Veeam Backup for Salesforce

Version 1.0

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

Welcome to Veeam Backup for Salesforce

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 with near-continuous data protection.
- Restore files, data and metadata in the form of a complete data set including object hierarchies and custom fields.
- Configure granular backup schedules and retention settings at the object level.
- Compare different versions of Salesforce records.
- 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 single sign-on authentication to log in the product Web UI.

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 Architecture Overview.

In This Section

- System Requirements
- Ports
- Required Permissions
- Considerations and Limitations

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	**CPU**: 4 cores (minimum) and additional 1 CPU core for per protected Salesforce organization **Memory**: 6 GB RAM (minimum) and additional 2GB RAM per each protected Salesforce organization **Free space**: 10 GB (minimum), excluding file storage space. For file storage space requirements, see File Storage. **Note**: To improve performance of the management server, it is recommended that you use SSDs for databases and file storage.
OS	• CentOS 7 (centos-release-7-9.2009.1.el7.centos.x86_64 and later) • RedHat Linux 7, 8 • Oracle Linux 7, 8

PostgreSQL Servers

Specification	Requirement
Hardware	**CPU**: 4 cores (minimum) **Memory**: 8 GB RAM (minimum) **Free space**: Use your *Salesforce Data Space* value as a starting point to consider the amount of space required to store the backed-up Salesforce data in a database. The backed-up data will take at least x1.6 more disk space in PostgreSQL. When calculating the required disk space, take into account your desired data set, daily change rate, and the retention policy settings. To learn how to monitor your data storage and used file space in Salesforce, see Salesforce Documentation. **Note**: To improve performance of PostgreSQL servers, it is recommended that you use SSDs on the machines running the servers.
PostgreSQL	Versions 12-14

File Storage

Specification	Requirement
Hardware	Veeam Backup for Salesforce stores file data and metadata in the */opt/vbsf/vbsf-backup/data* folder on the management server. Make sure you have enough space to store this data. Available disk space must take into account the total volume of your used file space in Salesforce and your daily change rate. It is recommended to have +25% of the free space on your file storage over the used file space amount. You can see the volume of your data storage and file used space in Salesforce. To do that, open the Salesforce UI and navigate to **Setup** > **Company** information. Network file shares are not supported. **Note**: To improve performance of the management server, it is recommended that you use SSDs for the file storage.

Salesforce

Specification	Requirement
Salesforce API	Salesforce objects available in API version 55 and earlier are supported. Newly released objects available in API version 56 and later are not supported, for example the *PendingOrderSummary* object.

Ports

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

From	To	Protocol	Port	Notes
Web browser (local machine)	Management server	TCP	443	Required to access the Web UI component from a user workstation.
		SSH	22	Required to communicate with the backup service running on the management server.
Management server	PostgreSQL servers	TCP	5432	Required to communicate with servers hosting databases used to store backed-up data.
	Salesforce	TCP	443	Required to communicate with Salesforce entities.
	SMTP server	TCP	25	Default port used for sending email notifications.
	Veeam License Server (vbsf.butler.veeam.com)	TCP	443	Required to activate licenses, to verify license updates and metering.
	Veeam Update Notification Server (repository.veeam.com)	TCP	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 to connect to Salesforce organization to perform backup and restore operations for Salesforce resources. 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).
	• Permission set that has the following permissions enabled:
	  ○ Query All Files permission
	  ○ View and Edit Converted Leads permission
	  ○ Permissions for all record types of objects
	• 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, **High Velocity Sales** requires application activation.

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: • **Full access** (full). • **Perform requests at any time** (refresh_token, offline_access). 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. **Note**: 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 to deploy and configure 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 v1 supports backup of all data and objects available on the Salesforce Platform if these resources can be retrieved using the Salesforce API version 55 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 leveraging another platform and is not protected by the product.

- Both Salesforce Classic and Lightning Experience 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, Unlimited.

Backup and Restore

- Backup of personal reports and dashboards is not supported due to Salesforce limitations.
- Backup of Salesforce Geolocation and Location fields, and Salesforce Field Service objects is not supported in Veeam Backup for Salesforce v1.
- Backup of encrypted fields is not supported.
- Backup of big 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 EmailCapture, MobileApplicationDetail, MailmergeTemplate, QuoteDocument and ContentNote types of content is not supported in Veeam Backup for Salesforce v1.
- Restore of images in a rich-text format field is not supported in Veeam Backup for Salesforce v1.

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. This means that, if you are located in the UTC+2 time zone and you schedule a backup policy to run at 10:00 AM, the policy will run at 8:00 AM UTC.

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 you have assigned the user all the required permissions.

Licensing

A product license is required for the 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 Salesforce user license 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 terminate 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 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

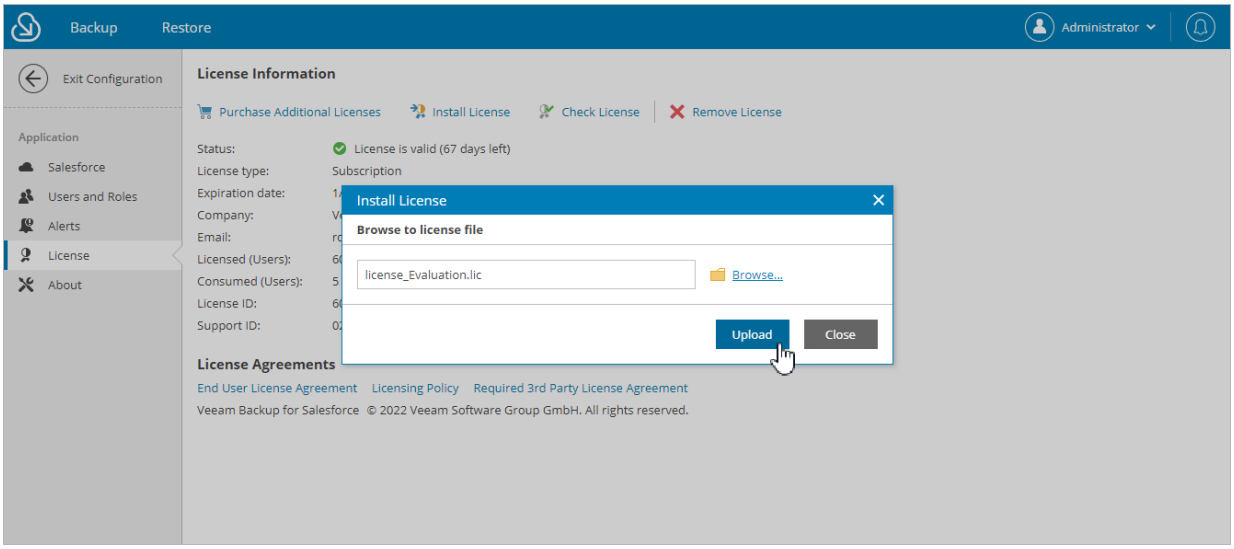
On the **License** tab, you can see the current license details, install a new license or remove the currently used license.

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**.

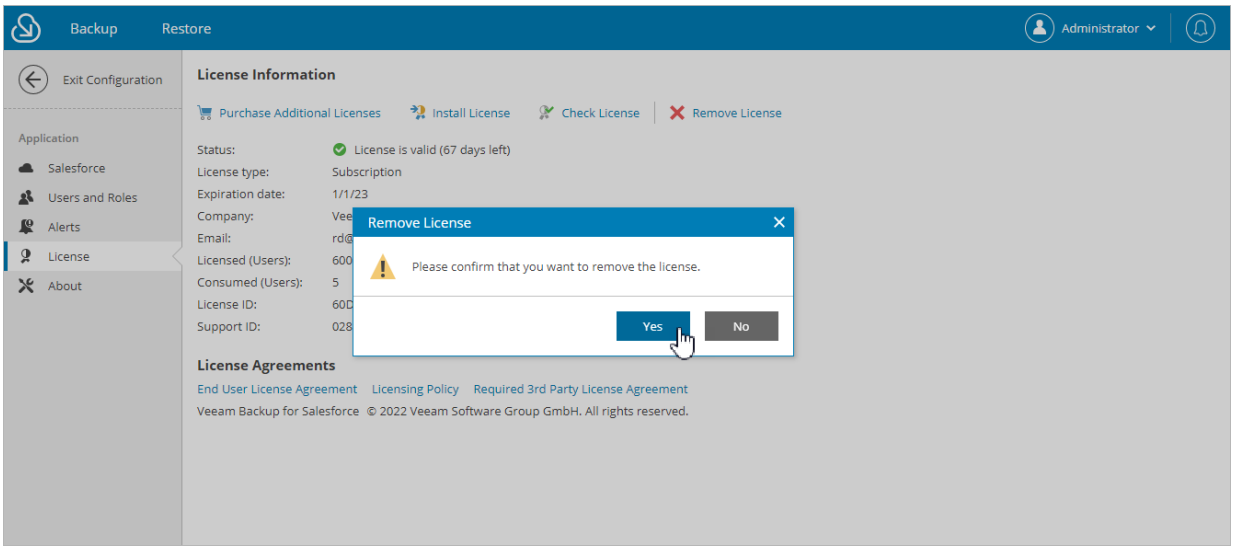


Removing License

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

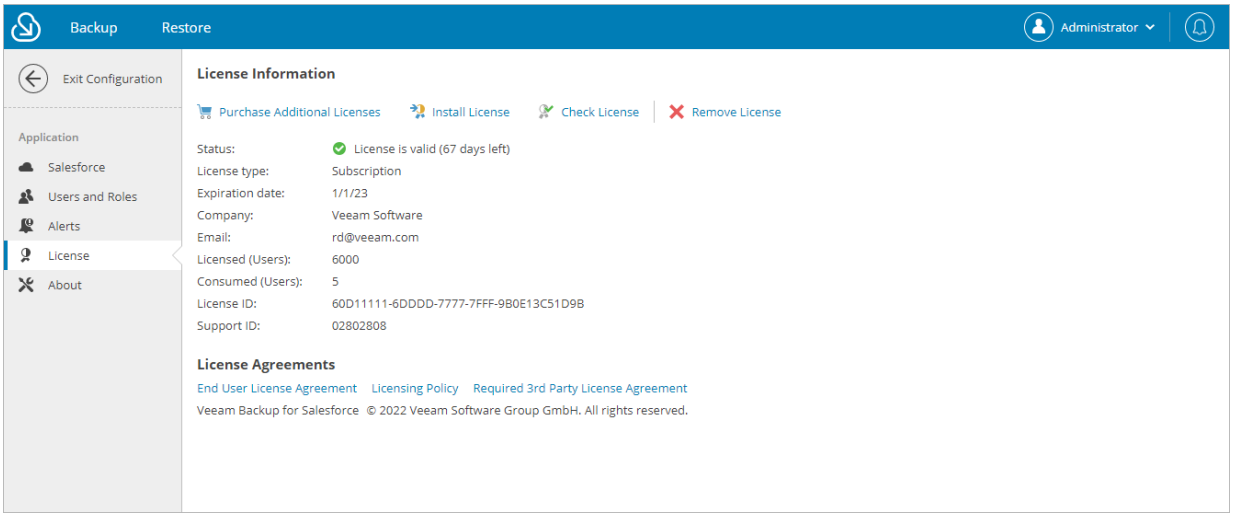
The license validity is verified by the Veeam License Server right after the installation and, then, periodically once a week. You can also verify the license manually, to do that:

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.



Architecture Overview

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 recovery tasks.
- Controls backup policy scheduling.
- Generates daily reports and email notifications.

Management Server Components

The management server uses the following components:

- **Backup service** (`vbsf-backup service`) — performs data retrieval from Salesforce.
- **Restore service** (`vbsf-restore service`) — performs data upload to Salesforce.
- **Configuration database** — stores application configuration, connection details to Salesforce organizations, backup policies, restore jobs, sessions and so on. Note that this database is created during initial configuration of Veeam Backup for Salesforce. Depending on your choice, the configuration database can reside on the management server or remote PostgreSQL server.
- **Management server and Web UI** (`vbsf-backend service`) — orchestrates operations performed by other services and provides a web interface that allows user to access to the Veeam Backup for Salesforce functionality.
- **Veeam Updater** (`veeam-updater service`) — allows Veeam Backup for Salesforce to check, view and install product and package updates.

PostgreSQL Server

To store data and metadata of protected Salesforce organizations, Veeam Backup for Salesforce uses PostgreSQL databases. Each protected organization must have a dedicated database. During backup, Veeam Backup for Salesforce creates standard 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.

Consider the following:

- PostgreSQL server must be installed and configured separately. It is not a part of the Veeam installation package.
- Veeam Backup for Salesforce consumes around 50 connections to PostgreSQL database per one backup policy. To avoid possible errors, adjust the maximum allowed number of connections to meet the needs of all backup policies.

File Repositories

To store backups of Salesforce binary objects 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/vbsf-backup/data*. The name of each file repository is static and contains the path to the folder and organization ID. It is recommended to mount additional storage — an array of disks — to the specified directory to prevent any disk capacity issues on the management server. For more information on required disk capacity, see System Requirements.

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 the machine where you plan to install Veeam Backup for Salesforce meets the minimal system requirements.

   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 metadata and file storage in the following location `/opt/vbsf/vbsf-backup/data`. If you plan to deploy PostgreSQL server locally on the management server, make sure you have enough space for databases. The default database location is `/var/lib/pgsql/`.

> **IMPORTANT**
>
> You cannot update Veeam Backup for Salesforce Beta version. You must perform a new installation of the product on a machine with a new or empty database and folders that do not contain any backups.

2. Make sure the Linux system locale is set to UTF-8 on the machine where you plan to install Veeam Backup for Salesforce.
3. To install Veeam Backup for Salesforce software packages, you must use the root or super user account to install the system components and services.
4. If you have SELinux installed, you must allow `httpd` to connect to the network. To do that, send the following command:

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

4. An EPEL repository must be added to allow Nginx installations. To add the repository, send the following command:

   ```
   sudo yum install epel-release
   ```

   For more information on EPEL, see EPEL Documentation.

Installing Veeam Backup for Salesforce

You can install Veeam Backup for Salesforce 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. To do that, run the following command:

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

2. Reboot the system to apply the new locale settings.
3. Download the installation script to the machine where you want to deploy Veeam Backup for Salesforce. To do that, run 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
   ```

   Veeam Backup for Salesforce will start installation of packages and dependencies, configure all settings, and then run configuration checks.

5. Copy to 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 Product Manually

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

1. Set the Linux system locale to UTF-8. To do that, run the following command:

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

2. Reboot the system to apply the new locale settings.

3. Download the Veeam software repository installation package (veeam-release) from the Veeam Download page to the machine where you want to deploy Veeam Backup for Salesforce:

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

4. Install repository and a package manager. To do that, run the following command:

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

5. Install the product using the package manager from the repository. To do that, run the following command:

