3:49:15 PM	11/2/22, 3:49:18 PM
Contact	Success	Contact with new Id 0037Q00000JgPHJQA3 was updated, old Id: 0037Q00000	11/2/22, 3:49:14 PM	11/2/22, 3:49:15 PM
Case	Success	🗇 Case with new Id 5007Q00000ED6wCQAT was updated, old Id: 5007Q00000E	11/2/22, 3:49:13 PM	11/2/22, 3:49:14 PM
ContentDocumentLink	Success	ContentDocumentLink with new Id 06A7Q000004pXeiUAE was updated, old I	11/2/22, 3:49:13 PM	11/2/22, 3:49:13 PM
Entitlement	Success	🗇 Entitlement with new Id 5507Q000003lfJDQAY was updated, old Id: 5507Q00	11/2/22, 3:49:12 PM	11/2/22, 3:49:13 PM
Event	Success	Event with new Id 00U7Q000001iykUUAQ was updated, old Id: 00U7Q00000	11/2/22, 3:49:12 PM	11/2/22, 3:49:12 PM
Opportunity	Success	Deportunity with new Id 0067Q000009UGj1QAG was updated, old Id: 0067Q	11/2/22, 3:49:11 PM	11/2/22, 3:49:12 PM
FeedComment	Success	🗇 FeedComment with new Id 0D77Q000000p3B2SAI was updated, old Id: 0D77	11/2/22, 3:49:11 PM	11/2/22, 3:49:11 PM
FeedItem	Success	FeedItem with new Id 0D57Q00000eZpkhSAC was updated, old Id: 0D57Q00	11/2/22, 3:49:10 PM	11/2/22, 3:49:11 PM
reconcern	Success			
Task	Success	Task with new Id 00T7Q0000Uns9RUAR was updated, old Id: 00T7Q00000U	11/2/22, 3:49:10 PM	11/2/22, 3:49:10 PM

# Updating Veeam Backup for Salesforce

Veeam Backup for Salesforce allows you to check for new product versions and available package updates, download and install them right from the Web UI.

To view the product details:

- 1. Switch to the **Configuration** page.
- 2. Navigate to About.

The **About** section displays the following information:

- **Build version** the currently installed version of Veeam Backup for Salesforce.
- **Management Console version** the currently installed version of the Management Console service.
- **Restore module version** the currently installed version of the Veeam restore service.
- Backup module version the currently installed version of the Veeam backup service.
- Instance ID the unique identification number of the default protected Salesforce organization.

It is recommended that you timely install available updates to avoid performance issues while working with the product. For example, timely installed security updates may help you prevent potential security issues and reduce the risk of compromising sensitive data.

### In This Section

- Upgrading Veeam Backup for Salesforce
- Checking for Updates
- Installing Updates
- Viewing Updates History

# Upgrading Veeam Backup for Salesforce

You can upgrade from Veeam Backup for Salesforce 1.0 to Veeam Backup for Salesforce 2.0 using the Veeam updater service as described in section Installing Updates. Veeam Backup for Salesforce will automatically notify you about the newly released product version.

After you upgrade to Veeam Backup for Salesforce 2.0, consider the following:

- If the management server is running the CentOS 7, Oracle Linux 7 or RedHat Linux 7 operating system, you must reboot the server after the upgrade process completes. To do that, you can either select the **Reboot automatically after install if required** check box on the Veeam Updater page or run the sudo systemctl restart veeam-updater command from the server console.
- The domain name or IP address of the management server displayed on the About > Advanced Settings tab of the Configuration page must match the Callback URL specified in the Connected App settings. To change the domain name or IP address, modify the backend.domain parameter value. For more information on the advanced settings, see Configuring Advanced Settings.
- Veeam Backup for Salesforce 2.0 supports API version 57.0, while Veeam Backup for Salesforce 1.0 supported API version 55.0. The API version is automatically updated upon the product upgrade. To see the supported API version, check the sf.api.version parameter value as described in section Configuring Advanced Settings.
- If you have previously added a Salesforce Sandbox organization to Veeam Backup for Salesforce 1.0 but no backups have been created for this organization yet, you must delete this organization from Veeam Backup for Salesforce 2.0 and add it again. Otherwise, the product will fail to reauthorize the connection to the organization.
- If you previously did not have the product installed, Veeam Backup for Salesforce 2.0 will store backed-up data in the /opt/vbsf/data folder. However, if you upgrade from version 1.0 to 2.0, Veeam Backup for Salesforce will store the data in the folder that has already been used in version 1.0 that is, the /opt/vbsf/vbsf-backup/data folder. If you want to change the folder after upgrading the product, modify the data.storage.location parameter value as described in section Configuring Advanced Settings.