```
sudo yum install vbsf
```

Veeam Backup for Salesforce will start installation of packages and dependencies, and then run configuration checks.

6. After all configuration checks complete successfully, you will be prompted to run the server configuration script. To do that, run the following command:

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

To complete server configuration, do the following:

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

NOTE

To store backups of Salesforce binary objects 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/vbsf-backup/data*.

b. Configure log rotation settings.

At this step the log rotation policy must be configured. This policy defines a time period during which the logs will be kept. It allows you to consume less storage space by deleting product logs that are no longer needed.

The time period is specified in days. If you specify *0*, product logs will not be deleted. Consider that if the management server runs out of space, Veeam Backup for Salesforce will fail to run.

c. Choose whether you want to install a PostgreSQL instance 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/vbsf-backend/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 to 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.

d. Choose whether you want to automatically configure Nginx settings required for the management server to work properly.

   It is recommended to 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 to 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.

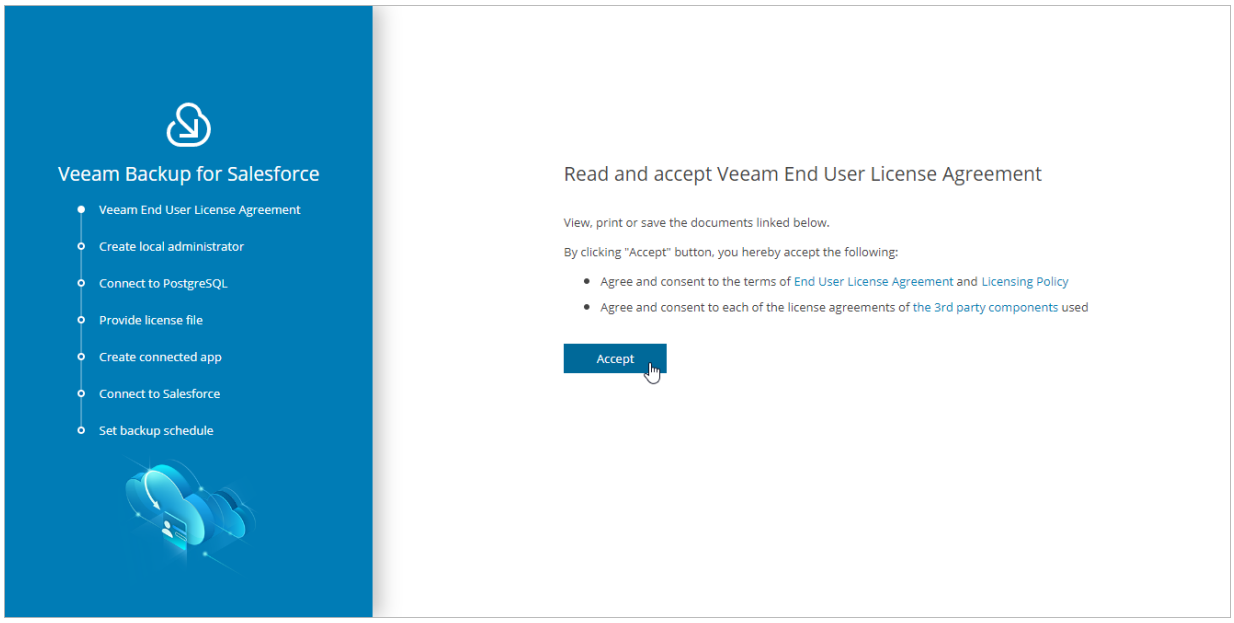
> **IMPORTANT**
>
> Consider the following:
>
> - Internet Explorer is not supported. To access Veeam Backup for Salesforce, use the latest versions of Microsoft Edge, Mozilla Firefox (except Mozilla Firefox for Linux), Safari and Google Chrome.
> - The backup server is using a unique self-signed SSL certificate, 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.

To configure 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.

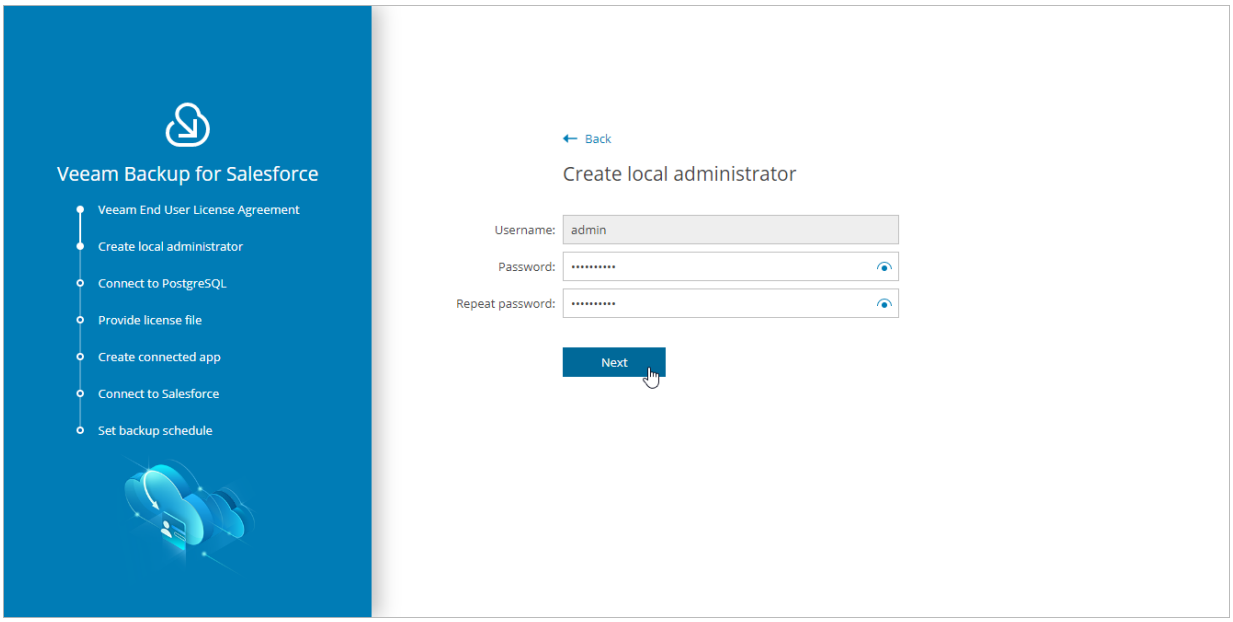


Step 2. Create Local Administrator

At the **Create local administrator** step of the wizard, specify a password for the default administrator account. The password must contain uppercase and lowercase Latin letters and special characters (!@#$%^&). The minimum length of the password is 8 characters.

This administrator will be able to perform all operations in Veeam Backup for Salesforce. Consider that you will not be able to remove or change this account using the Web UI. To learn how to change the password of the default administrator, see Editing Users.

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.



Step 3. Connect to Database

At the **Connect to PostgreSQL** step of the wizard, if you perform the initial configuration of the new instance of Veeam Backup for Salesforce, 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.

To configure connection settings, do the following:

1. In the **Server 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 **Server 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.

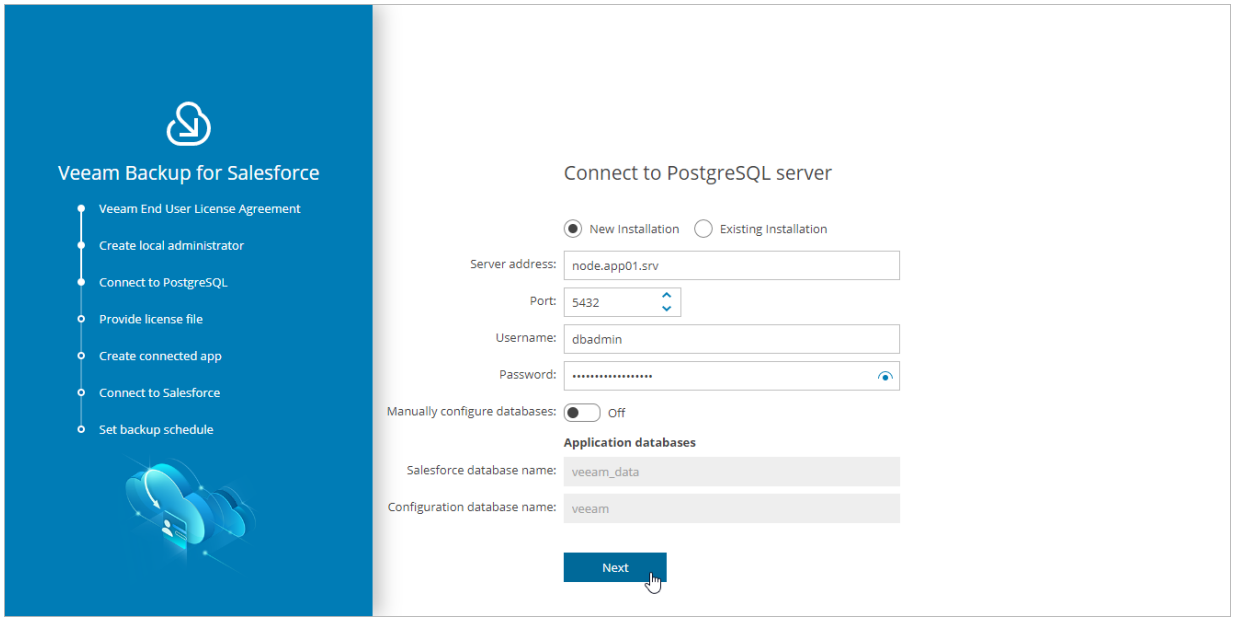
By default, Veeam Backup for Salesforce creates new databases with the following names:

- **veeam_data** – the name used for the database that will store the backed-up data.
- **veeam** – the name used for the configuration database.

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

NOTE

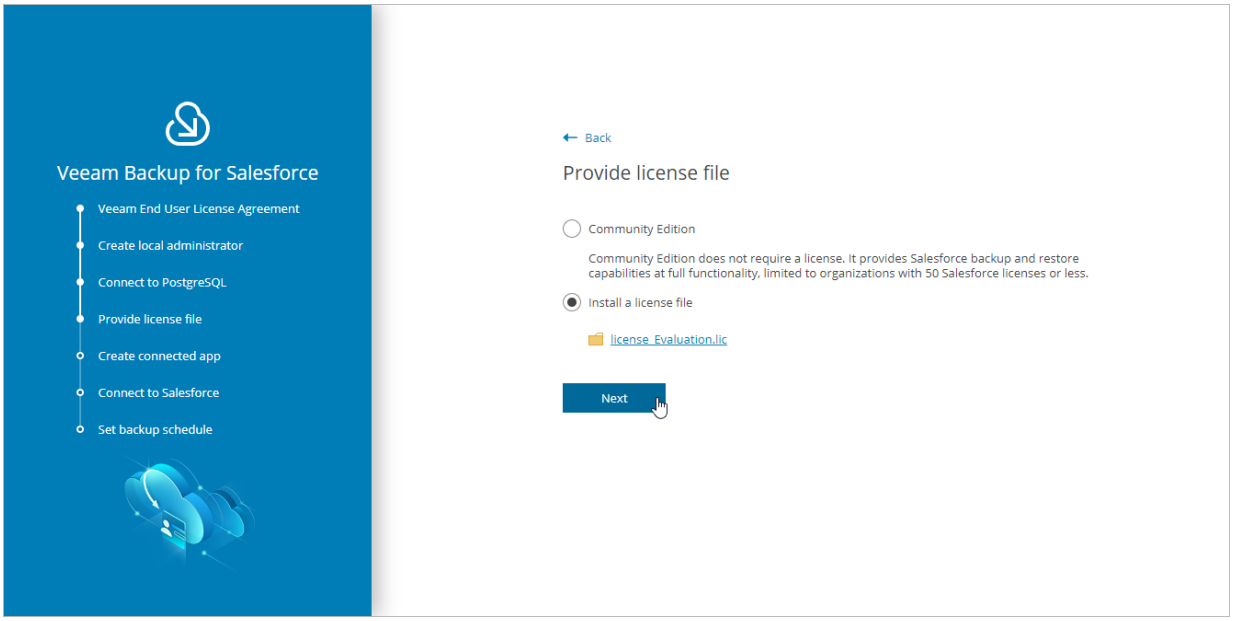
If you perform configuration of the existing instance of Veeam Backup for Salesforce, at the **Connect to a PostgreSQL** step of the wizard, specify connection settings that will be used to access the existing configuration database.



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 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) and **Perform requests at any time** (refresh_token, offline_access) 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 exactly match the management server FDQN 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*.

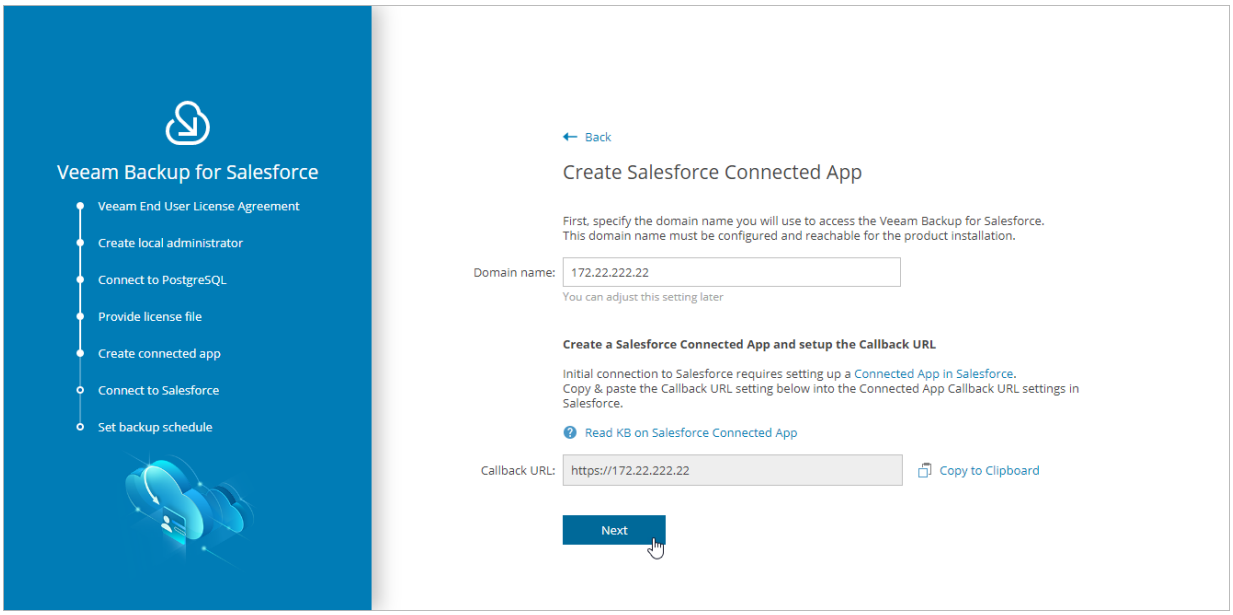
  After that, your *Callback URLs* list will contain the following URLs:

  - 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 to create a dedicated Connected App for each product deployment.

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



Step 6. Connect to Salesforce

At the **Connect to Salesforce** step of the wizard, connect to a Salesforce organization that will be protected by the default backup policy, which is automatically created by Veeam Backup for Salesforce during the initial configuration. For more information on backup policies, see Performing Backup.

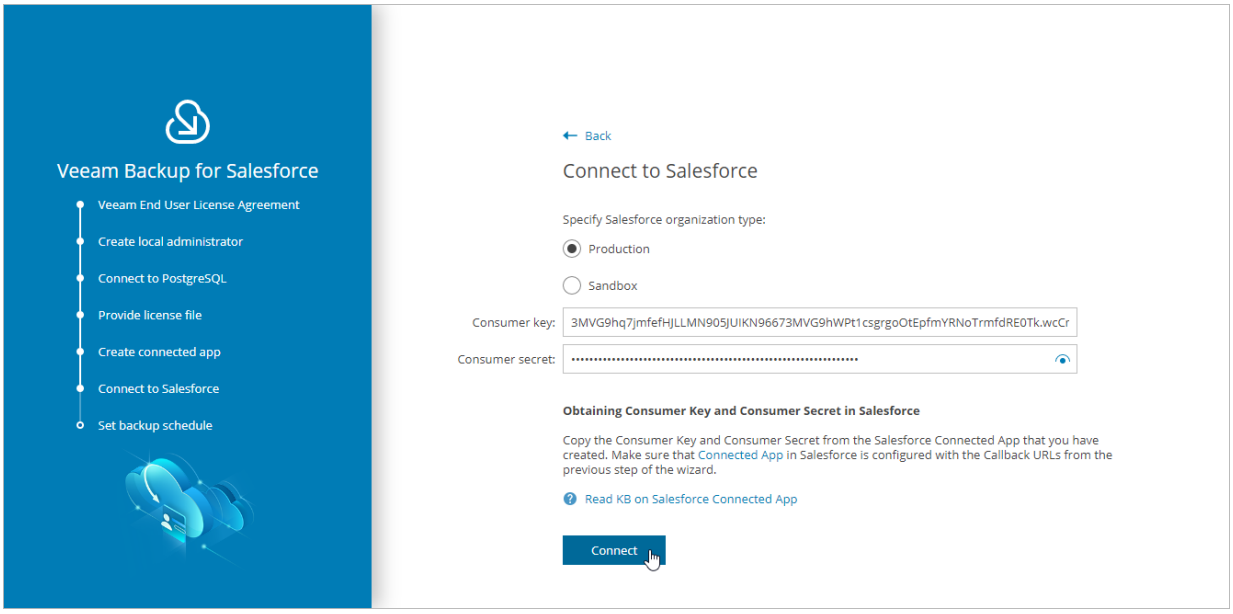
To connect to the organization, do the following:

1. Choose whether you will protect a production or sandbox Salesforce organization.
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.



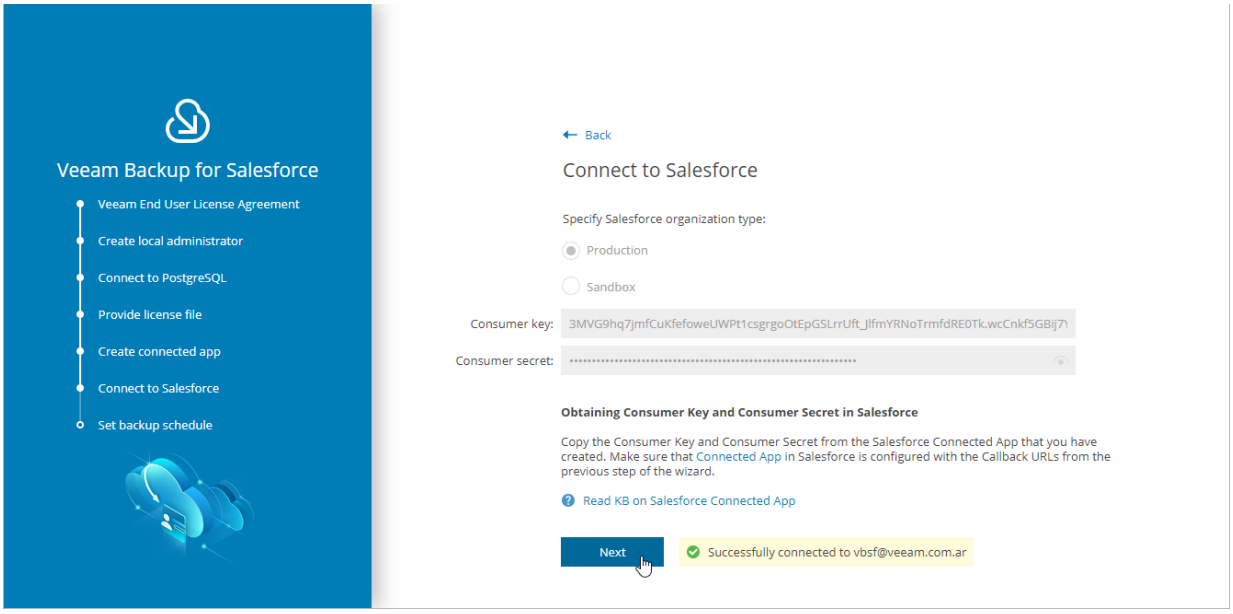
3. On the Salesforce authentication webpage, enter credentials of an account created in the Salesforce organization that you want to protect, and click **Log in**.

   The specified account must be assigned permissions required for Veeam Backup for Salesforce to be able to perform backup and restore operations. For 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 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.



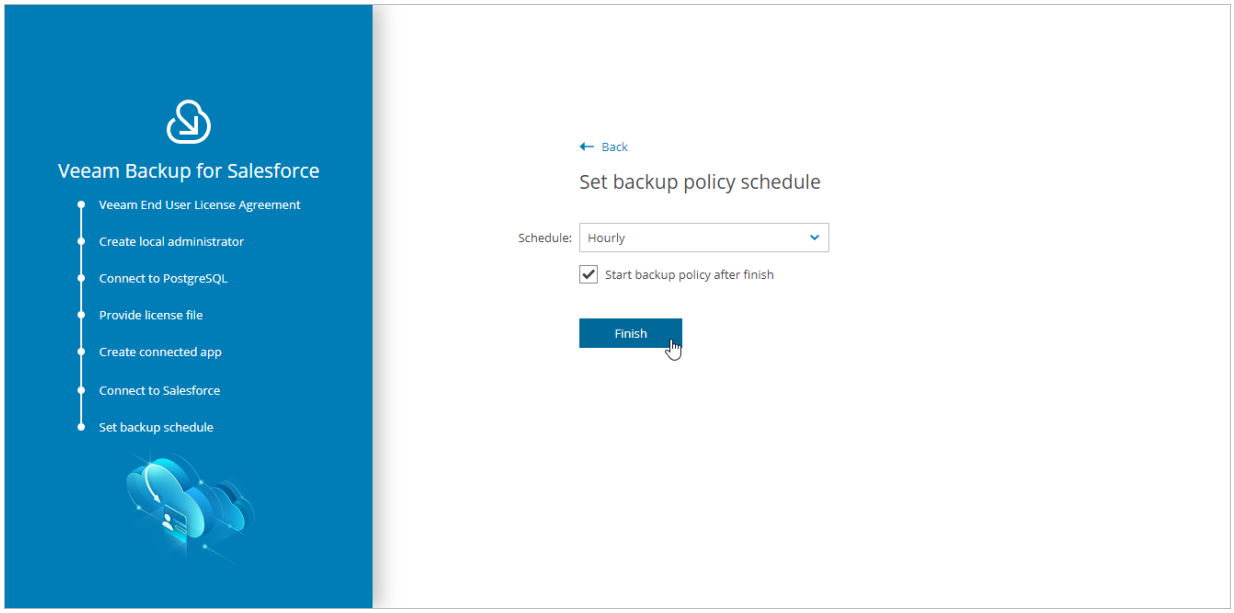
Step 7. Set Backup Policy Schedule

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.

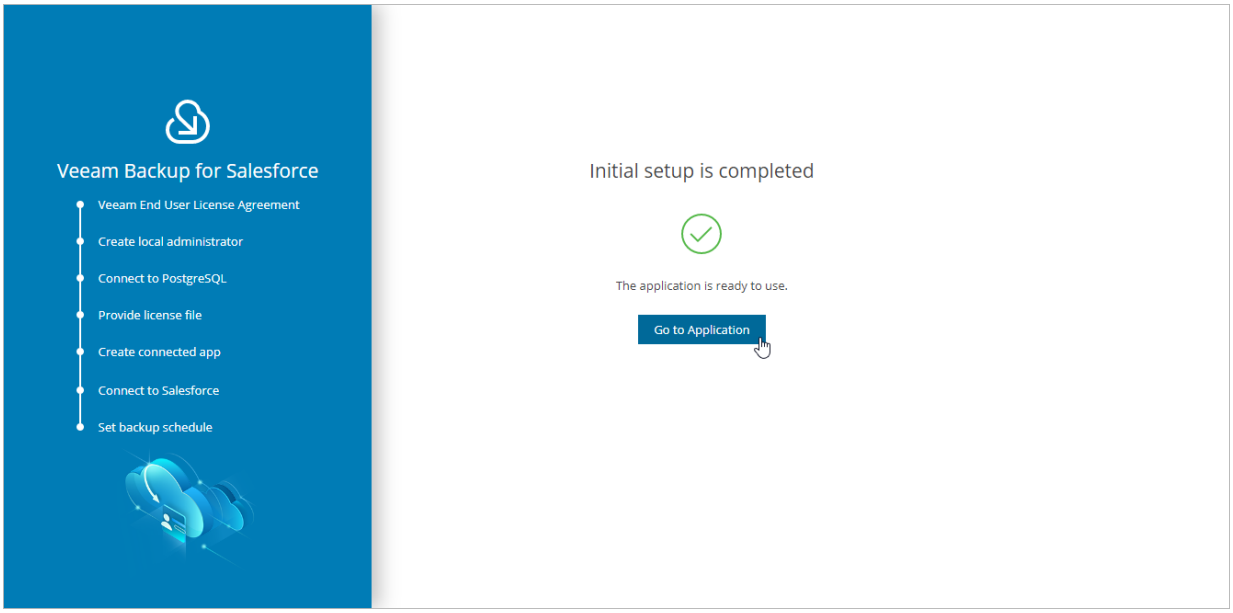
You can change these settings later as described in section Editing Backup Policies.

> **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.



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.



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

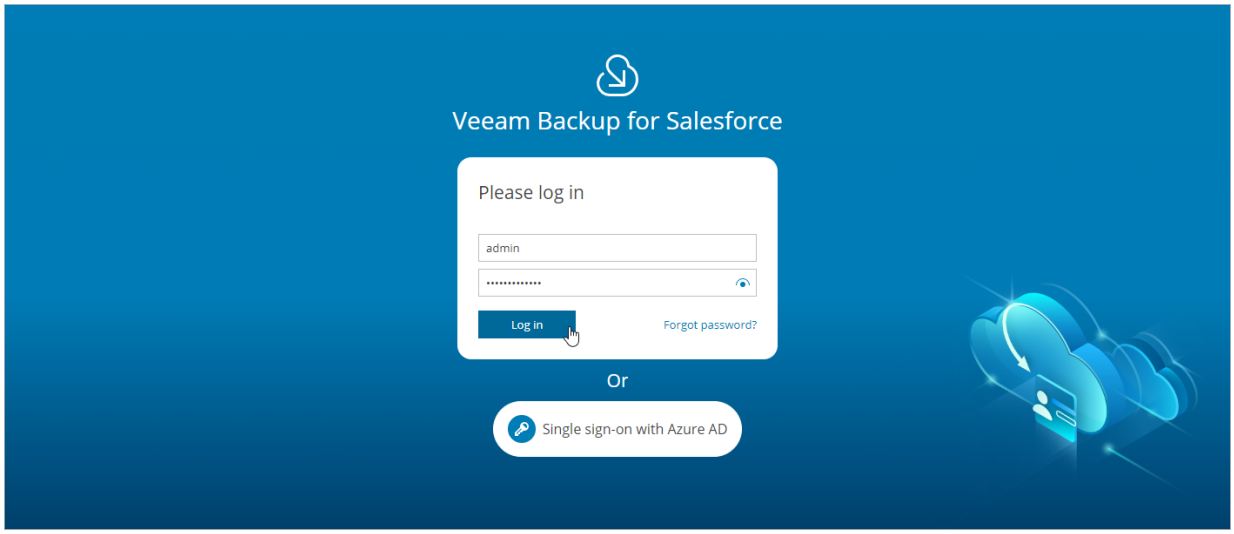
To log in to Veeam Backup for Salesforce, do the following:

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 as an identity provider in Veeam Backup for Salesforce, you can click **Single sign-on with Azure AD**. You will be redirected to the Microsoft 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.



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 are added to Veeam Backup for Salesforce automatically when you create backup policies. 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 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

- Editing Organizations
- Removing Organizations

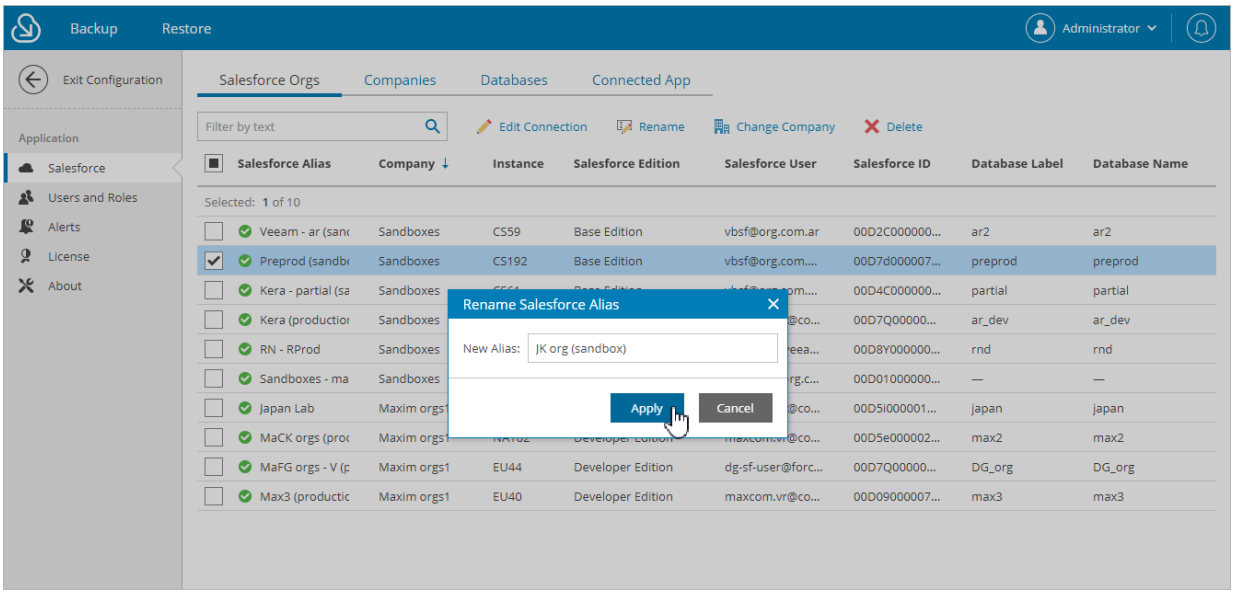
Editing Organizations

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**.



Changing Company

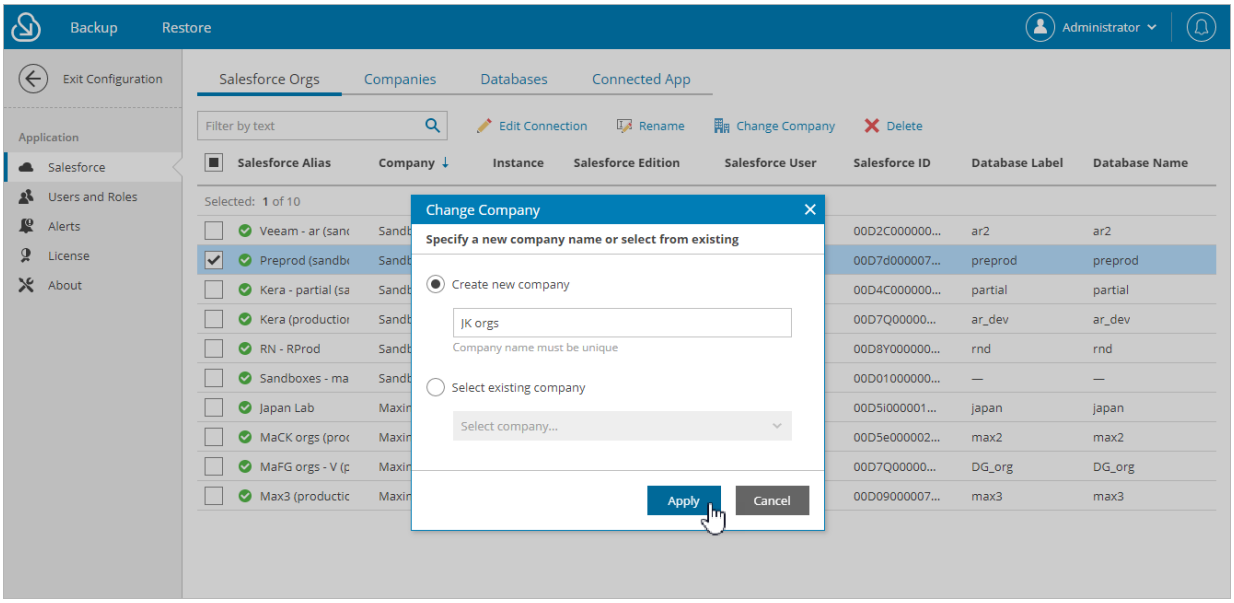
To assign organizations to another company, do the following:

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 Adding Companies.

b. Click **Apply**.



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:

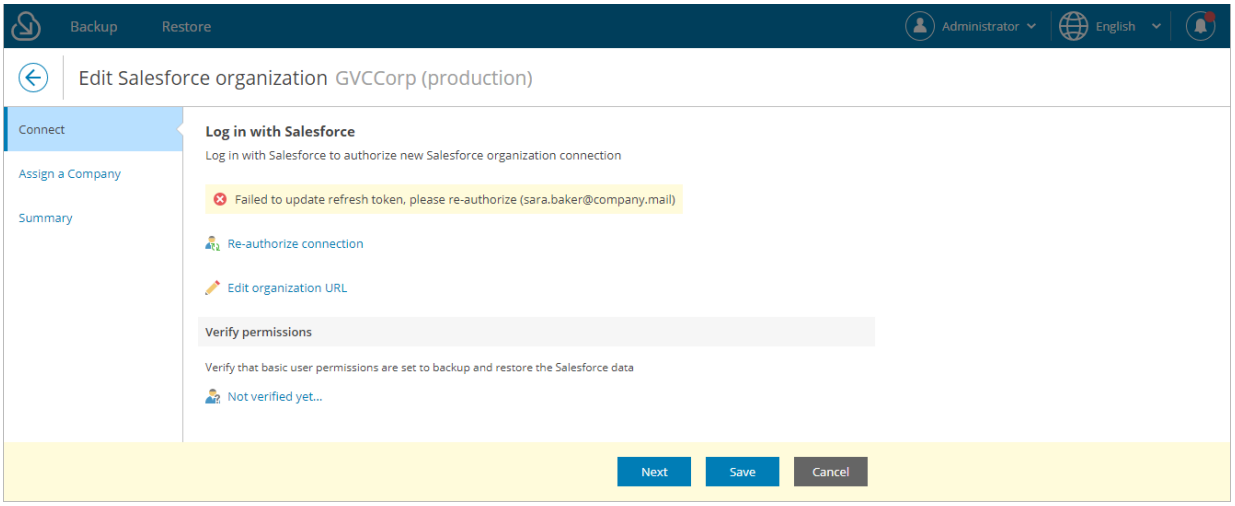
   a. To re-authorize connection to the organization, click **Re-authorize connection**. You will be redirected to the Salesforce authentication webpage.

      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.



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 Adding Companies.

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

Removing Organizations

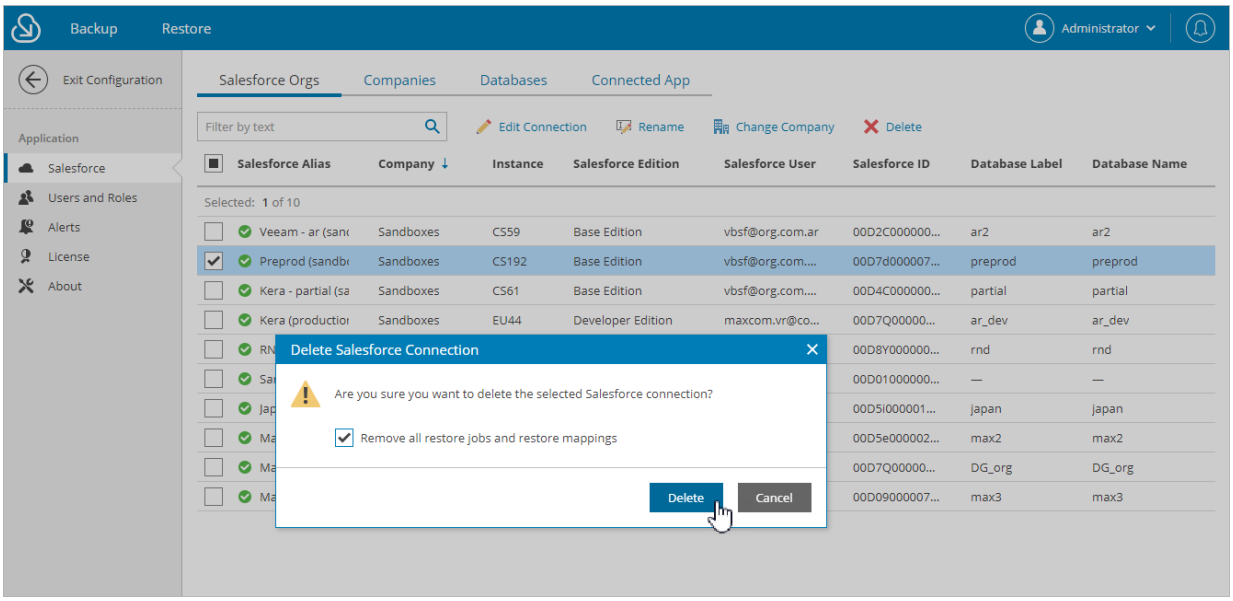
You can remove Salesforce organizations from the configuration database.

> **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 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.

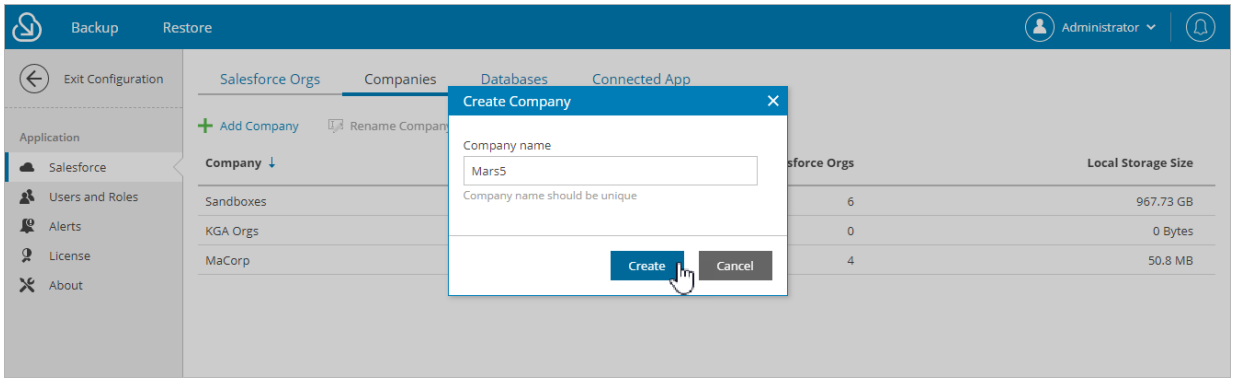
A company is created automatically when you connect to a Salesforce organization. You can also add companies manually, edit created companies, re-assign company organizations and remove companies.

> **TIP**
>
> You can track the disk space usage of the management server by protected Salesforce organizations in the **Local Storage Consumption** column on the **Companies** tab.

Adding Companies

To add a new company, do the following:

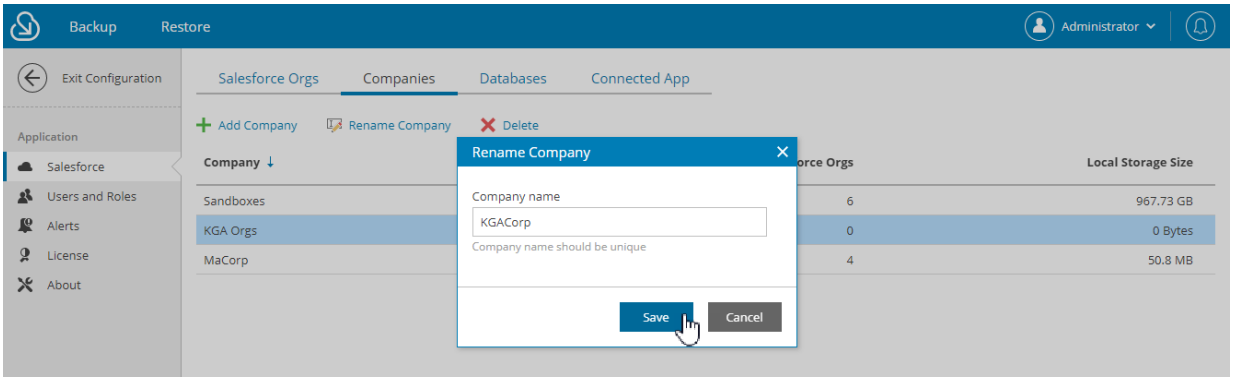
1. Switch to the **Configuration** page.
2. Navigate to **Salesforce** > **Companies**.
3. Click **Add Company**.
4. In the **Create Company** window, specify a name of a new company and click **Create**.



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**.



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.

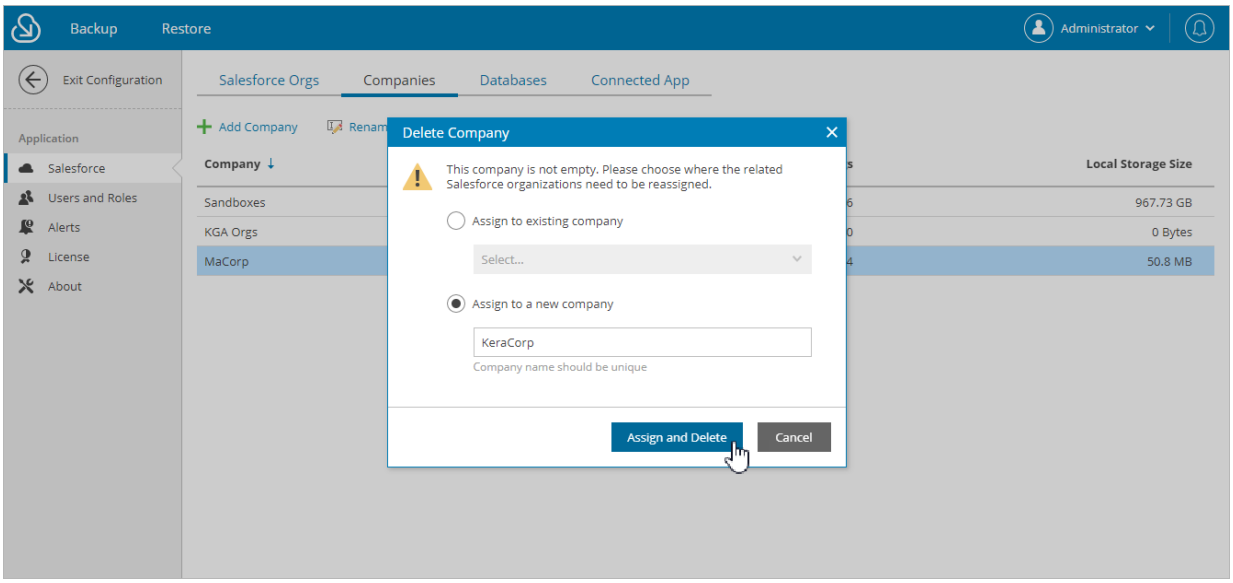
> **IMPORTANT**
>
> When you remove a company and re-assign organizations to another company:
>
> - Users that have company-wide permissions to the new company will automatically get permissions to access data of all re-assigned Salesforce organizations.
> - Users that have permissions to access the 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 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**.



Managing Databases

To store the 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 the Veeam Backup for Salesforce configuration database before or during creation of backup policies. To add databases beforehand and to manage the existing databases, use the **Database** tab.

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 databases.

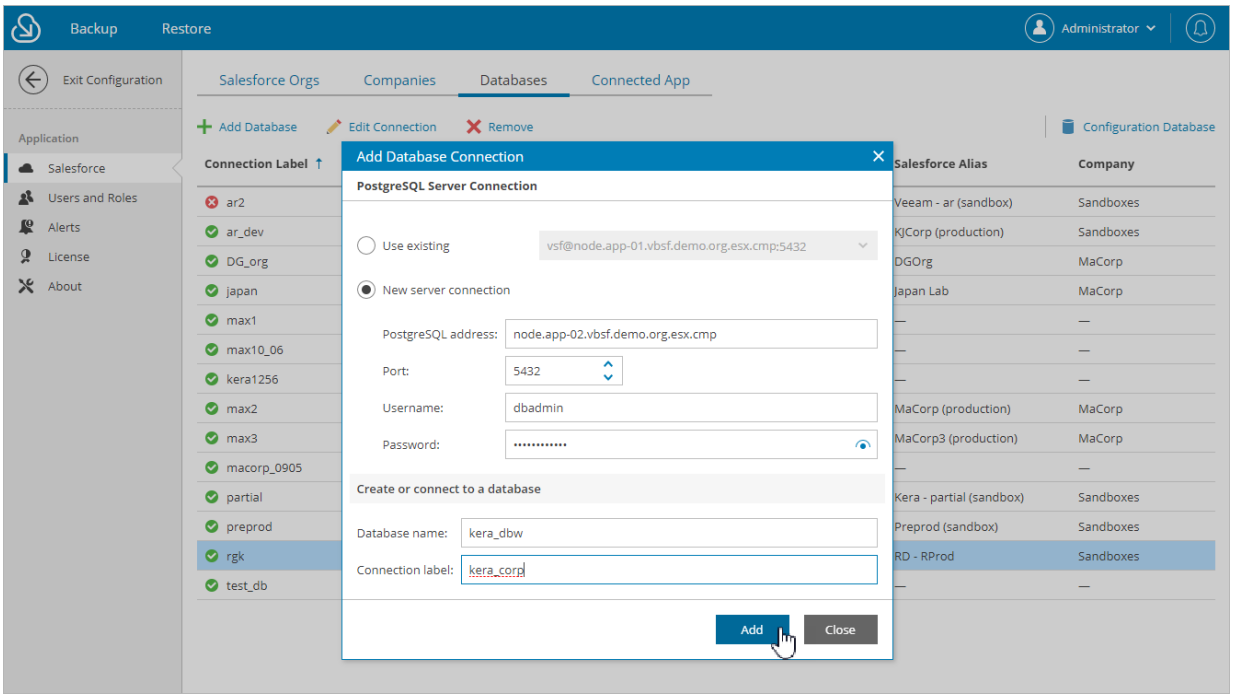
   b. In the **Port** field, choose a network port that will be used by Veeam Backup for Salesforce to connect to the PostgreSQL server. The default port number is 5432.

   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 the 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**
>
> Only empty databases can be used to store backed-up data of Salesforce organizations.

6. Click **Add**.

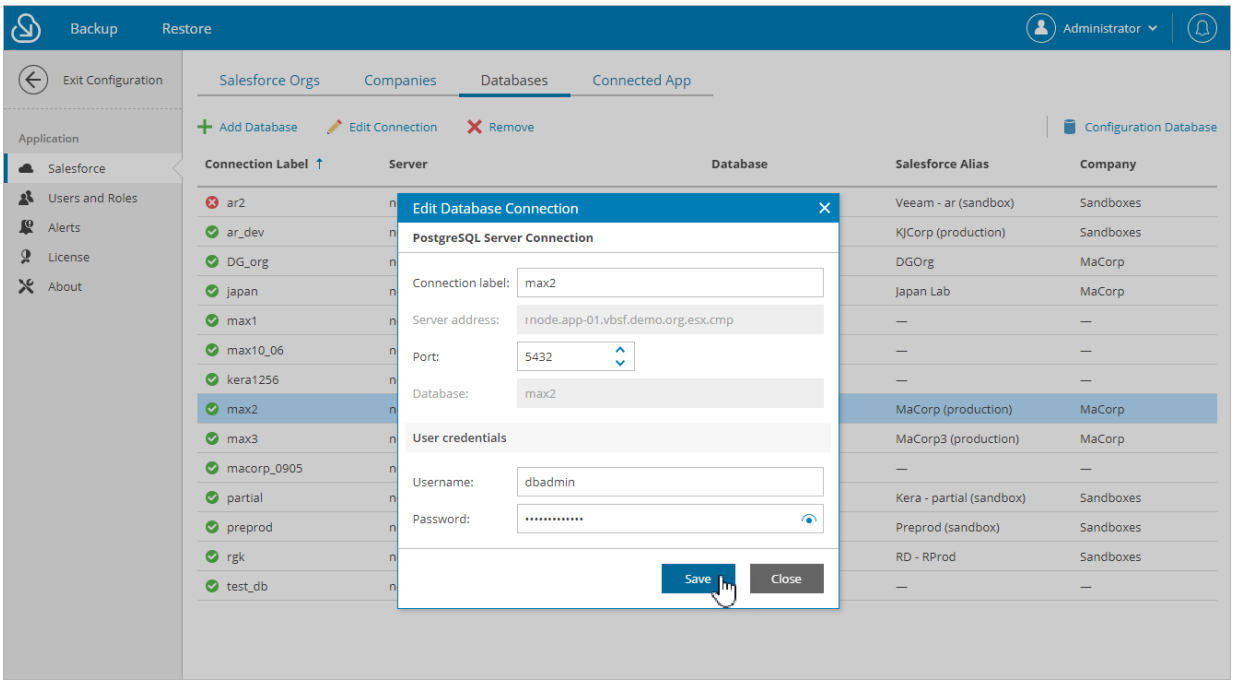

Backup
Restore
Administrator
Exit Configuration
Application
Salesforce
Users and Roles
Alerts
License
About
Salesforce Orgs
Companies
Databases
Connected App
Add Database
Edit Connection
Remove
Configuration Database
Connection Label
Salesforce Alias
Company
ar2
ar_dev
DG_org
japan
max1
max10_06
kera1256
max2
max3
macorp_0905
partial
preprod
rgk
test_db
Veeam - ar (sandbox)
KJCorp (production)
DGOrg
Japan Lab
MaCorp (production)
MaCorp3 (production)
Kera - partial (sandbox)
Preprod (sandbox)
RD - RProd
Sandboxes
MaCorp
Add Database Connection
PostgreSQL Server Connection
Use existing
vsf@node.app-01.vbsf.demo.org.esx.cmp:5432
New server connection
PostgreSQL address:
node.app-02.vbsf.demo.org.esx.cmp
Port:
5432
Username:
dbadmin
Password:
Create or connect to a database
Database name:
kera_dbw
Connection label:
kera_corp
Add
Close

Editing Databases

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 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.



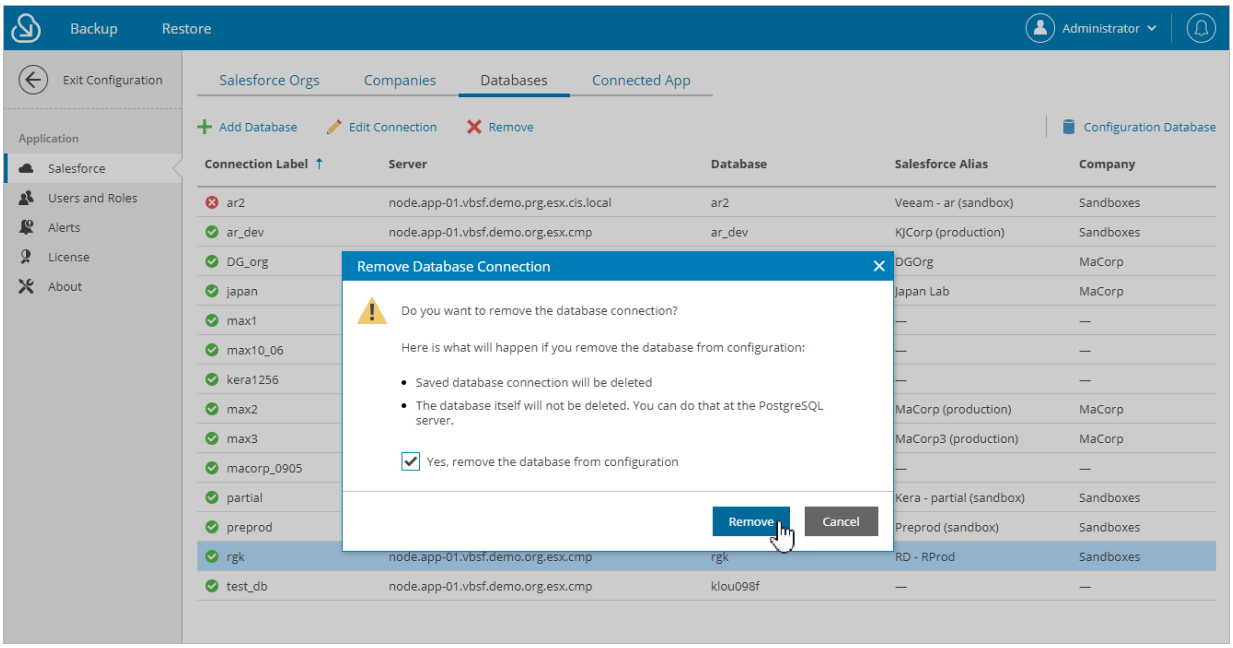
Removing Databases

You can remove databases from the configuration database. Note that Veeam Backup for Salesforce will not automatically delete the database from the host server. You can further reconnect the removed database to the same or to another Veeam Backup for Salesforce server and use it to protect the same organization. If you do not need the data stored in the database anymore, you can manually delete the database after removing it from Veeam Backup for Salesforce.

> **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).

> **NOTE**
>
> Only Azure Active Directory oAuth 2.0 IdP is supported in Veeam Backup for Salesforce v1.

In This Section

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

Configuring IdP and SSO Settings

Veeam Backup for Salesforce supports single sign-on (SSO) authentication based on the SAML 2.0 protocol. SSO authentication scheme allows a user to log in to different software systems with the same credentials using an identity provider (IdP).

> **NOTE**
>
> Only Azure Active Directory oAuth 2.0 IdP is supported in Veeam Backup for Salesforce v1.

Configuring IdP Settings on Microsoft Azure Side

To configure the IdP settings on the Microsoft Azure side, you must create a new 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:

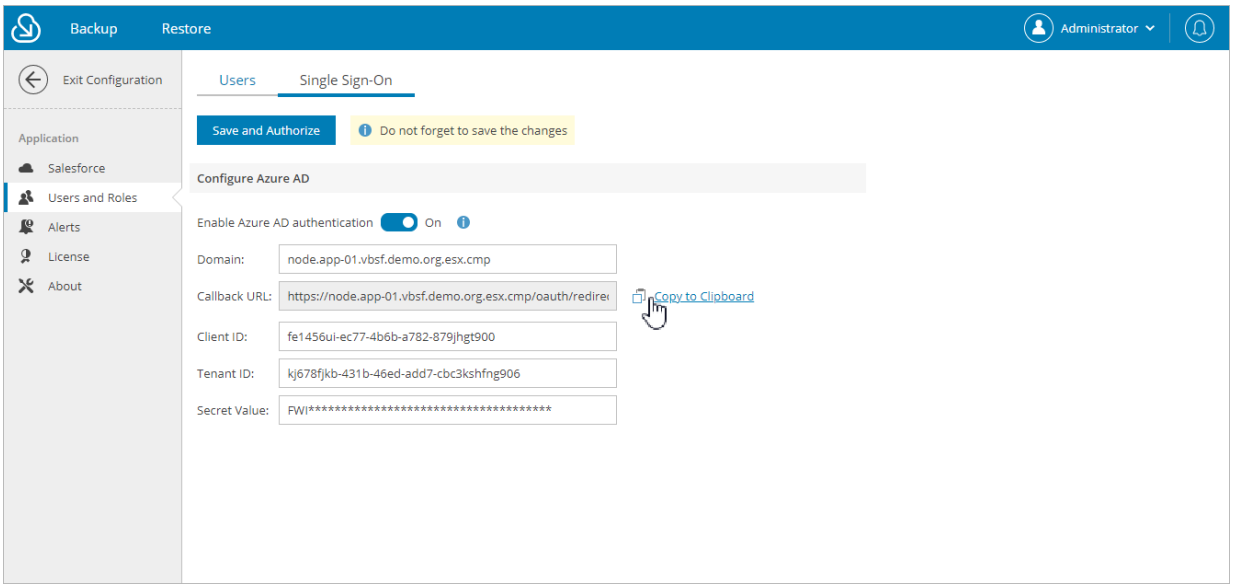
- The following API permissions must be granted to the application:
  - *GroupMember.Read.All*
  - *User.Read*
  - *User.Read.All*
- The redirect URI added to the application must match the management server FDQN that you use to access the Veeam Backup for Salesforce Web UI. To make sure that you are adding the correct URI, switch to the **Configuration** page and navigate to **Users and Roles** > **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 **Users and Roles** > **Single Sign-On**.
3. Set the **Enable Azure AD authentication** toggle to *On*.
4. In the **Client 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.
5. In the **Tenant 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.
6. In the **Secret Value** field, enter the value of a client secret created in the specified Azure AD application. To learn how to create client secrets, see Microsoft Docs.
7. Click **Save and Authorize**. 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.

As soon as the IdP settings are successfully configured, the SSO session is started. You can start adding users to Veeam Backup for Salesforce. Consider that the SSO session time out is 30 minutes. If the SSO 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 30 minutes.



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 and backup and restore operations. This role gives a user access to all companies and all Salesforce organizations added to Veeam Backup for Salesforce.
- **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	Full	Full
Restore	Managing restore jobs, performing restore	Full	Full	Full	Viewing restore jobs and sessions
	Downloading restore session logs	Full	Full	Full	Full
Configuration					
Salesforce	Managing companies	Full	-	-	-