For more information on the issues that you may encounter while upgrading the product, see the Veeam Backup for Salesforce Release Notes.

# Checking for Updates

Veeam Backup for Salesforce automatically notifies you about newly released product versions and package updates available for the operating system running on the Veeam Backup for Salesforce server. However, you can check for available updates manually if required:

- 1. Switch to the **Configuration** page.
- 2. Navigate to About.
- 3. In the **Product updates** section, click **Check for Updates**.

If new updates are available, they will be displayed on the **Updates** tab of the **Veeam Updater** page. To view detailed information on an update, select the check box next to the update and click **What's new?**.

Backup Res	estore Browse	Administrator 🗸 🖨 English 🖌 💭
Exit Configuration	About Advanced Settings	
Application Salesforce Susers and Roles Security Alerts License About	Build version:       2.0.2.1992         Management Console version:       2.0.2.671         Restore module version:       2.0.2.326         Backup module version:       2.0.2.9624         Instance ID:       9d00c799-b5t1-66d7a-1yrt-345gt6u890oo         Support       You can open a technical support case and attach logs using the wizard.            ✓ Download Logs	
	Product updates Check for any available product updates. Check for Updates	

# Installing Updates

Use the Veeam updater service to download and install new product versions and available package updates . You can also set a reminder to send update notifications

### IMPORTANT

Veeam Backup for Salesforce does not allow you to schedule the update installation as it may cause interrupting of running activities, which may result in unpredictable data loss. It is recommended that you make sure that all backup policies are disabled and restore jobs are finished before you install a product update.

## Installing Updates

To download and install available product and package updates:

- 1. Open the Veeam Updater page. To do that:
  - a. Switch to the **Configuration** page.
  - b. Navigate to About.
  - c. In the **Product updates** section, click **Check for Updates**.
- 2. On the Veeam Updater page, do the following:
  - a. In the **Updates are available for this system** section, select check boxes next to the necessary updates.
  - b. In the **Choose action** section, select the **Install updates now** option, select the **Reboot automatically after install if required** check box to allow Veeam Backup for Salesforce to reboot the server if needed, and then click **Install Updates Now**.

Veeam Backup for Salesforce will download and install the updates; the results of the installation process will be displayed on the **History** tab. Keep in mind that it may take several minutes for the installation process to complete.

### NOTE

When installing product updates, Veeam Backup for Salesforce restarts all services running on the management server, including the Web UI service. That is why Veeam Backup for Salesforce will log you out when the update process completes.

## Setting Update Reminder

If you have not decided when to install updates, you can set an update reminder — instruct Veeam Backup for Salesforce to send an update notification later.

To do that, on the **Veeam Updater** page, in the **Choose action** section, do the following:

1. Select the **Remind me later** option and choose when you want to receive the reminder.

If you select the **Next Week** option, Veeam Backup for Salesforce will send the reminder in 7 days.

2. Click **Remind me later**.

/I GMT+2
7.0.0.810

# Viewing Updates History

To see the results of the update installation performed on the management server, do the following:

- 1. Switch to the **Configuration** page.
- 2. Navigate to About.
- 3. In the Product updates section, click Check for Updates.
- 4. On the Veeam Updater page, switch to the History tab.

For each date when an update was installed, **Veeam Updater** will display the name of the update and its status (whether the installation process completed successfully, completed with warnings or failed to complete).