	Managing Salesforce organizations	Full	Adding and viewing Salesforce organizations	Viewing Salesforce organizations	Viewing Salesforce organizations

Tab	Functionality	Administrator	Backup Operator	Restore Operator	Viewer
	Managing databases	Full	Full	Viewing databases	Viewing databases
	Managing Connected App	Full	-	-	-
Users and Roles	Managing users	Full	-	-	-
Alerts	Managing notifications	Full	Alerts on backup policy execution, restore operations, connection status and license	Alerts on restore operations	-
License	Managing license	Full	Viewing license information	Viewing license information	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**.
4. In the **Add User to a Role** 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 **Apply**.
   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.

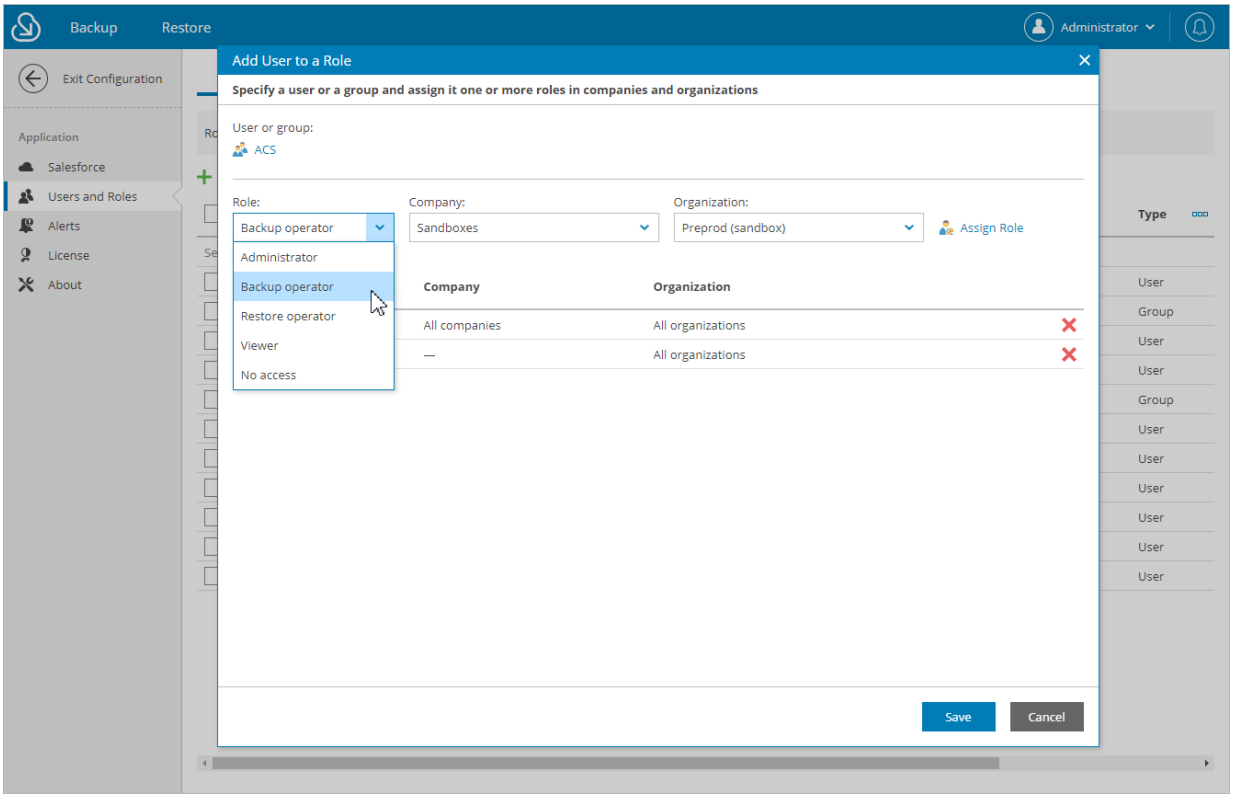
> **NOTE**
>
> You cannot limit the scope of resources for the *Administrator* role. By default, this role provides access to all companies and Salesforce organizations added to Veeam Backup for Salesforce.

   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**.


Backup
Restore
Administrator
Exit Configuration
Application
Salesforce
Users and Roles
Alerts
License
About
Add User to a Role
Specify a user or a group and assign it one or more roles in companies and organizations
User or group:
ACS
Role:
Backup operator
Company:
Sandboxes
Organization:
Preprod (sandbox)
Assign Role
Administrator
Backup operator
Restore operator
Viewer
No access
Company
Organization
All companies
All organizations
—
All organizations
Type
User
Group
User
User
Group
User
User
User
User
User
Save
Cancel

Editing Users

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

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.

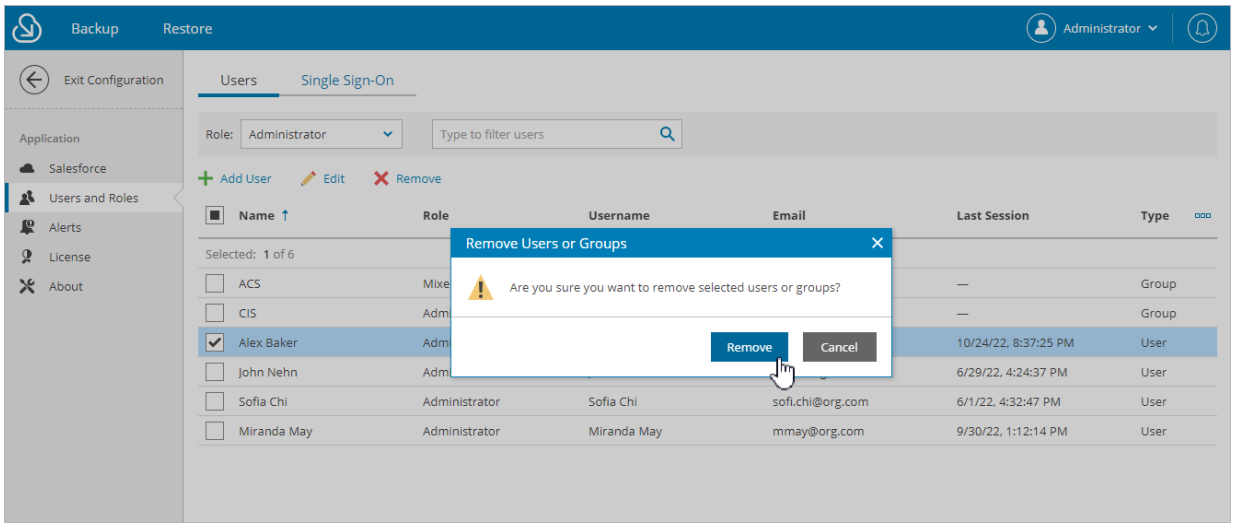
> **NOTE**
>
> If you rename a group of users in Azure Active Directory, Veeam Backup for Salesforce does not automatically update the record in the configuration database. To update the group name in the product Web UI, select the group, click **Edit** and re-save the record.

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 **Remove**.
4. In the **Remove Users or Groups** 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.



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, users assigned the *Backup operator* or *Restore operator* roles can manage alerts only for companies and Salesforce organizations within their specified scope of permissions.

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 alerts by email or in Slack, you must configure notification settings.

Configuring Email Notifications

To receive notifications by email, connect to SMTP server and specify notification frequency:

1. Switch to the **Configuration** page.
2. Navigate to **Alerts** > **Connection Settings**.
3. Set the **Email alerts** toggle to *On*.
4. 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.
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.

   In the **Port** field, you can change a communication port for SMTP traffic. The default SMTP port is 25.
6. In the **Timeout** field, specify a timeout for the connection attempt to the SMTP server.
7. For an SMTP server with SSL/TLS support, select the **Connect using SSL** check box to enable SSL data encryption.
8. If your SMTP server requires authentication, select the **Require authentication** check box and specify user credentials in the **Username** and **Password** fields.
9. 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.

Configure Slack Notifications

To receive alert notifications to a specific Slack channel or chat, 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 the chat.

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.

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 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**.

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 to 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 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**
>
> After 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 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.

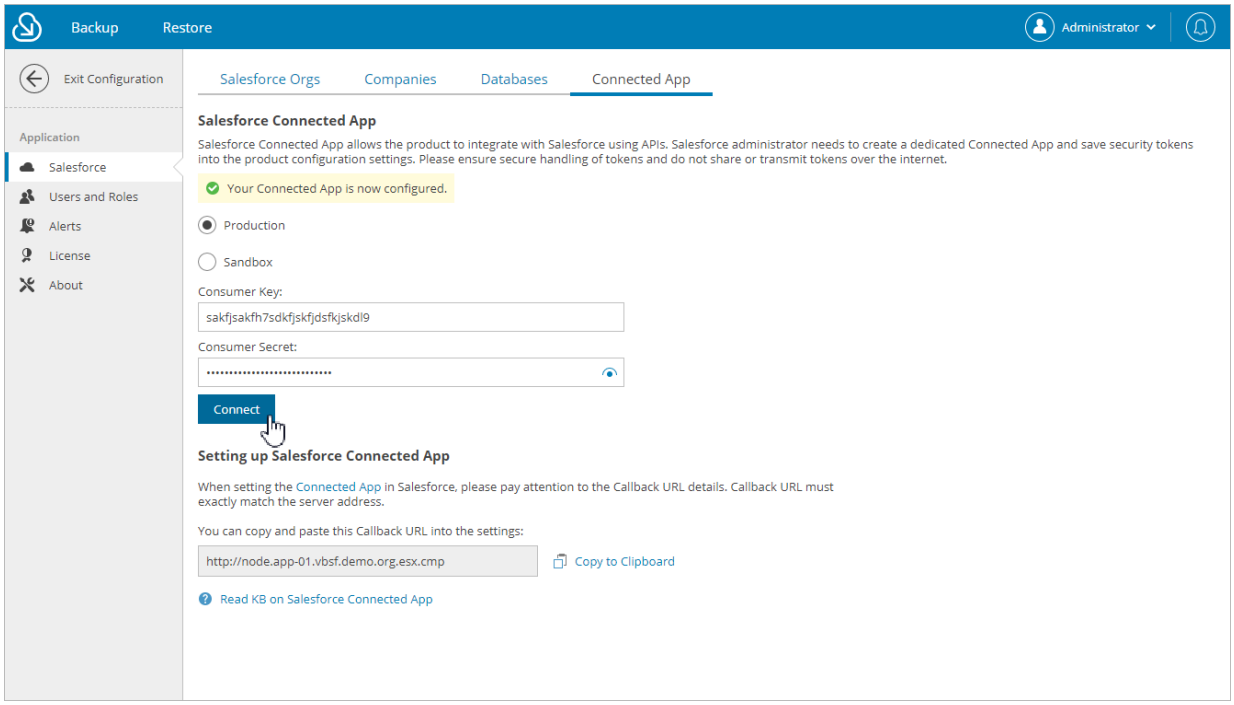
To change the OAuth tokens, do the following:

1. Switch to the **Configuration** page.
2. Navigate to **Salesforce** > **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**.

IMPORTANT

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.
- The callback URL specified in the Connected App settings must exactly 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.



Configuring Advanced Settings

You can get acquainted with 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**.

> **IMPORTANT**
>
> Changing the default advanced settings may result in unsupported or unusable product configuration. Do not change the settings unless it is advised by the Veeam Customer Support Team. If you accidentally changed one or more settings, you can click **Reset All to Default**.

The list shows key settings and their values, for example:

- `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).
- `fields.restore.max.input.records` — the number of records for which field values that can be selected for one restore session.

Performing 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 which data they have access to.

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 Editing Backup Policies.

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

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:

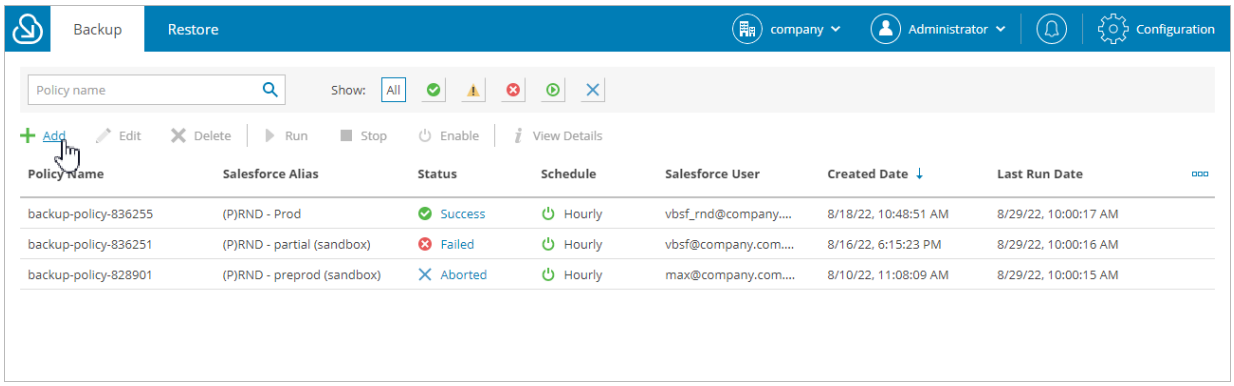
1. Launch the Add Backup Policy wizard.
2. Configure connection to a Salesforce organization.
3. Configure policy schedule and backup options.
4. Enable backup of files and attachments.
5. Configure retention settings.
6. Finish working with the wizard.

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 Adding Companies, and the user must have permissions to access the company. For more information on user permissions, see User Roles and Permissions.



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 whether you will protect an organization hosted on a production or sandbox Salesforce instance.
   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 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 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.

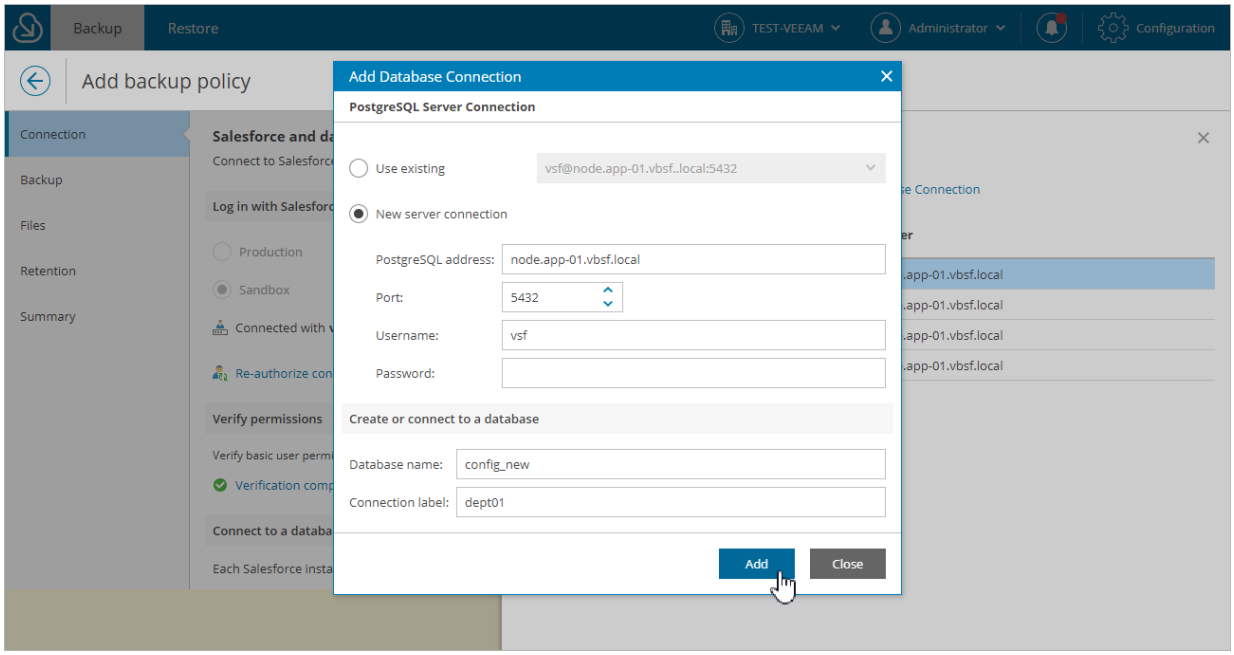
   a. In the **Verify permissions** section, you can verify whether the permissions assigned to the specified user are enough to perform backup and restore operations. To do that, click **Verify permissions** and wait for the check to complete.
   b. In the **Connect to a database** section, choose a database 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 Adding Databases.
      - To specify an already added database, select the database from the list. The **Database** list displays only databases added to Veeam Backup for Salesforce beforehand if these databases are not used to protect any other Salesforce organization. To learn how to add databases, see Adding Databases.

IMPORTANT

You can specify only an empty database to store the backed-up data. One database can be used to protect only one organization. If the specified database contains any data, Veeam Backup for Salesforce will not be able to perform backup.



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

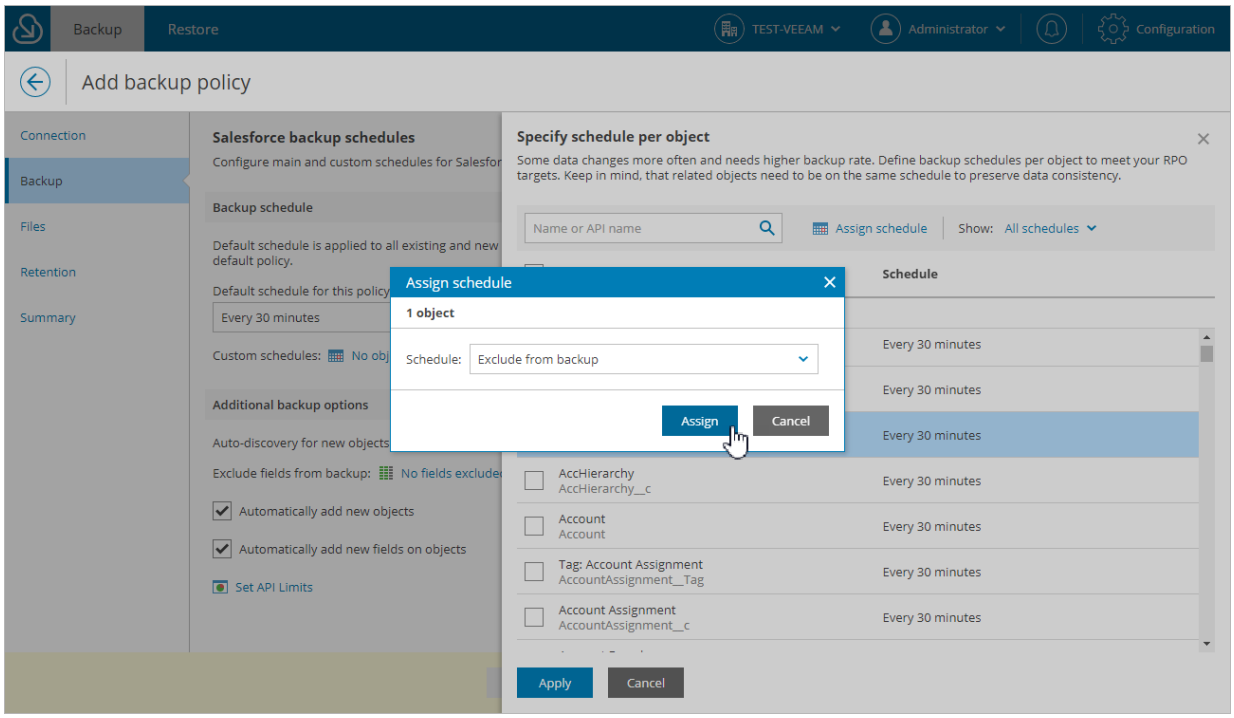
If some objects are updated frequently and need to be backed up more or less often than other objects belonging to the protected Salesforce organization, you can assign custom schedules to these objects. Veeam Backup for Salesforce will launch a distinct backup session to protect each group of objects 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.



Creating Schedules

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**.

   The **Manage Schedules** window will open.

2. In the **Manage Schedules** window, click **Add New Schedule**.

   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. 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.

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.

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 to 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.

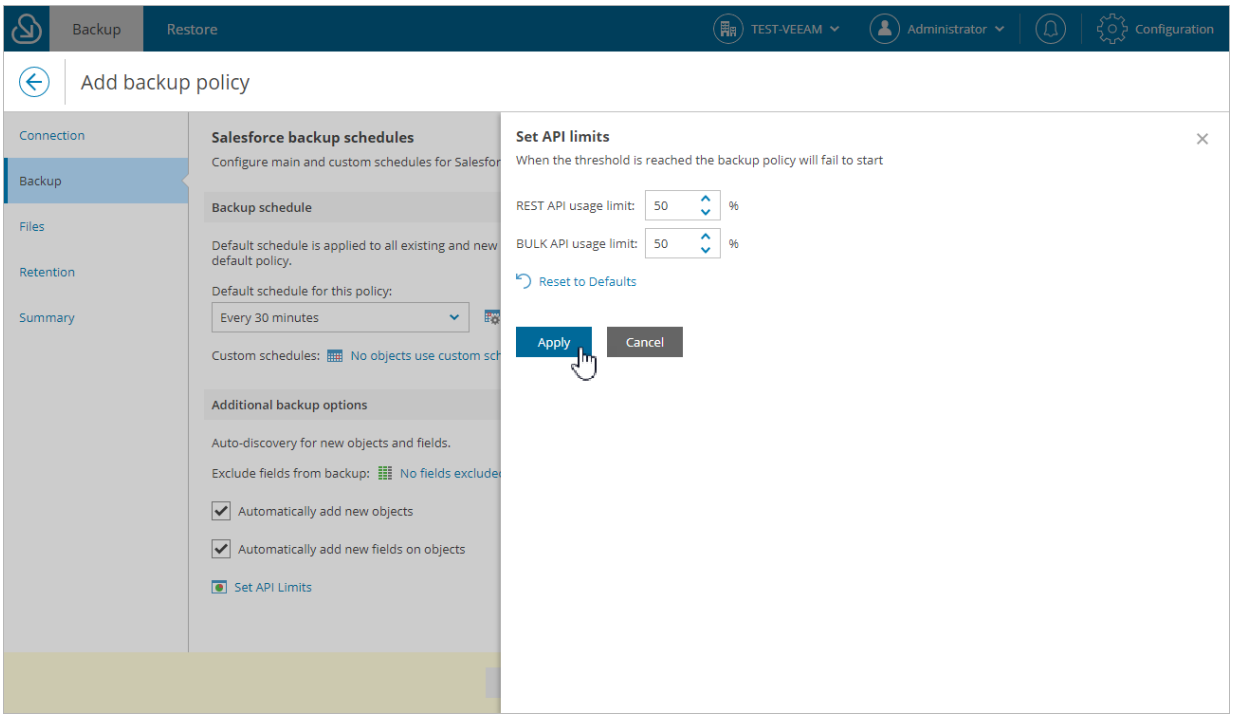
To limit API requests sent by Veeam Backup for Salesforce to Salesforce, do the following:

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.



Step 4. Enable Backup of Files and Attachments

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:
>
> - The location used to store backed up files and folders is created automatically by Veeam Backup for Salesforce for each organization and cannot be changed manually by a user. If you remove the backup policy and then create a new policy for the same organization, Veeam Backup for Salesforce will use the same location for this organization.
> - It is recommended to 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.

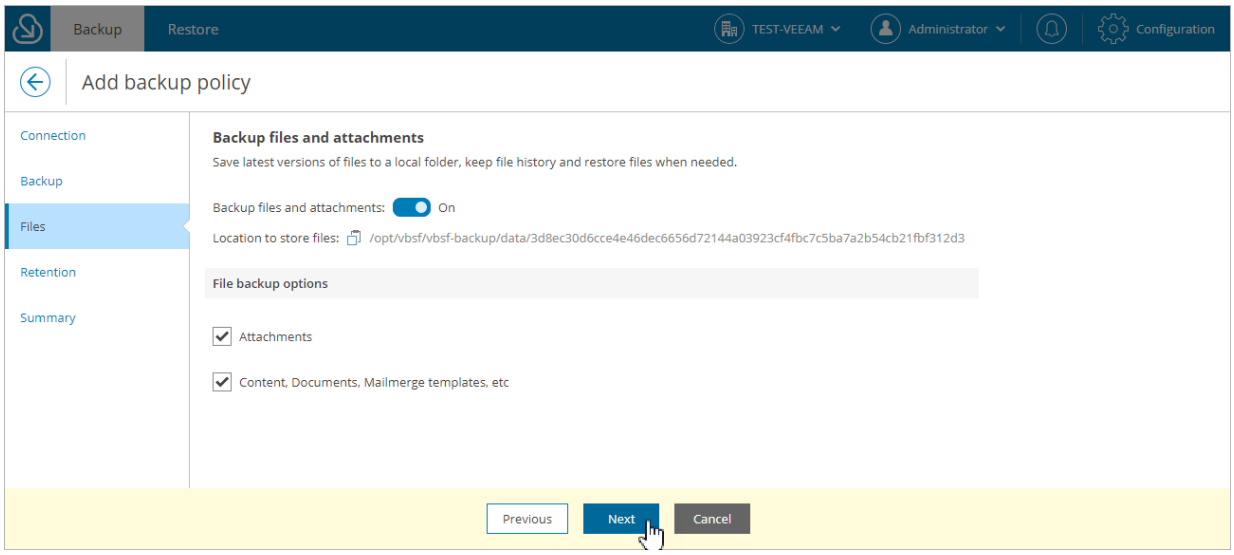
2. In the **File backup options** section:
   - To back up Salesforce Attachment Objects, select the **Attachments** check box.
   - To back up the Salesforce Content, select the **Content, Documents, Mailmerge templates, etc** check box. Veeam Backup for Salesforce will back up all types of Content such as *EmailCapture*, *MobileApplicationDetail*, *MailmergeTemplate*, *QuoteDocument*, *ContentNote*, *ContentDocument*, *ContentVersion*, *Document*.

IMPORTANT

In Veeam Backup for Salesforce v1, you can back up but cannot restore using in-built product functionality the following types of content:

- EmailCapture
- MobileApplicationDetail
- MailmergeTemplate
- QuoteDocument
- ContentNote

The restore functionality for these content types will be added in forthcoming versions.



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.

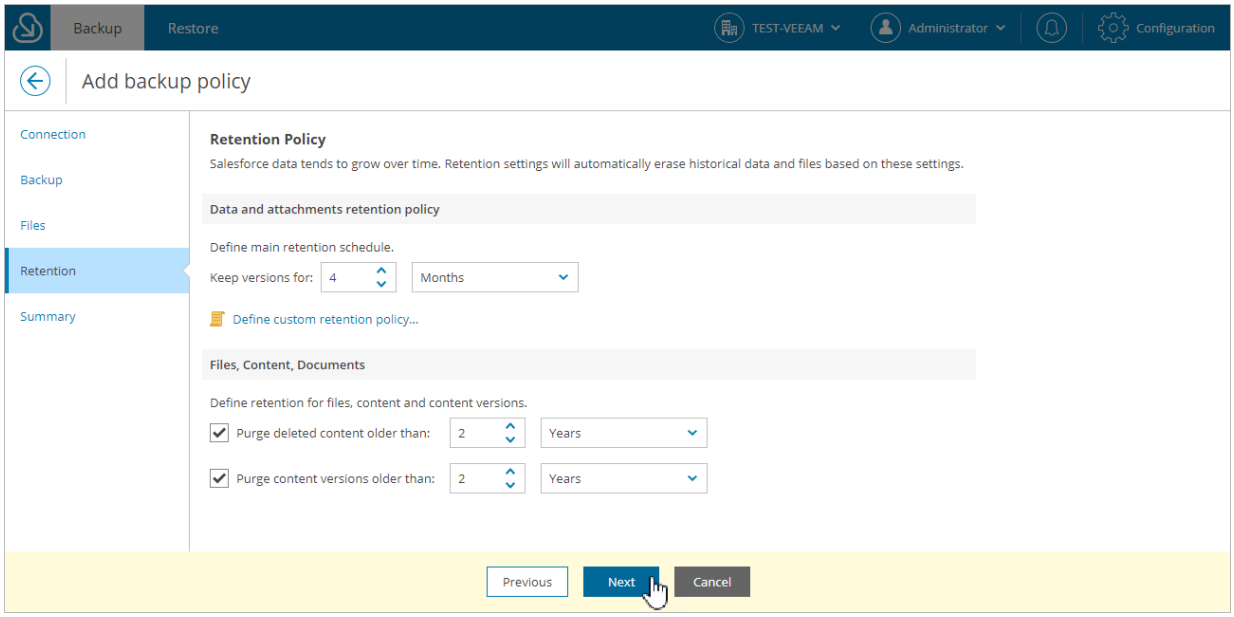
   b. If you want to configure specific retention settings for different objects protected by the backup policy, click the **Define custom retention policy** link.

      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.

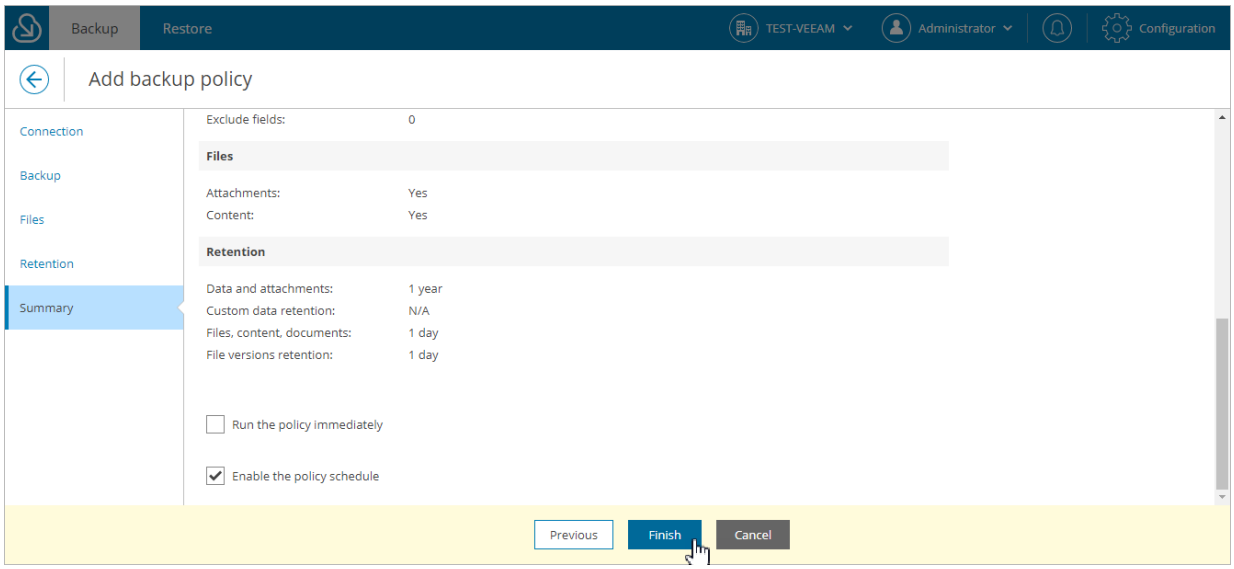
- To instruct Veeam Backup for Salesforce to remove backups of file versions, select the **Purge content versions older than** check box and specify the period after which the outdated versions will be removed.



Step 6. Finish Working with Wizard

At the **Summary** step of the wizard, review configured settings and do the following:

1. If you want Veeam Backup for Salesforce to run the policy right after you complete the wizard, select the **Run the policy immediately** check box.
2. If you want Veeam Backup for Salesforce to run the policy according to schedules configured at step 3, select the **Enable the policy schedule** check box. You will be able to disable or enable the policy later as described in section Disabling and Enabling Backup Policies.
3. Click **Finish**.



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:

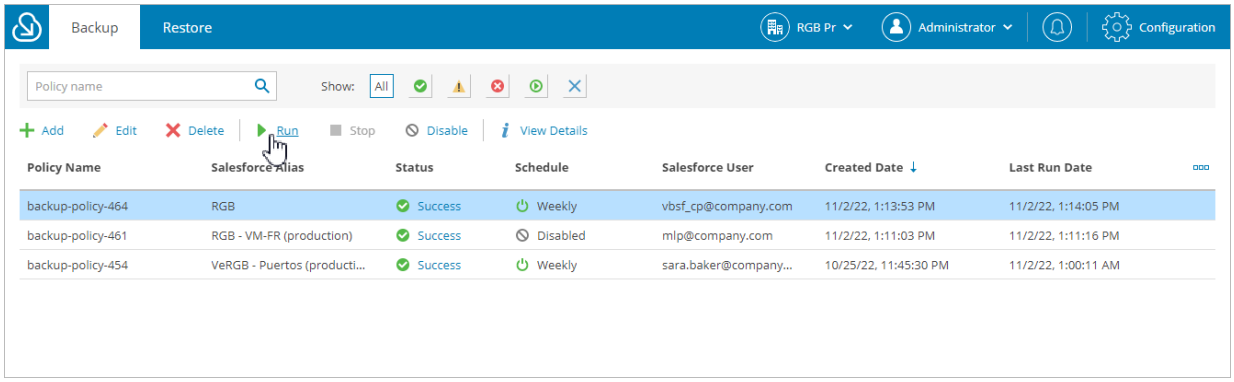
1. Navigate to the **Backup** tab.
2. Select the necessary backup policy.

> **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**.

   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.



Disabling and Enabling Backup Policies

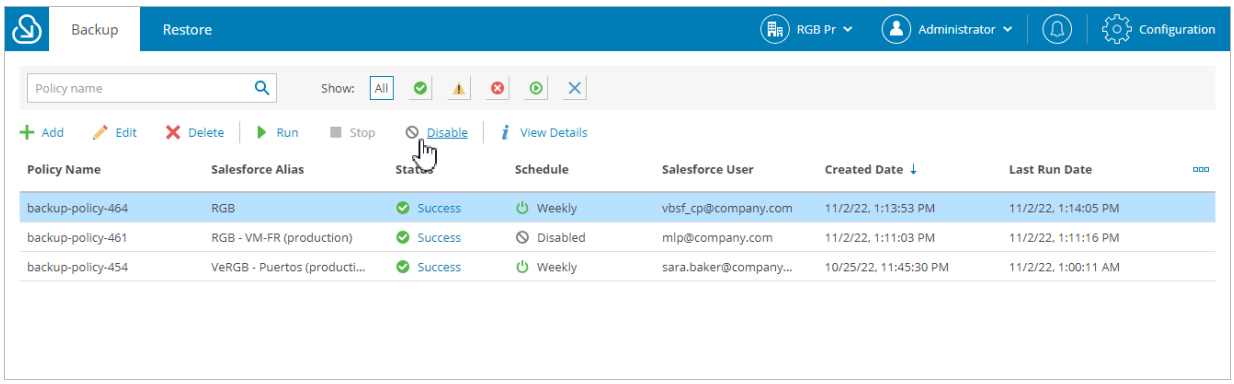
By default, Veeam Backup for Salesforce runs all created backup policies according to the specified schedules. However, you can temporarily disable a backup policy so that Veeam Backup for Salesforce does not run the backup policy automatically. You will still be able to manually start or enable the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



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.

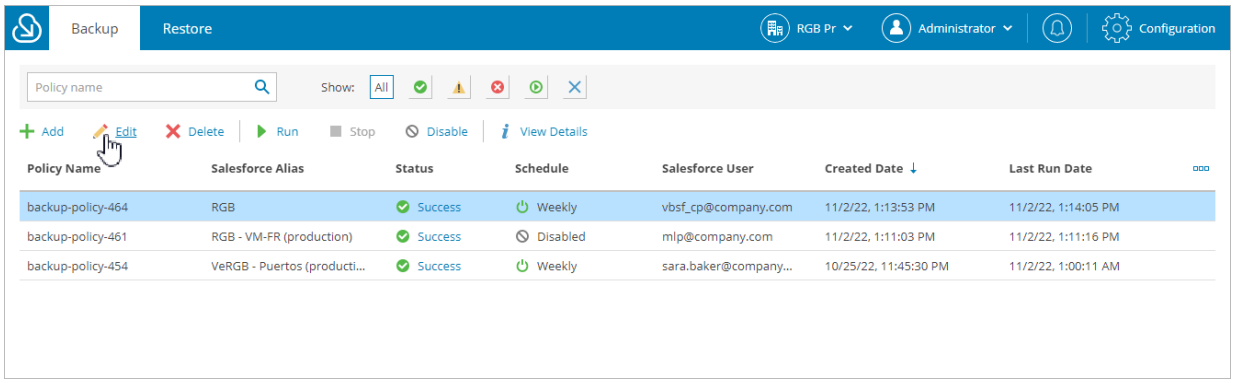
To edit backup policy settings, do the following:

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 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.



Removing Backup Policies

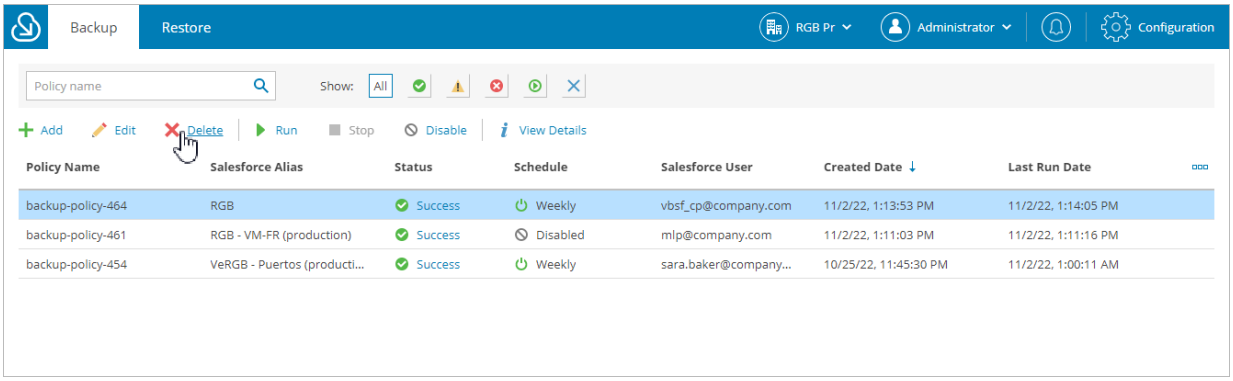
You can permanently remove a backup policy from Veeam Backup for Salesforce. Note that the backed-up data will not be automatically deleted as soon as you remove the policy.

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. Click **Delete**.



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 policy sessions, click the link in the **Status** column. For more information, see Viewing Policy Session Statistics.
- **Schedule** – the type 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.

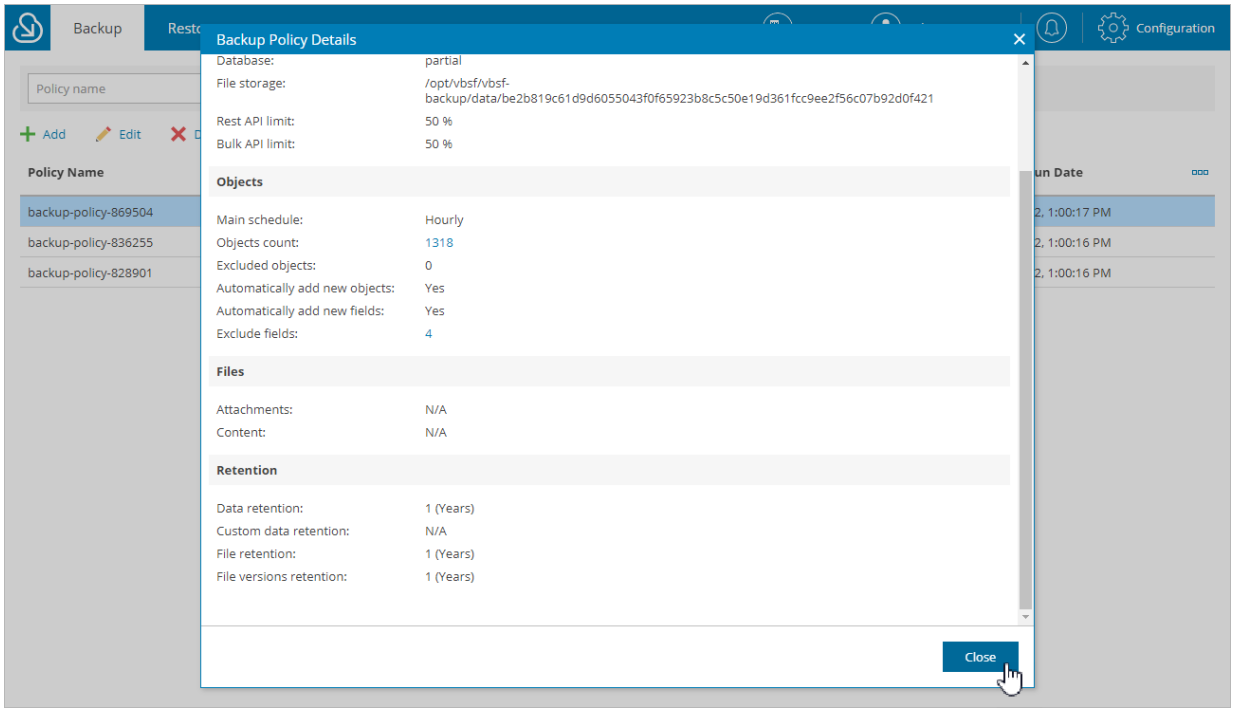
You can view settings configured for a specific backup policy:

1. From the company drop-down list at the top of the page, select the company to which the backup policy belongs.

   For a company to be displayed in the list, the currently logged in Veeam Backup for Salesforce user must have permissions to access the company. For more information on user permissions, see User Roles and Permissions.
2. Navigate to the **Backup** tab.
3. Select the necessary backup policy.

4. Click **View Details**.

   The **Backup Policy Details** window will open.



Viewing Policy Sessions

For each performed data protection operation, Veeam Backup for Salesforce starts a new session according to the schedules specified in backup policies, 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 session.
- **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 policy run (defines whether the policy has been launched manually or automatically by schedule).

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.

To see the detailed information on an object-related part of the session:

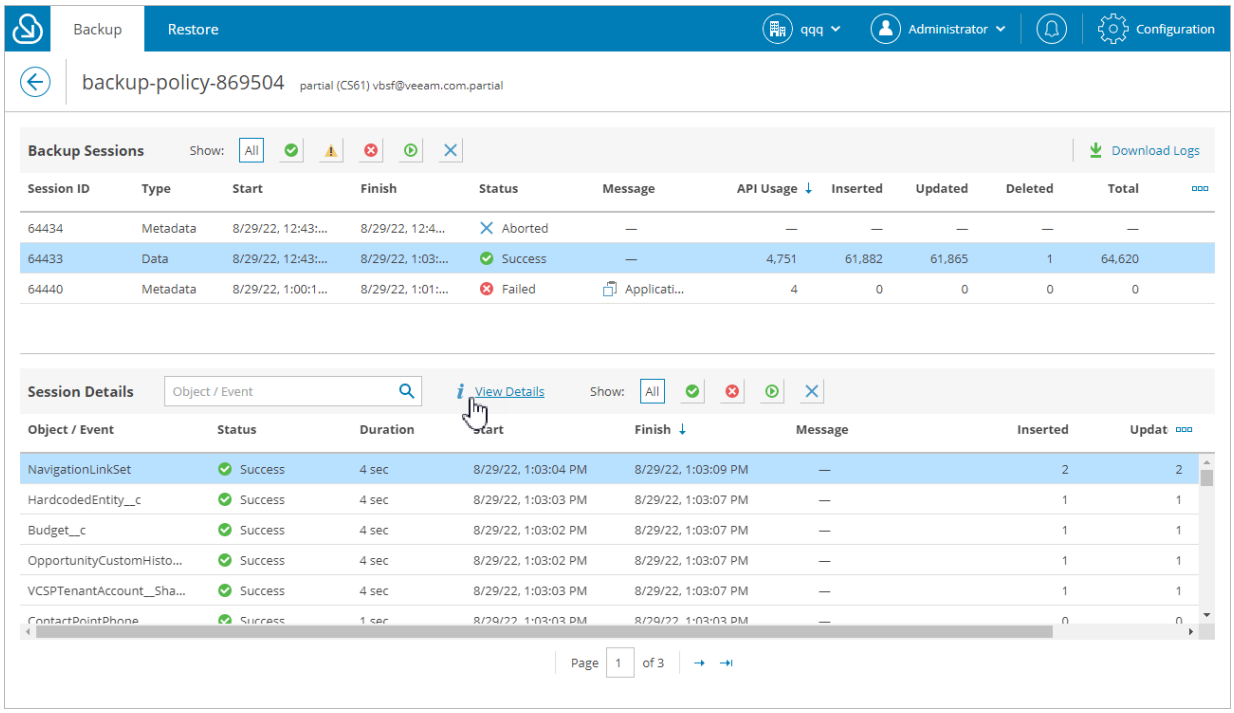
1. From the company drop-down list at the top of the page, select the company to which the backup policy belongs.