To download logs for the installed updates, select the necessary date in the **Date** section, and click **View Full Log**. Veeam Backup for Salesforce will save the logs as a single file to the default download directory on the local machine.

💭 Veeam Updater		September 19, 2023 at 03:56 PM GMT+4
Updates History		v. 7.0.0.810
Update sessions history	View Full Log	
Date †	Package	Status
September 19, 2023 at 12:41 PM	Preparing for the update operation	Success
	Veeam Backup for Salesforce (2.0.0-3955.el7)	Success
	Update operation has been completed	Success

# Getting Technical Support

If you have any questions or issues with Veeam Backup for Salesforce, you can search for a resolution on Veeam R&D Forums or submit a support case in the Veeam Customer Support Portal.

When you submit a support case, it is recommended that you provide the Veeam Customer Support Team with the following information:

- Version information for the product and its infrastructure components
- The error message or an accurate description of the problem you are facing
- Log files

## **Opening Support Case**

To open a support case:

- 1. Switch to the **Configuration** page.
- 2. Navigate to About.
- 3. In the Support section, click Open Support Case.

### NOTE

It is recommended that you open only support cases related to the Veeam Backup for Salesforce specific issues from the Web UI. For general and license issues, use the Veeam Customer Support Portal.

	ıp Res	tore Browse		Administrator 🗸	English 🗸	
Exit Cor	nfiguration	About Advanced S	ettings			
Application Salesforce Users and Security Alerts		Build version: Management Console version: Restore module version: Backup module version: Instance ID:	2.0.2.1992 2.0.2.671 2.0.2.326 2.0.2.9624 9d00c799-b5t1-66d7a-1yrt-345gt6u890oo			
<ul><li>License</li><li>About</li></ul>			t case and attach logs using the wizard. In Support Case			
		Product updates Check for any available product of Check for Updates	updates.			

## Downloading Product Logs

To download the product logs, do the following:

- 1. Switch to the **Configuration** page.
- 2. Navigate to About.
- 3. In the **Support** section, click **Download Logs**.
- 4. In the **Download Logs** window, specify a time interval for which logs must be collected:
  - Select the Collect logs for the last option if you want to collect data for a specific number of days in the past.
  - Select the Collect logs for the specified time period option if you want to collect data for a specific period of time in the past.

#### 4. Click Download.

Veeam Backup for Salesforce will collect logs for the specified time interval and save them to the default download folder on the local machine in a single log.zip archive.

### NOTE

Product logs are available only to users with the *Administrator* role assigned. However, all users can download backup or restore session logs. To learn how to download these logs, see sections Viewing Policy Sessions and Viewing Restore Sessions.

ß	) Backup Res	Restore Browse	) Administrator 🗸 🛛 🌐 English	•					
Œ	- Exit Configuration	About Advanced Settings							
Application		Build version:     2.0.2.1992       Management Console version:     2.0.2.671							
	Salesforce	Restore module ver Download Logs							
2	Users and Roles	Backup module ver Instance ID: Download logs for the specified time period							
Ø	Security	Instance ID:							
P	Alerts	Collect logs for the last: 7 Collect logs for the last: 7							
Q	License	Support							
×	About	You can open a tect Collect logs for the specified time period from: 5/9/23 to: 5/16/23							
		👱 Download Logs							
		Download							
		Product updates							
		Check for any available product updates.	Check for any available product updates.						
		Check for Updates							

# Appendices

See in this section:

- Appendix A. Unsupported Objects
- Appendix B. Replacing Security Certificate

## Appendix A. Unsupported Objects

Veeam Backup for Salesforce supports backup of objects available in API version 57 and earlier. However, most of the objects that cannot be restored are not collected. You can tell these objects in Salesforce by the following flags assigned: *creatable = false, updatable = false.* The only exception is that backup of the **\*History** objects is supported. For more information on backup and restore limitations, see Considerations and Limitations.