   For a company to be displayed in the list, the currently logged in Veeam Backup for Salesforce user must have permissions to access the company. For more information on user permissions, see User Roles and Permissions.

2. Navigate to the **Backup** tab.
3. Select the necessary session.
4. Click **View Details**.

   The **Session Details** window will open.

> **TIP**
>
> 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.



Performing 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
- 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 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. By default, you can select up to 100 000 of records for this type of the restore job if hierarchy restore is disabled, and only up to 10 records if hierarchy restore is enabled. For more information on restore limits, see Configuring Advanced Settings.
- 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. By default, you can select up to 500000 of records for this type of the restore job. For more information on restore limits, see Configuring Advanced Settings.
- 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:

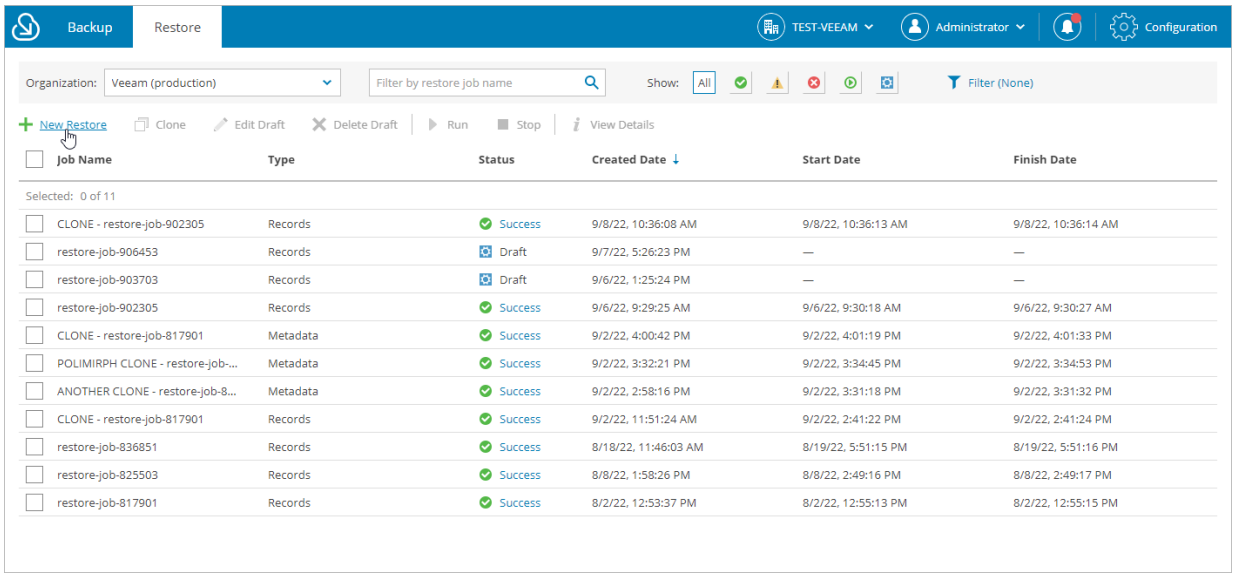
1. Launch the restore job configuration wizard.
2. Specify a name and description for the restore job.
3. Choose the restore type.
4. Select a Salesforce organization.
5. Choose the data that will be restored.
6. Choose what attachments associated with the specified records will be restored.
7. Enable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

Step 1. Launch Restore Job Configuration Wizard

To launch the restore job configuration wizard:

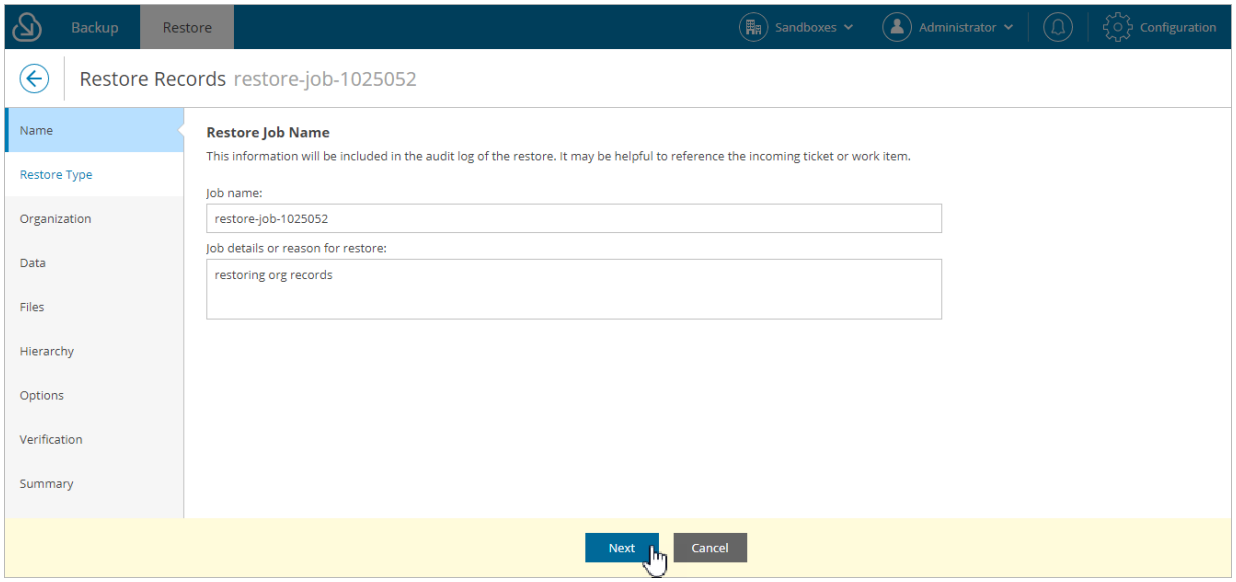
1. Navigate to the **Restore** tab.
2. Click **New Restore**.

> **NOTE**
>
> If you have added multiple companies to Veeam Backup for Salesforce, before you launch the restore job configuration 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 Adding Companies, and the user must have permissions to access the company. For more information on user permissions, see User Roles and Permissions.



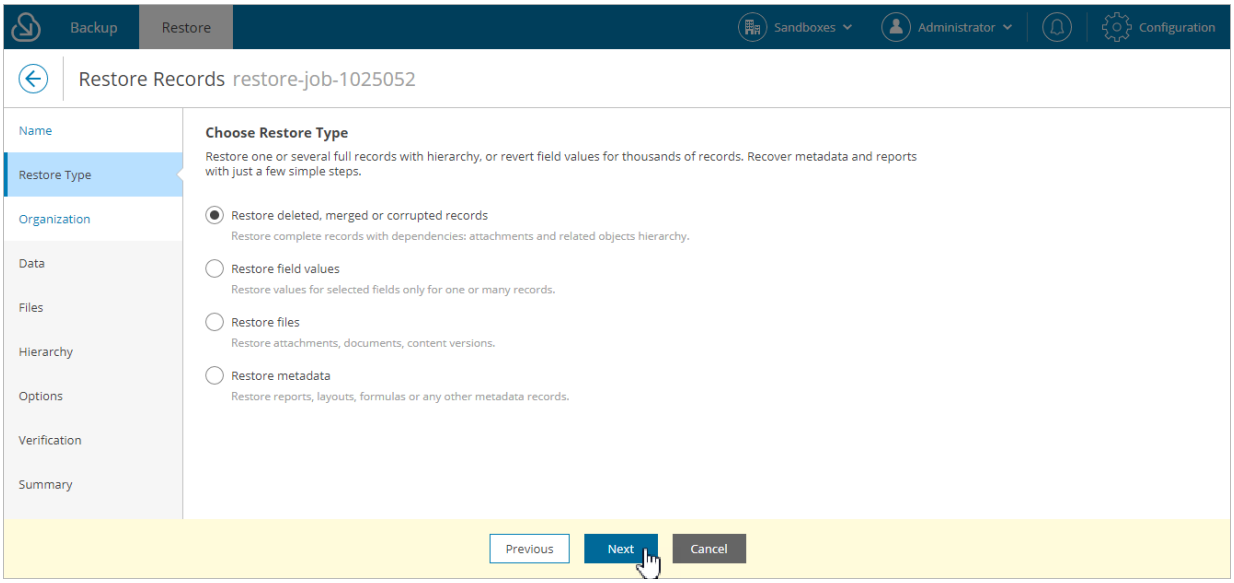
Step 2. Specify Restore Job Info

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.



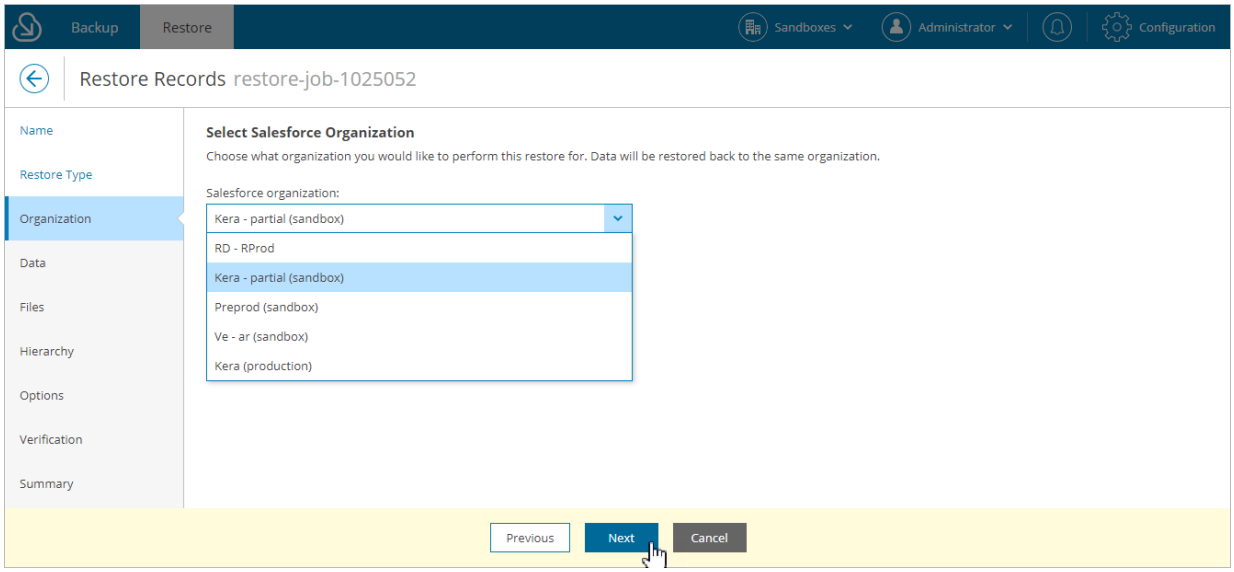
Step 3. Choose Restore Type

At the **Restore Type** step of the wizard, select **Restore deleted, merged or corrupted records**.



Step 4. Select Organization

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



Step 5. 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.

> **TIP**
>
> This step is available in 2 layouts, you can choose the one that is more convenient for you. To change the layout, click the **Change layout** icon at the top of the page.

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 the *Latest records* option, Veeam Backup for Salesforce will perform search only through the last retrieved record states.
      - If you select the *History records* option, 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 the link in the **Display Fields** field and select the necessary Salesforce fields in the **Display Fields** window.
2. Apply additional search conditions using specific filters. To do that, click **Add Condition** in the **Data filters** section, and 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*, *equals*, *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

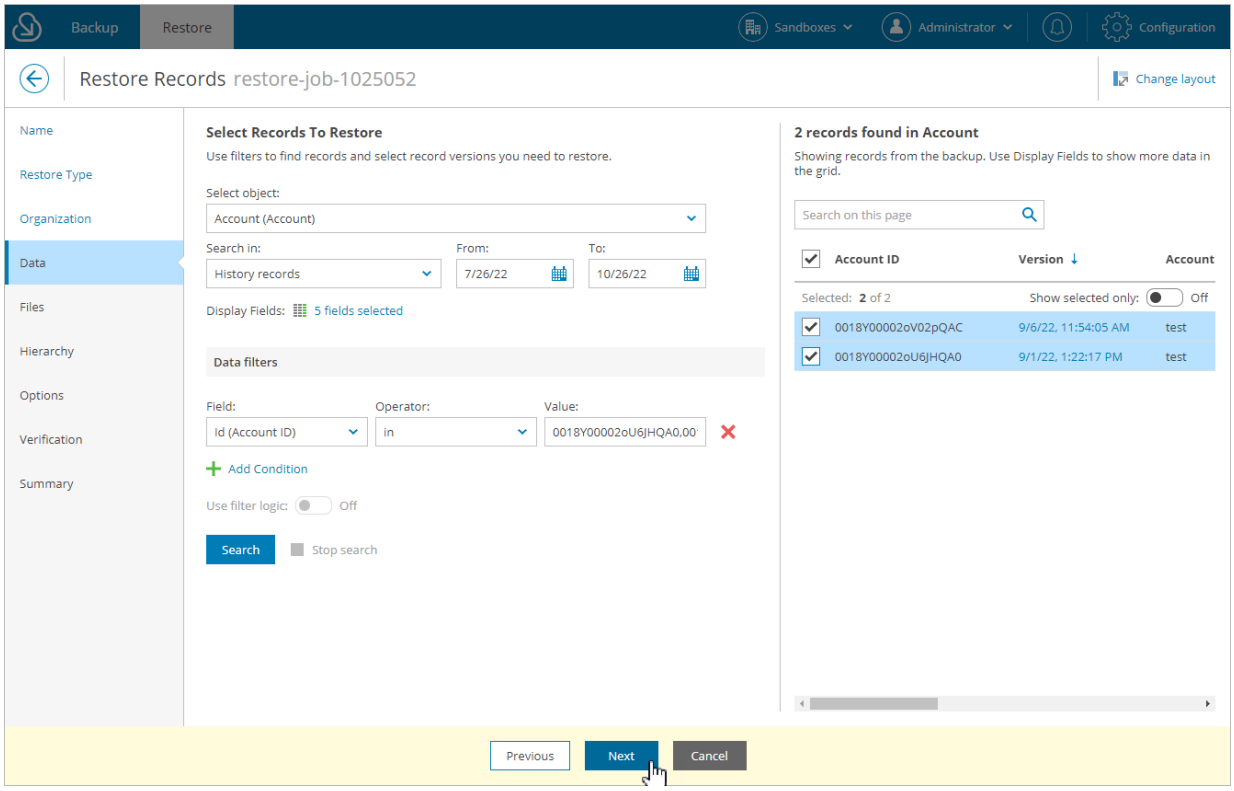
When adding conditions, consider the following:

- 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 an object with which the field is associated.

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**.
4. In the **Records** section, Veeam Backup for Salesforce will show the results satisfying your search parameters. Select the records from the search results. Consider that the section displays the maximum number of 500 records per page. You cannot select and add records to the restore session from different pages. That is why 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, then compare record versions 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*.



Step 6. Choose Attachments to Restore

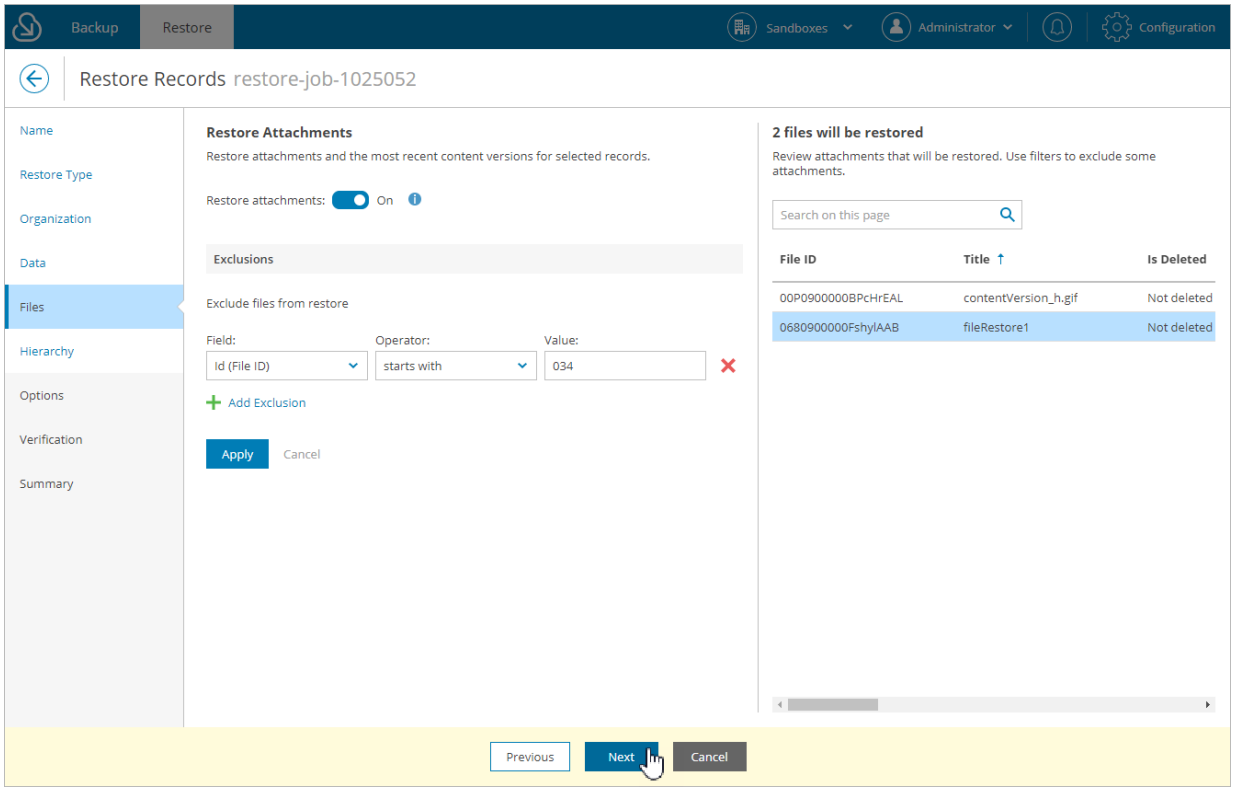
At the **Files** step of the wizard, you can instruct Veeam Backup for Salesforce to restore files associated with the selected records. Salesforce content and attachments will be displayed at this step only if the records that you restore have any associated content or attachments and these files have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



Step 7. Enable Hierarchy Restore

At the **Hierarchy** step of the wizard, Veeam Backup for Salesforce allows you to restore relationships to parent and child objects linked to the record that you want to restore.

Hierarchy object restore is based on processing the lookup relationship fields of the records. When restoring relationships, Veeam Backup for Salesforce searches for all records that link to the restored record, and does the following:

- If a child record exists in Salesforce, the product updates the lookup field value of the child record and does not proceed to deeper levels of the hierarchy from this child record, assuming that the lower hierarchy is correct for this existing record.
- If a child record does not exist, the product restores the missing record using the most relevant backup version, and then continues verifying child hierarchy at deeper levels.

Consider the following example: in a backup, an **Account** object has 3 **Contacts**. A user has selected to restore the *[Account] [Contact]* and *[Account] [Contact] [Task]* hierarchy branches. In this case, Veeam Backup for Salesforce will perform the following operations during restore:

1. Restore/overwrite the **Account** record.
2. Check whether **Contact** records exist — 2 **Contacts** have been found in our example.
3. Update the lookup field values for the existing 2 **Contacts** and stop processing deeper levels for these records.
4. Restore the 3rd **Contact** and proceed with restoring the **Task** object records for this **Contact**.

Restoring Lookup Relationships

To restore lookup relationships for the records selected at step 5 of the wizard, do the following:

1. Set the **Restore object 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 10 Salesforce records to recover in one restore session. You can modify the default restore limits as described in 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 to which you want to restore relationships. Veeam Backup for Salesforce will restore relationships only to objects that you have selected — if you do not expand the object node, objects under the node remain unselected and relationships to these objects will not be restored.

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

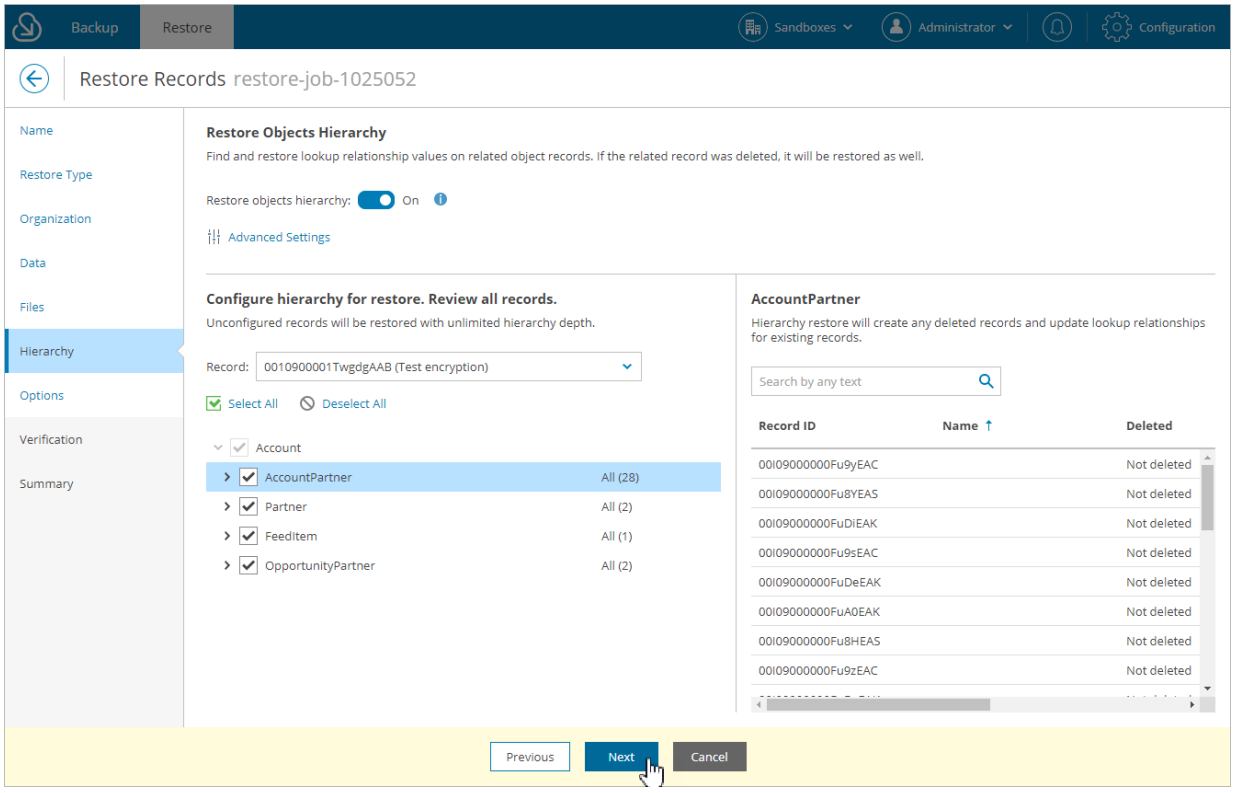
IMPORTANT

You must review all records in the **Configure hierarchy for restore** section. For the records that have not been reviewed, Veeam Backup for Salesforce will restore the complete child hierarchy to an unlimited depth.

3. To specify the number of parent hierarchy levels that must be restored for all records, click **Advanced Settings** under the **Restore objects hierarchy** toggle. In the **Advanced Hierarchy Settings** window, select the maximum level of the parent object hierarchy. By default, Veeam Backup for Salesforce restores only one parent relationship level.

NOTE

You must consider that the advanced hierarchy settings are applied to every restored record in the session not only to the records selected at step 5 of the wizard. It means that if Veeam Backup for Salesforce does not find a child record in Salesforce, it will restore the record and then will verify lookup links to it parent records. This process will repeat for all child records that are missing from Salesforce and created by the restore job.



Step 8. 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/overwrite all field values for existing records** check box.

   If you want Veeam Backup for Salesforce to replace the Salesforce existing values with the *NULL* values, select the **Restore NULL values. Permit overwriting existing data with NULL values** 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.

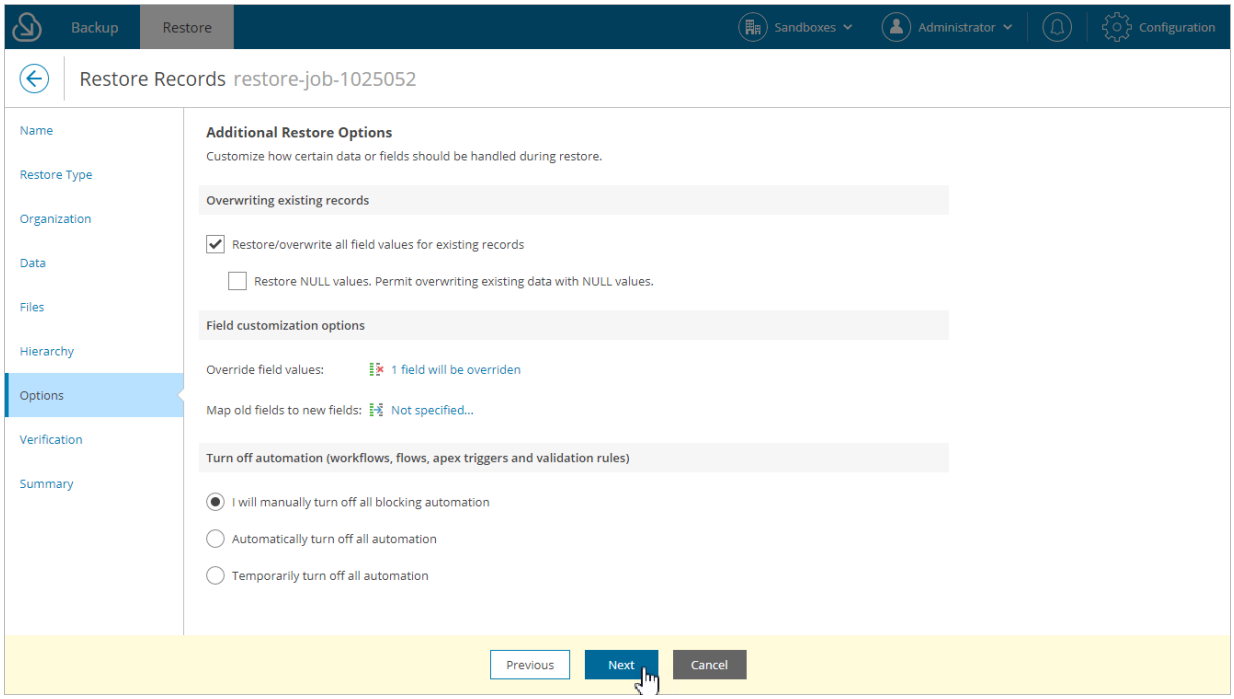
3. You can map fields to other Salesforce fields if you want to restore the values from the backup to the different fields. To do that, click **Map old fields to new fields**. In the **Map fields** window, click **Add field**, select the field from backup that you want to map to a new one, and specify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

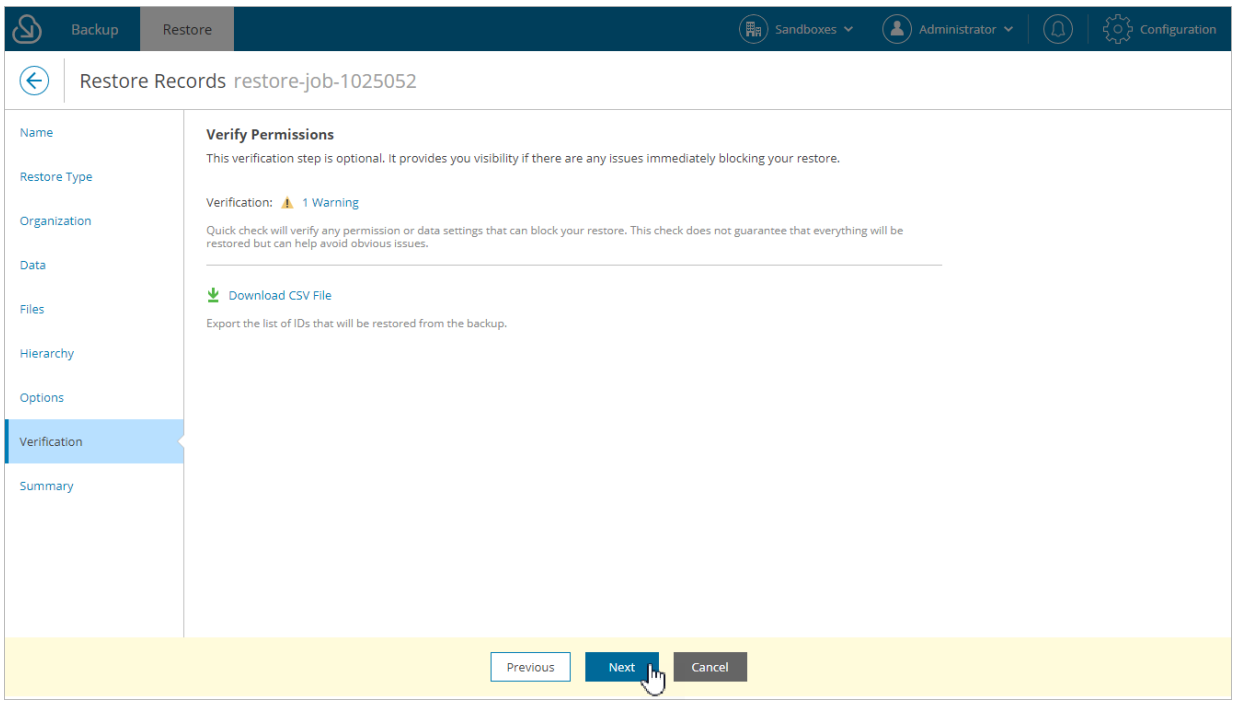
- Select the **Temporarily turn off all automation** option, to temporarily disable all blocking automation for the Salesforce user whose permissions are used to perform backup and restore operations. The automation functionality will be disabled only for the restore operation duration, and then it will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



Step 9. Check Permissions

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

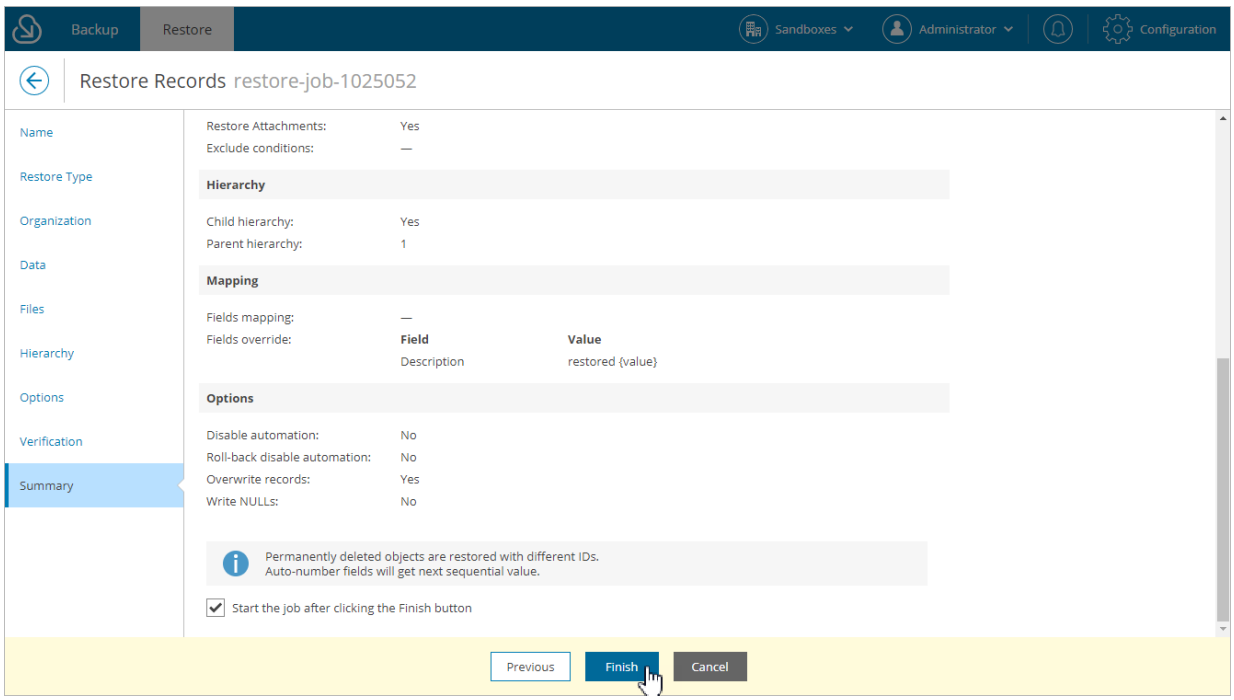
To export the list of Salesforce IDs of the objects that are included in the restore job, click **Download CSV File**. Veeam Backup for Salesforce will export all object IDs to a CSV file and download it to your local machine.



Step 10. 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.



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:

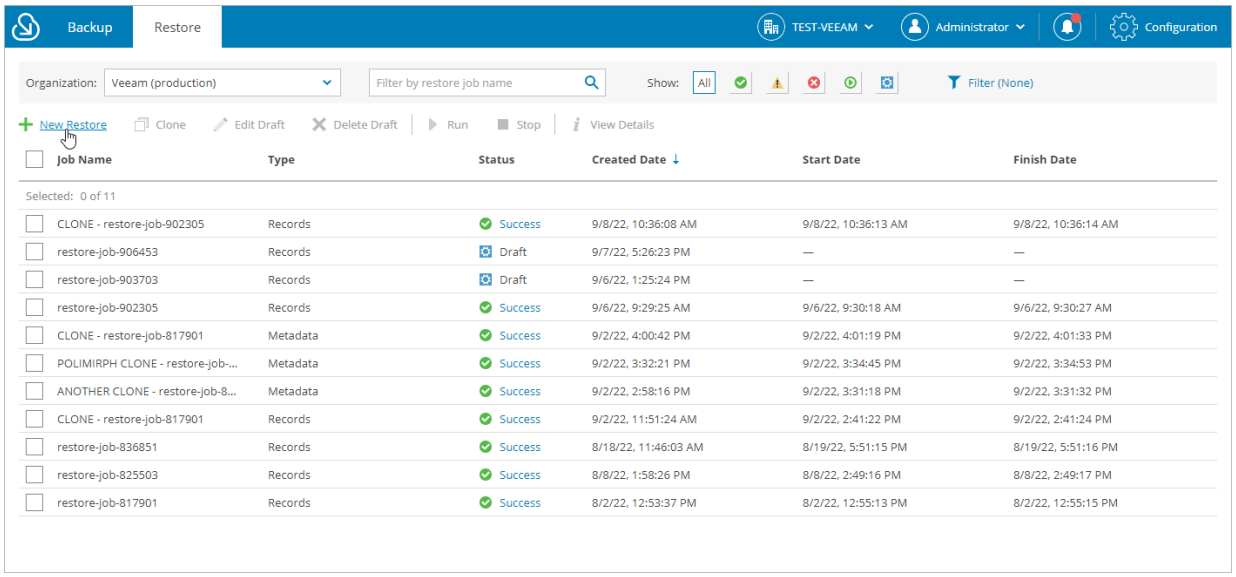
1. Launch the restore job configuration wizard.
2. Specify a name and description for the restore job.
3. Choose the restore type.
4. Select a Salesforce organization.
5. Select records whose field values you want to restore.
6. Select fields whose values will be restored.
7. Configure additional restore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

Step 1. Launch Restore Job Configuration Wizard

To launch the restore job configuration wizard:

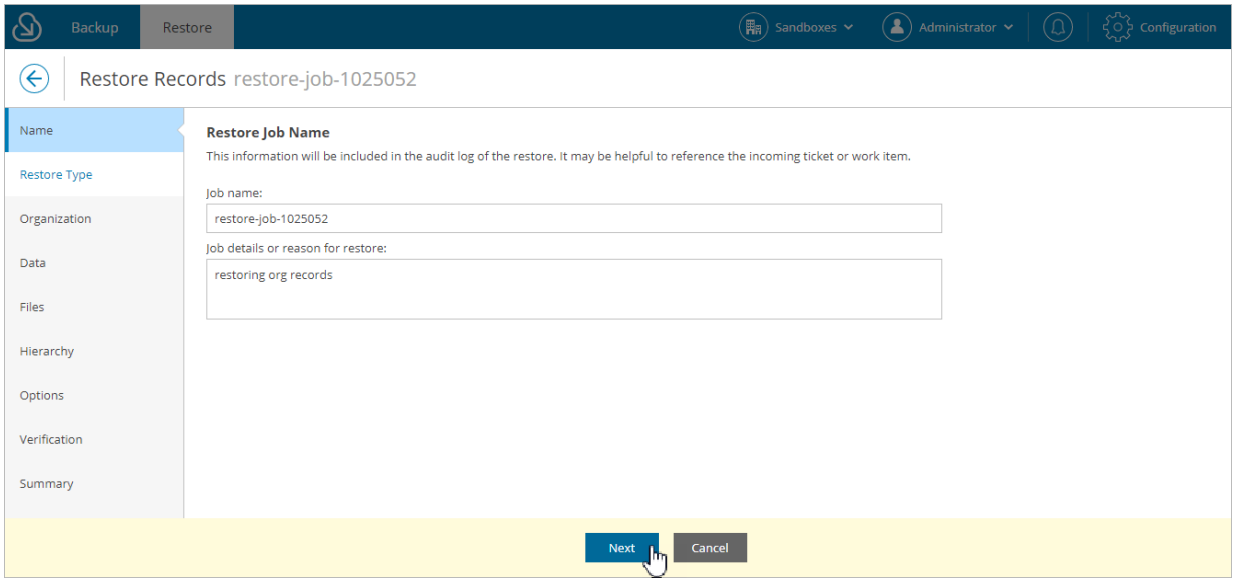
1. Navigate to the **Restore** tab.
2. Click **New Restore**.

> **NOTE**
>
> If you have added multiple companies to Veeam Backup for Salesforce, before you launch the restore job configuration 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 Adding Companies, and the user must have permissions to access the company. For more information on user permissions, see User Roles and Permissions.



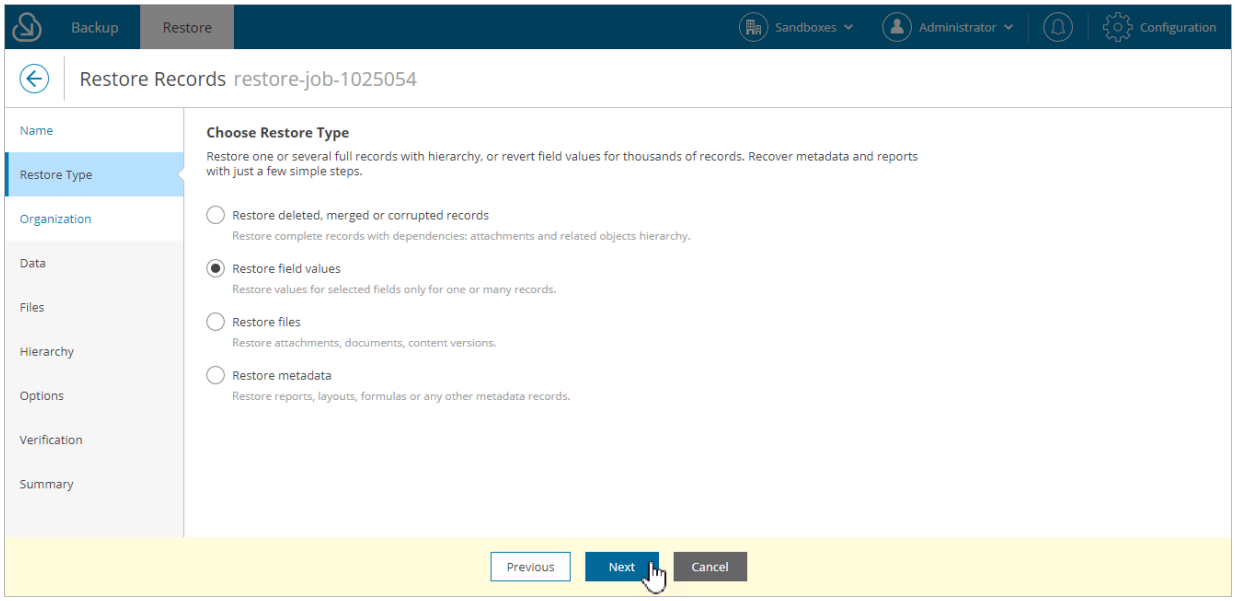
Step 2. Specify Restore Job Info

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.



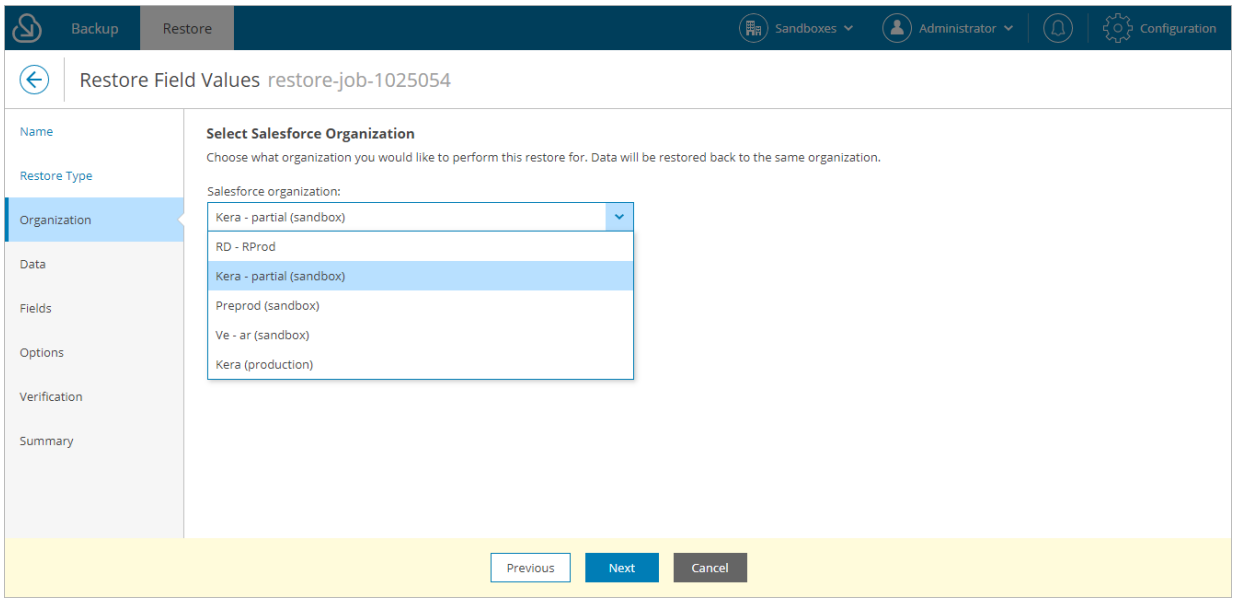
Step 3. Choose Restore Type

At the **Restore Type** step of the wizard, select **Restore field values**.



Step 4. Select Organization

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



Step 5. 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.

> **TIP**
>
> This step is available in 2 layouts, you can choose the one that is more convenient for you. To change the layout, click the **Change layout** icon at the top of the page.

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 the *Latest records* option, Veeam Backup for Salesforce will perform search only through the last retrieved record states.
      - If you select the *History records* option, 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 the link in the **Display Fields** field and select the necessary Salesforce fields in the **Display Fields** window.
2. Apply additional search conditions using specific filters. To do that, click **Add Condition** in the **Data filters** section, and 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*, *equals*, *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

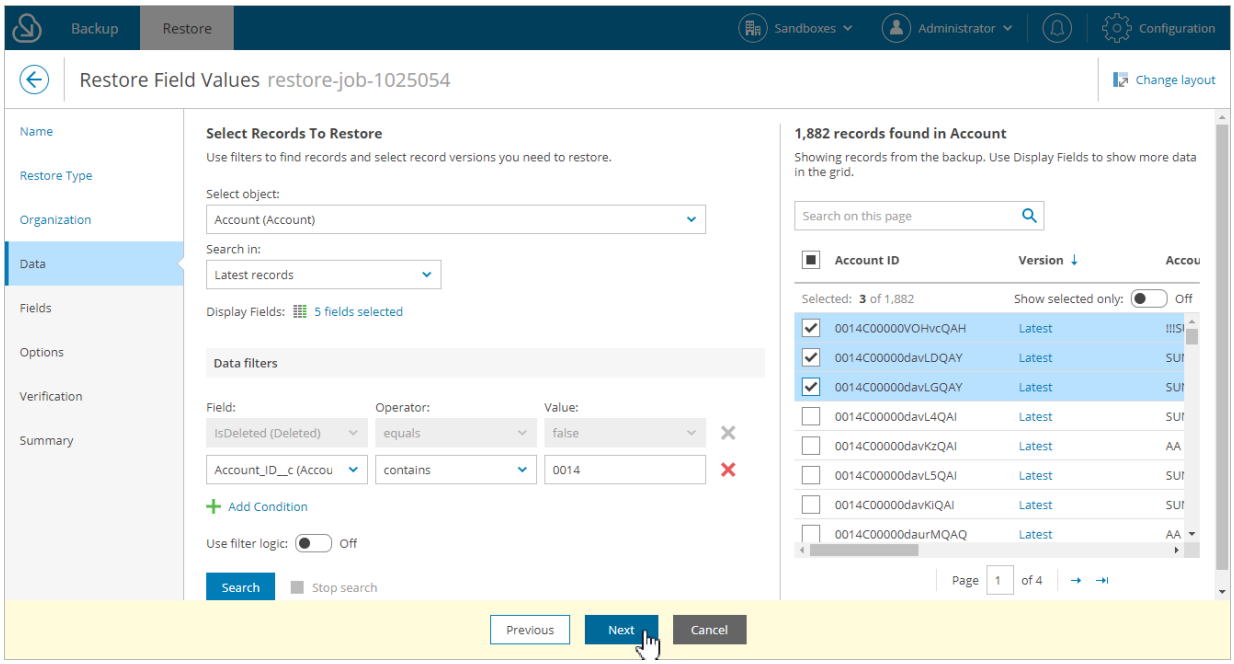
When adding conditions, consider the following:

- 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 an object with which the field is associated.

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**.
4. In the **Records** section, Veeam Backup for Salesforce will show the results satisfying your search parameters. Select the records from the search results. Consider that the section displays the maximum number of 500 records per page. You cannot select and add records to the restore session from different pages. That is why 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, then compare record versions 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*.

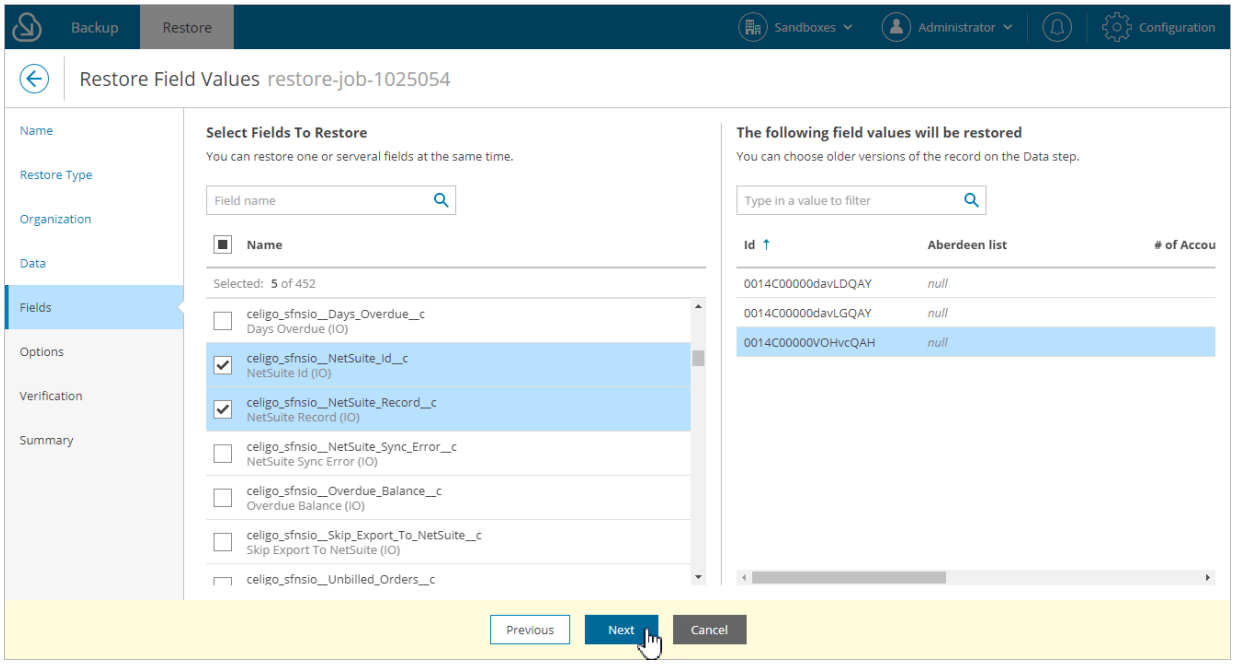


Step 6. Select Fields to Restore

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.

To look through the values that will be restored for the selected records in a specific field, select the necessary field. Veeam Backup for Salesforce will display the values in the **The following field values will be restored** section.



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 during restore, select the **Restore/overwrite all field values for existing records** check box.

   If you want Veeam Backup for Salesforce to replace the Salesforce existing values with the *NULL* values, select the **Restore NULL values. Permit overwriting existing data with NULL values** 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.

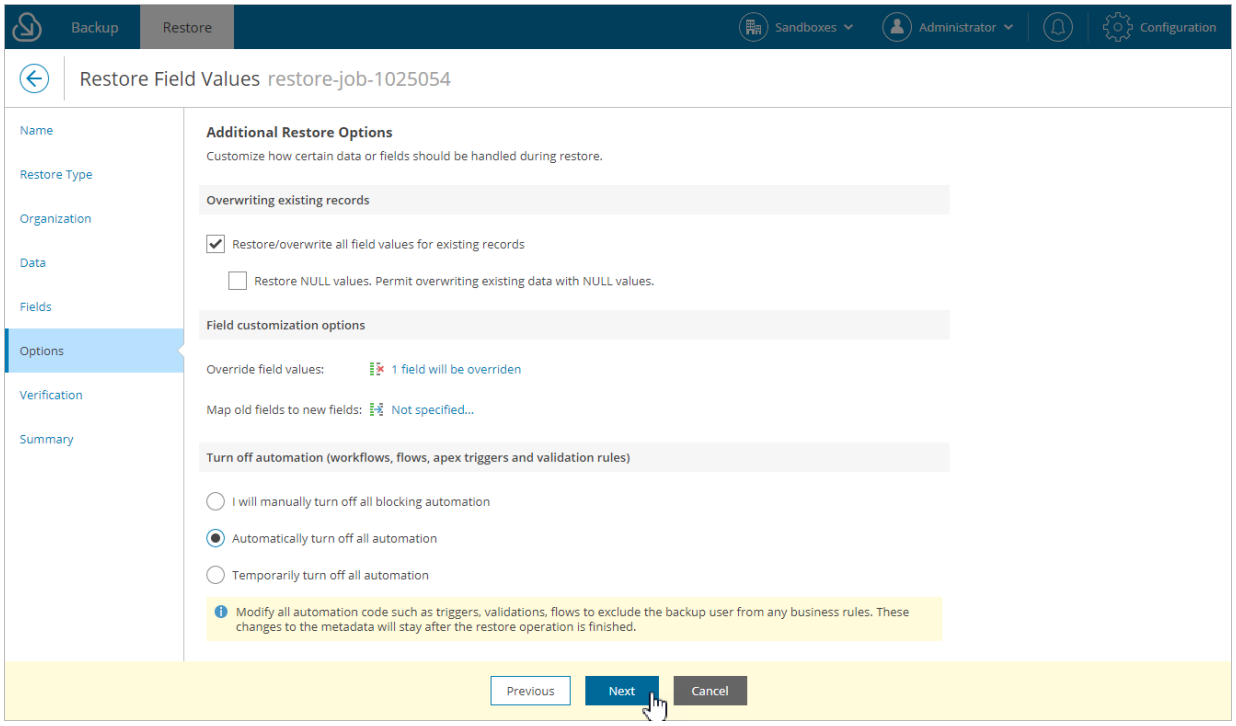
3. You can map fields to other Salesforce fields if you want to restore the values from the backup to the different fields. To do that, click **Map old fields to new fields**. In the **Map fields** window, click **Add field**, select the field from backup that you want to map to a new one, and specify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

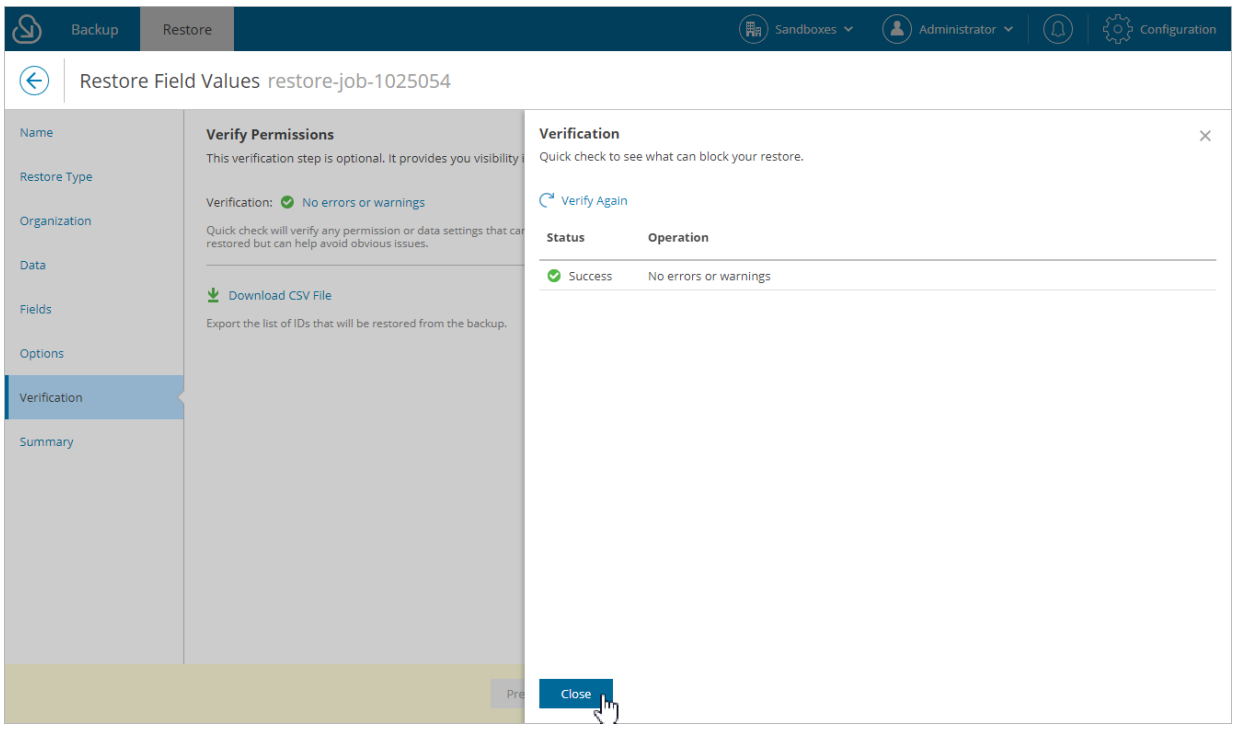