Additionally, Veeam Backup for Salesforce does not support backup of the following Salesforce objects:

- \*\_b
- \*\_ViewStat
- \*\_VoteStat
- \*\_X
- \*\_hd
- \*\_ChangeEvent
- \*\_VersionHistory
- \*Event
- \*EventStream
- \*Feed
- AccountUserTerritory2View
- ActivityMetric
- ActivityMetricRollup
- AggregateResult
- AnalyticsBotSession
- AnlytDataAssetEventStore
- ApexEmailNotification
- ApexPageInfo
- ApexTestQueueItem
- ApexTestResult
- ApexTestResultLimits

- ApexTestRunResult
- ApexTestSuite
- AppTabMember
- AuraDefinitionInfo
- BackgroundOperationResult
- BotAnalytics
- BotEventLog
- BulkApiResultEventStore
- CleanDataService
- CollaborationGroupRecord
- ColorDefinition
- ContentFolderItem
- ContentFolderMember
- ContentHubItem
- DatacloudAddress
- DatacloudCompany
- DatacloudContact
- DatacloudDandBCompany
- DatacloudSocialHandle
- DataStatistics
- DataType
- DcSocialProfile
- DcSocialProfileHandle
- EmbeddedServiceLabel
- EngagementHistory
- EntityDefinition
- EntityParticle
- FieldDefinition
- FieldHistoryArchive
- FlexQueueItem
- FlowDefinitionView
- FlowVariableView
- FlowVersionView

- IconDefinition
- Idea
- IdeaComment
- IdeaReputation
- IdeaReputationLevel
- IdeaTheme
- InstalledPackage
- InterfaceFieldMapping
- ListViewChartInstance
- ManagedCintentType
- NetworkUserHistoryRecent
- OauthToken
- OmniRoutingEventStore
- OutgoingEmail
- OutgoingEmailRelation
- OwnerChangeOptionInfo
- PermissionSetEventS
- PicklistValueInfo
- PlatformAction
- RecentlyViewed
- RecordActionHistory
- RecordRecommendation
- RecordVisibility
- Regular\_articles\_kav
- RelationshipDomain
- RelationshipInfo
- SalesStore
- SearchLayout
- SiteDetail
- SubscriberPackage
- TenantUsageEntitlement
- UserAppMenuItem
- UserEmailCalendarSync

- UserEntityAccess
- UserFieldAccess
- UserProfileFeed
- UserRecordAccess
- Vote

# Appendix B. Replacing Security Certificate

When you install Veeam Backup for Salesforce, it automatically generates a default self-signed certificate. You can replace this default certificate with your own self-signed certificate or with a certificate obtained from a Certificate Authority (CA).

The /etc/nginx/certs default SSL configuration file contains paths to the following certificate files:

- ssl\_certificate "/opt/vbsf/nginx/certificate/vbsf.crt" a file that contains the self-signed
  certificate.
- ssl\_certificate\_key "/opt/vbsf/nginx/certificate/vbsf.key" a file that contains a private key
  used to generate the certificate.
- ssl\_password\_file "/opt/vbsf/nginx/certificate/passout" a file that contains a password to decrypt the private key. This file is not required if the private key is not encrypted.

### Installing SSL Certificate on Nginx Server

To replace the default certificate, do the following:

- 1. Log in to the machine where Veeam Backup for Salesforce is installed.
- 2. Upload new SSL certificate files to the /opt/vbsf/nginx/certificate/ folder.
- 3. Set the vbsf user as the owner of the new files and add these files to the vbsf group. To do that, run the command:

sudo chown vbsf:vbsf /opt/vbsf/nginx/certificate/\*

4. Update the configuration parameters in the /etc/nginx/certs configuration file specifying the paths to the new certificate files:

```
ssl_certificate "<path_to_the_new_file>";
ssl_certificate_key "<path_to_the_new_file>";
ssl_password_file "<path_to_the_new_file>";
```

If the private key is not encrypted, remove the password line from the /opt/vbsf/nginx/certificate/passout file.

5. Restart the nginx service. To do that, run the command:

```
sudo systemctl restart nginx
```

To learn how to create and configure your own certificate, see documentation of the relevant SSL providers (for example, Digicert documentation).