- Select the **Temporarily turn off all automation** option, to temporarily disable all blocking automation for the Salesforce user whose permissions are used to perform backup and restore operations. The automation functionality will be disabled only for the restore operation duration, and then it will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



Step 8. Check Permissions

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

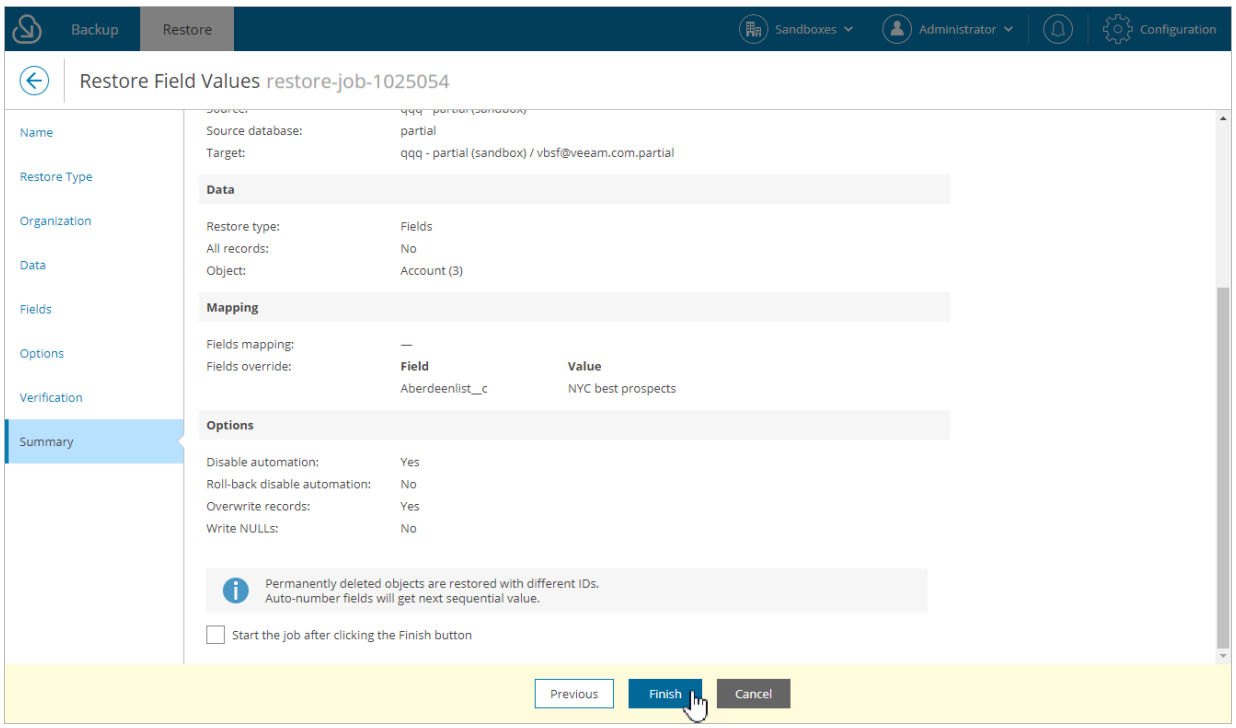
To export the list of Salesforce IDs of the objects that are included in the restore job, click **Download CSV File**. Veeam Backup for Salesforce will export all object IDs to a CSV file and download it to your local machine.



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.



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 *EmailCapture*, *MobileApplicationDetail*, *MailmergeTemplate*, *QuoteDocument* and *ContentNote* types of content is not supported in Veeam Backup for Salesforce v1.
> - Restore of images in a rich-text format field is not supported in Veeam Backup for Salesforce v1.

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

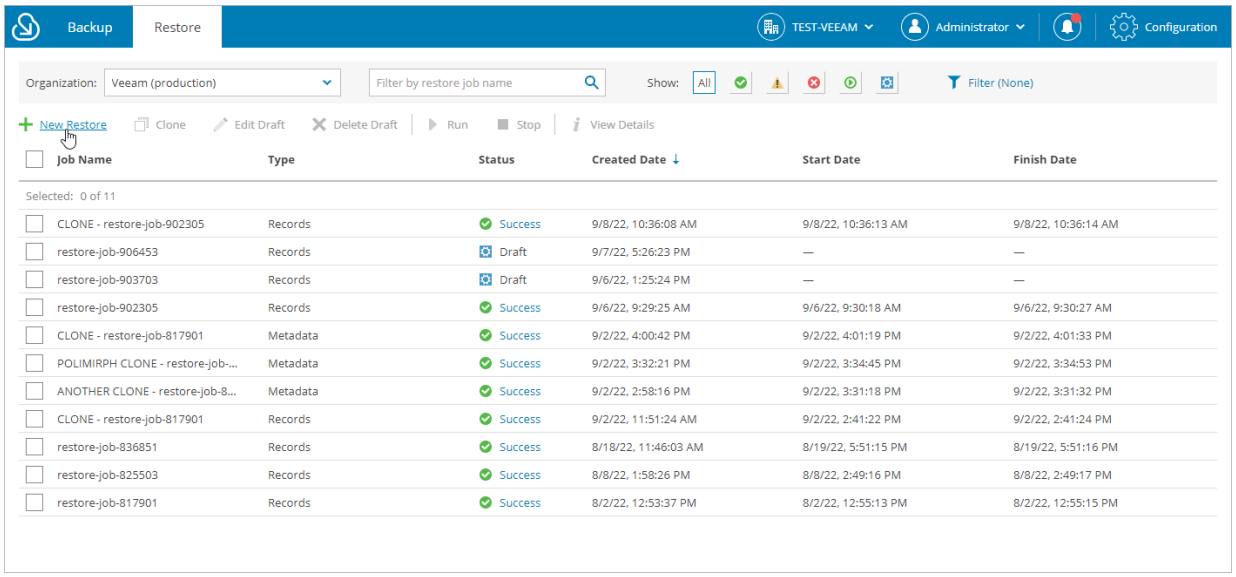
1. Launch the restore job configuration wizard.
2. Specify a name and description for the restore job.
3. Choose the restore type.
4. Select a Salesforce organization.
5. Select files and attachments to restore.
6. Finish working with the wizard.

Step 1. Launch Restore Job Configuration Wizard

To launch the restore job configuration wizard:

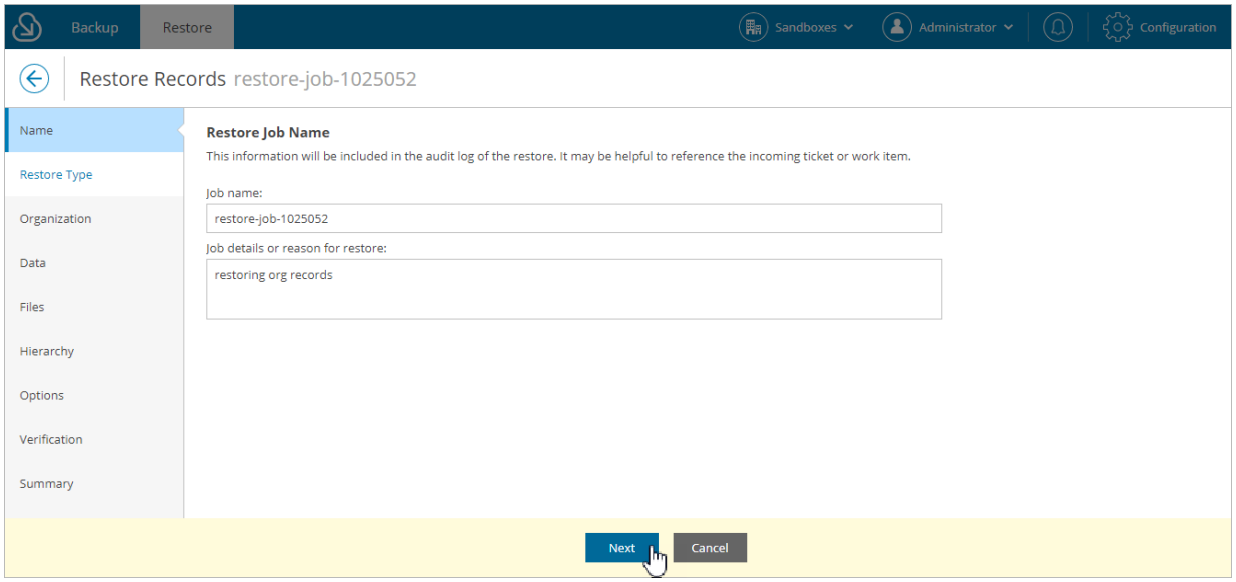
1. Navigate to the **Restore** tab.
2. Click **New Restore**.

> **NOTE**
>
> If you have added multiple companies to Veeam Backup for Salesforce, before you launch the restore job configuration 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 Adding Companies, and the user must have permissions to access the company. For more information on user permissions, see User Roles and Permissions.



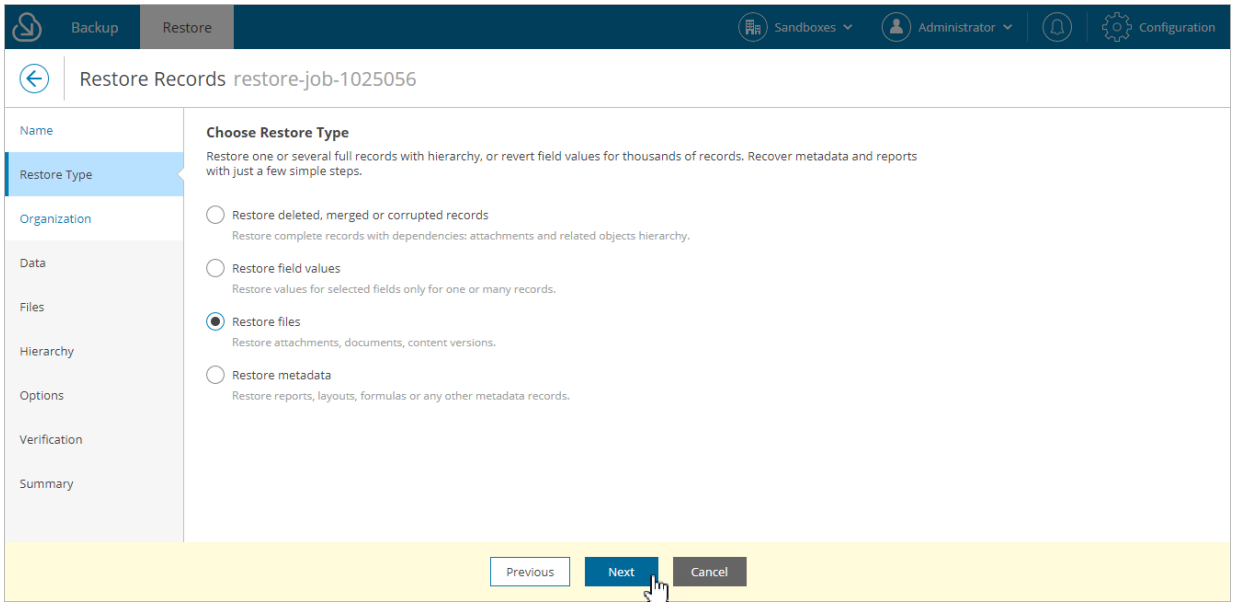
Step 2. Specify Restore Job Info

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.



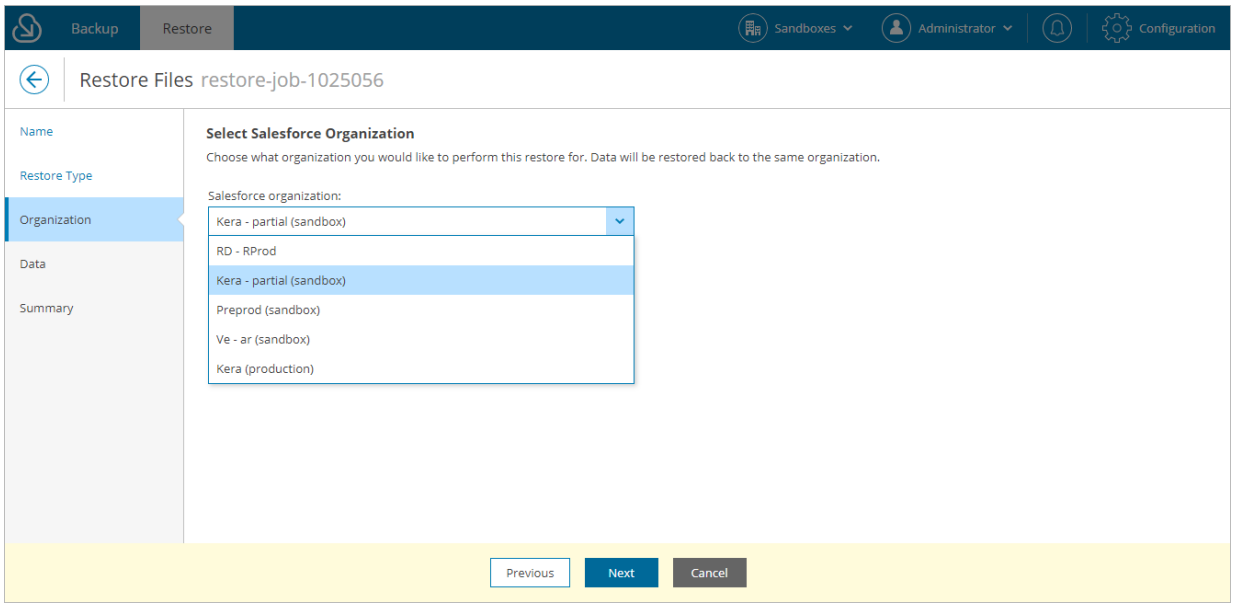
Step 3. Choose Restore Type

At the **Restore Type** step of the wizard, select **Restore files**.



Step 4. Select Organization

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



Step 5. 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. In the **File name** field, you can specify a search pattern for the files. Veeam Backup for Salesforce will search for those files whose names match the specified pattern.

   b. From the Search in drop-down list, select a type of the restored files. If you want restore files of different types in one restore session, you can select *Everywhere*.

      If you select the *Attachment or Content* type of files, you will be able to specify an object with which the files must be associated.

   c. The results will be shown in the table with the columns that match specific Salesforce fields. To choose the displayed information, click the link in the **Display Fields** field and select the necessary Salesforce fields in the **Display Fields** window.

2. Apply additional search conditions using specific filters. To do that, click **Add Condition** in the **Data filters** section, and 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*, *equals*, *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.

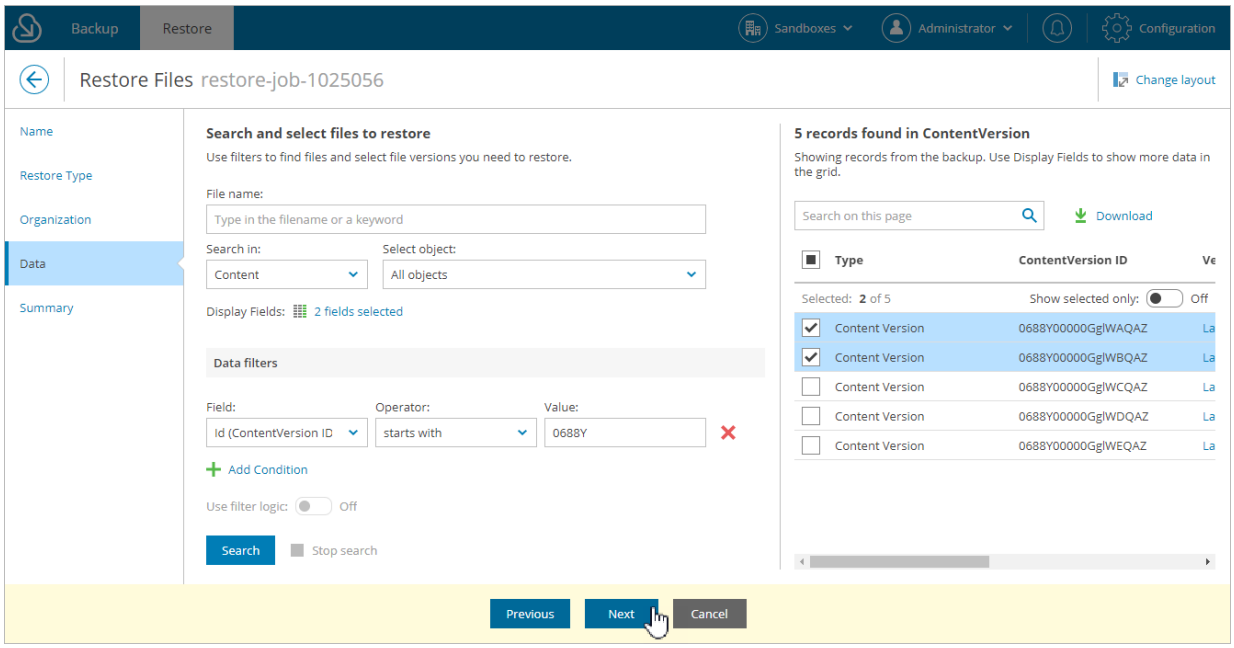
2. Click **Search**.

4. In the **Records** section, Veeam Backup for Salesforce will show the results satisfying your search parameters. Select the files from the search results. 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, then compare record versions 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 selected versions, set the **Compare changes** toggle to *On*.

TIP

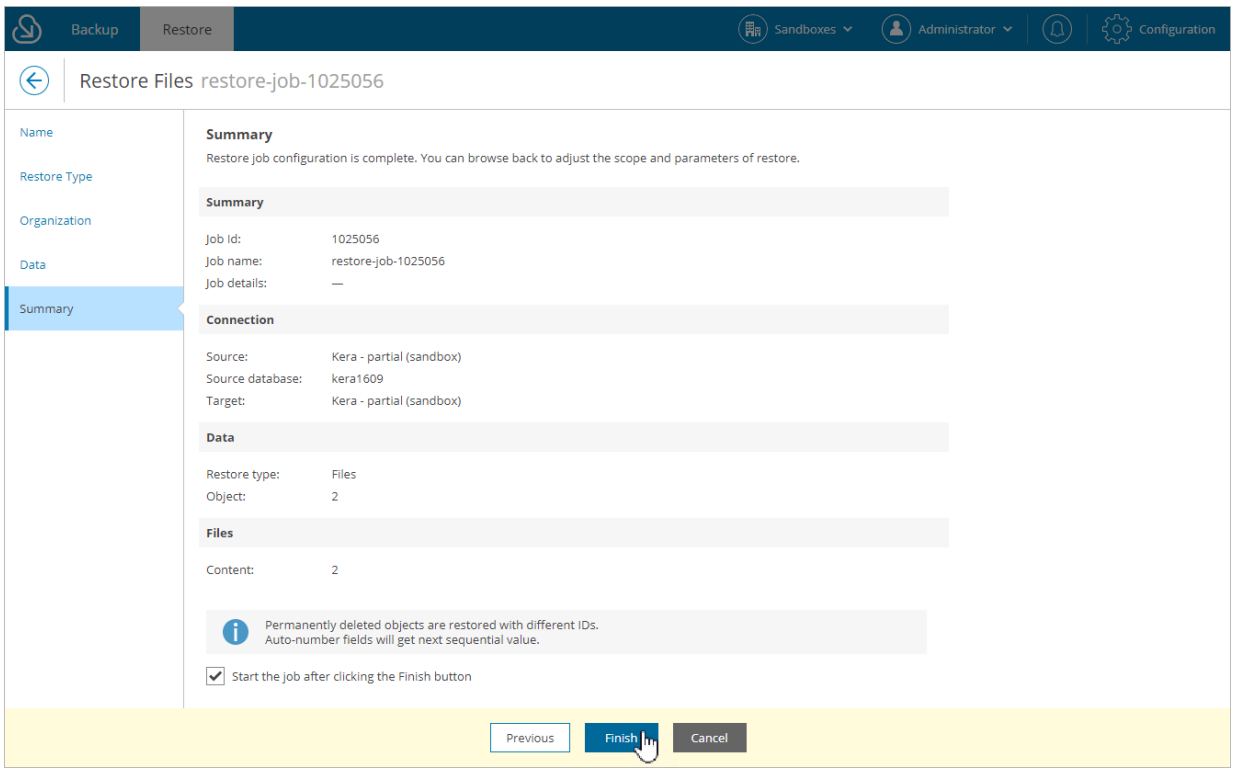
You can download up to 10 files to the local machine. To do that, select the necessary items, and click **Download**.



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.



Restoring Metadata

Metadata restore jobs allow you to recover metadata of the deleted objects. 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 5 of the restore job configuration wizard.

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

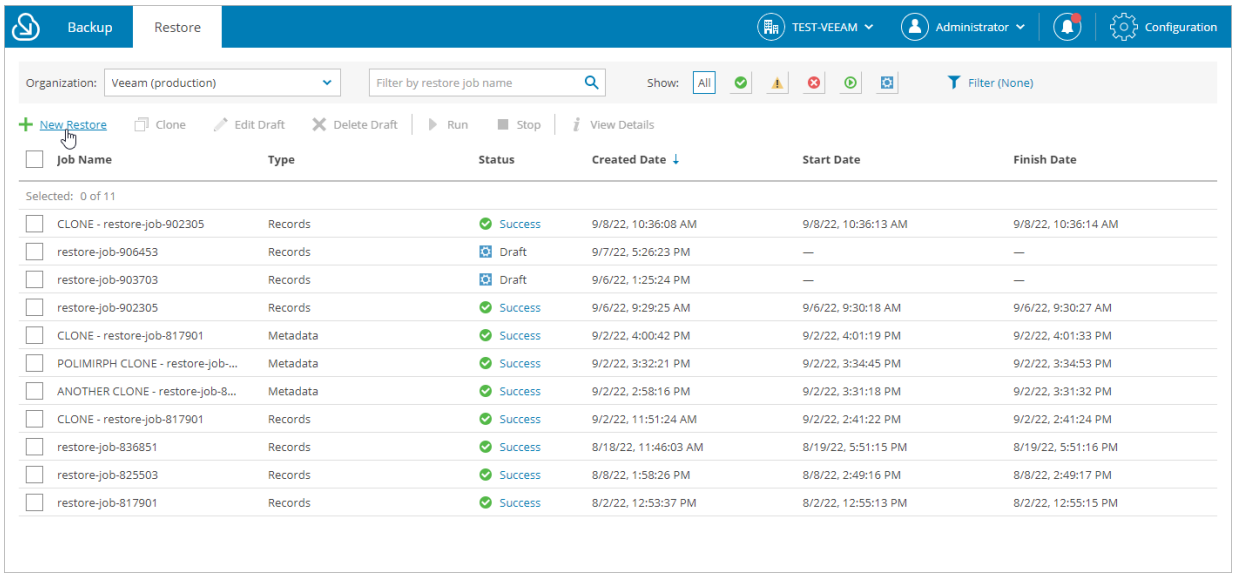
1. Launch the restore job configuration wizard.
2. Specify a name and description for the restore job.
3. Choose the restore type.
4. Select a Salesforce organization.
5. Select objects whose metadata will be restored.
6. Review the restore list.
7. Finish working with the wizard.

Step 1. Launch Restore Job Configuration Wizard

To launch the restore job configuration wizard:

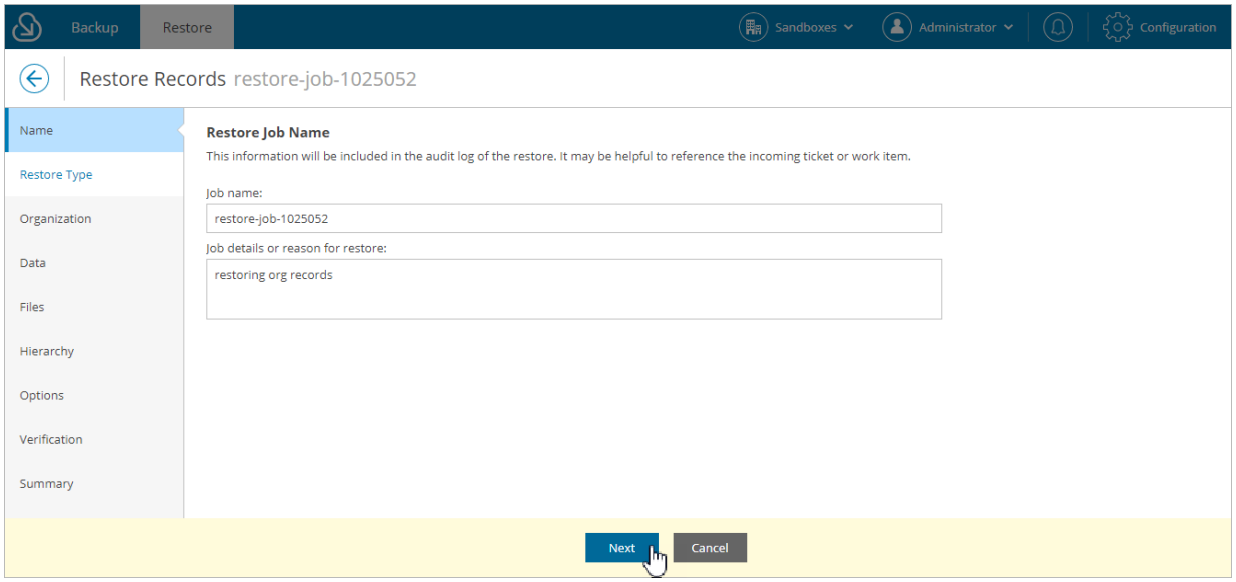
1. Navigate to the **Restore** tab.
2. Click **New Restore**.

> **NOTE**
>
> If you have added multiple companies to Veeam Backup for Salesforce, before you launch the restore job configuration 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 Adding Companies, and the user must have permissions to access the company. For more information on user permissions, see User Roles and Permissions.



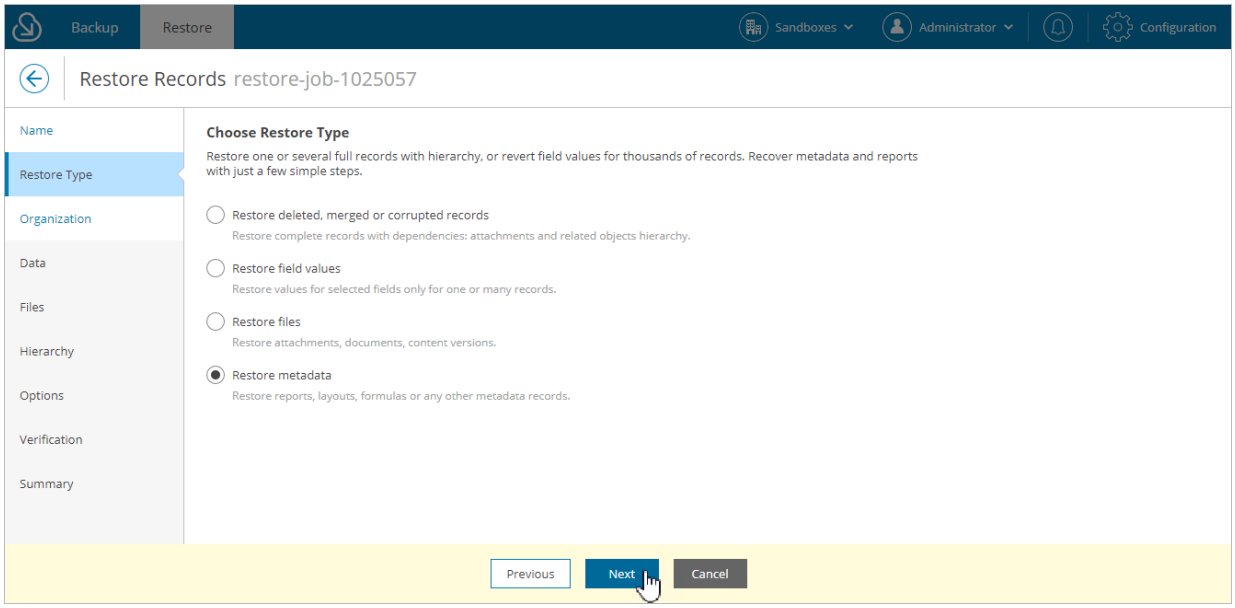
Step 2. Specify Restore Job Info

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.



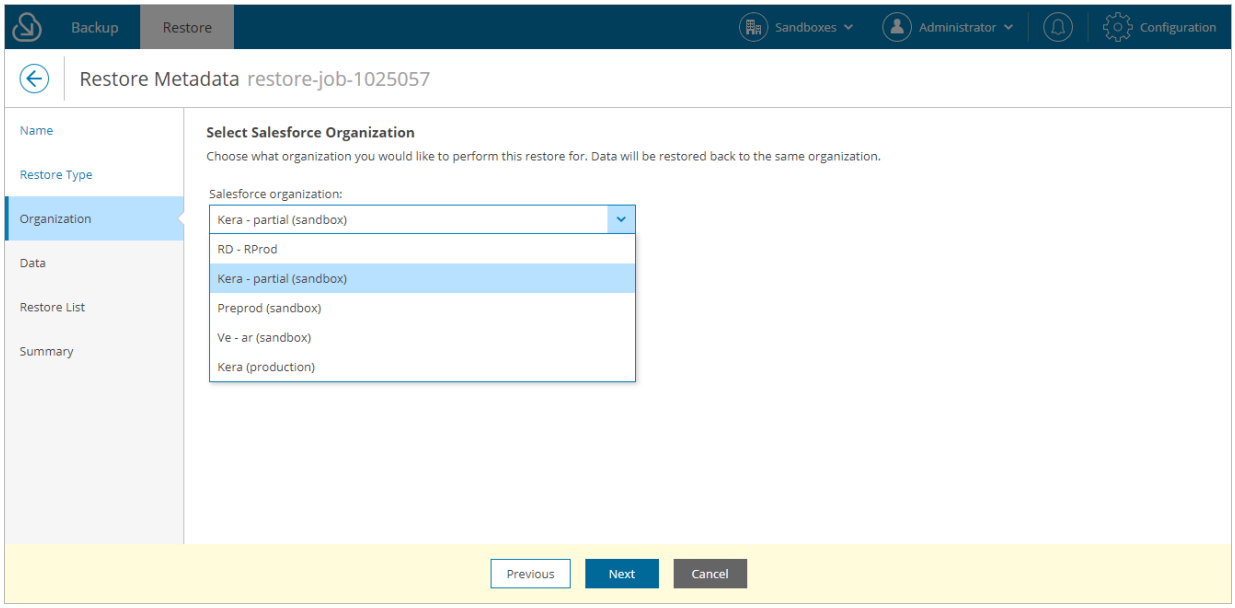
Step 3. Choose Restore Type

At the **Restore Type** step of the wizard, select **Restore metadata**.



Step 4. Select Organization

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



Step 5. 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 at have been backed up are displayed at this step.

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 **Add Condition** and 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*, *equals*, *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**.
3. In the **Objects found** section, Veeam Backup for Salesforce will show the results satisfying your search parameters. Choose the files from the search results:

   a. Select check boxes next to the metadata files that you want to restore.

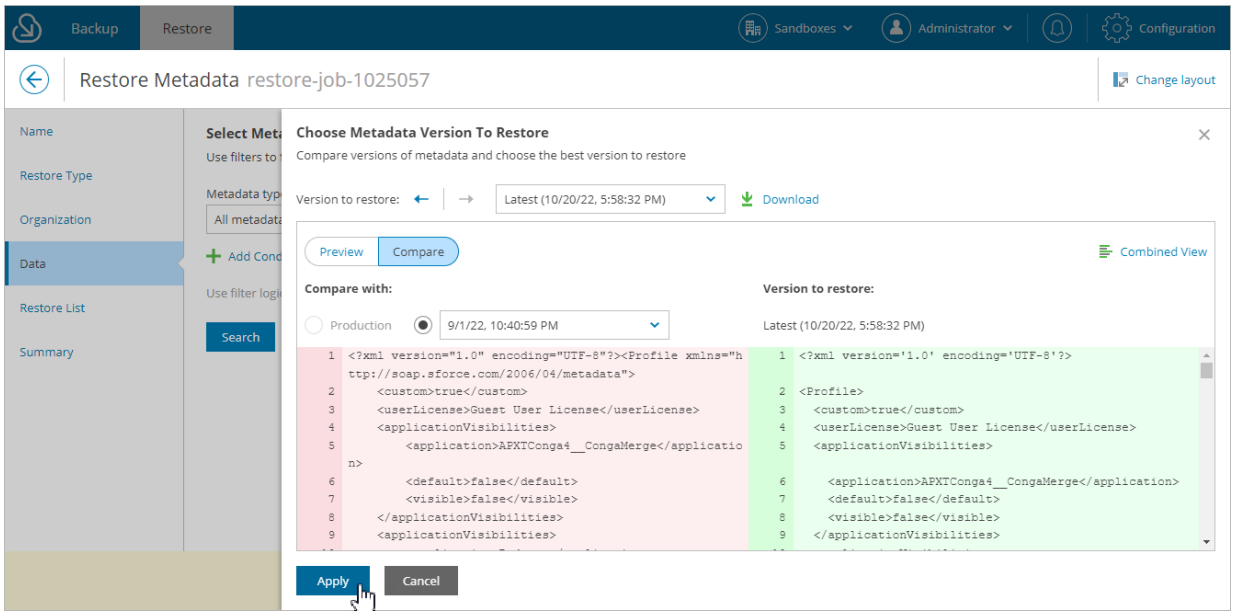
   b. To choose the version of a metadata file that will be restored, click the link in the **Version** column, and in the **Choose Metadata Version to Restore** window, compare file versions and select the necessary version.

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

   c. To add the objects to the metadata restore package, click **Add to Restore List**. From the list, Veeam Backup for Salesforce will create the *package.xml* manifest that will be uploaded to the Salesforce Metadata API.

TIP

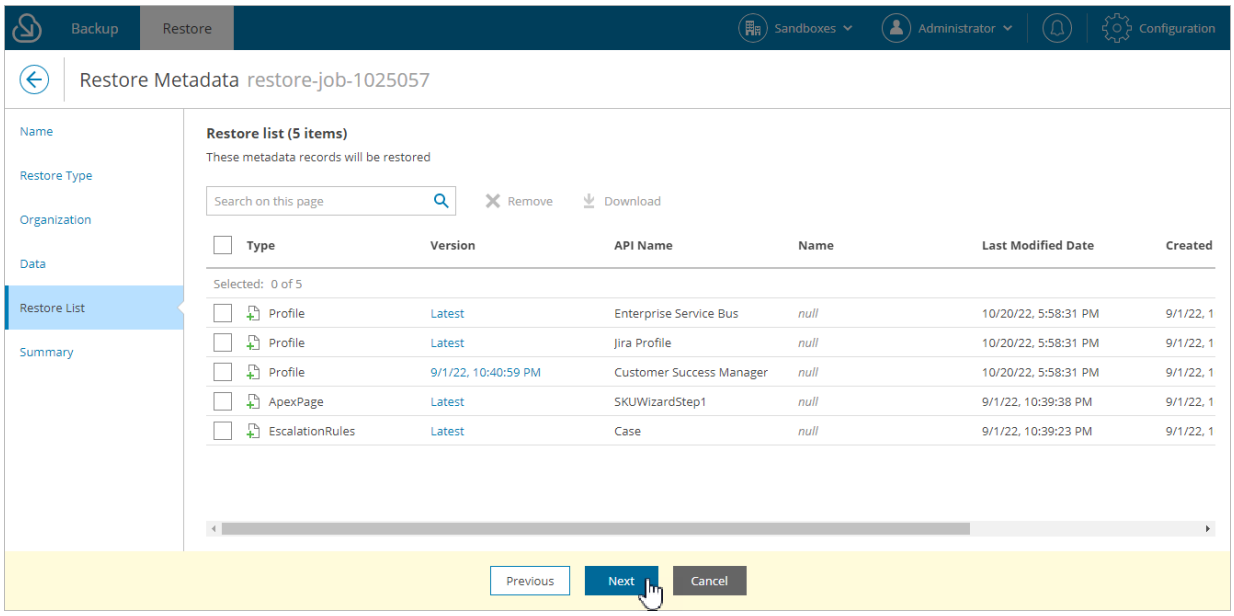
You can download up to 10 metadata files to the local machine. To do that, select the necessary objects, and click **Download**.



Step 6. 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 10 metadata files to the local machine. To do that, select the necessary objects and click **Download**.

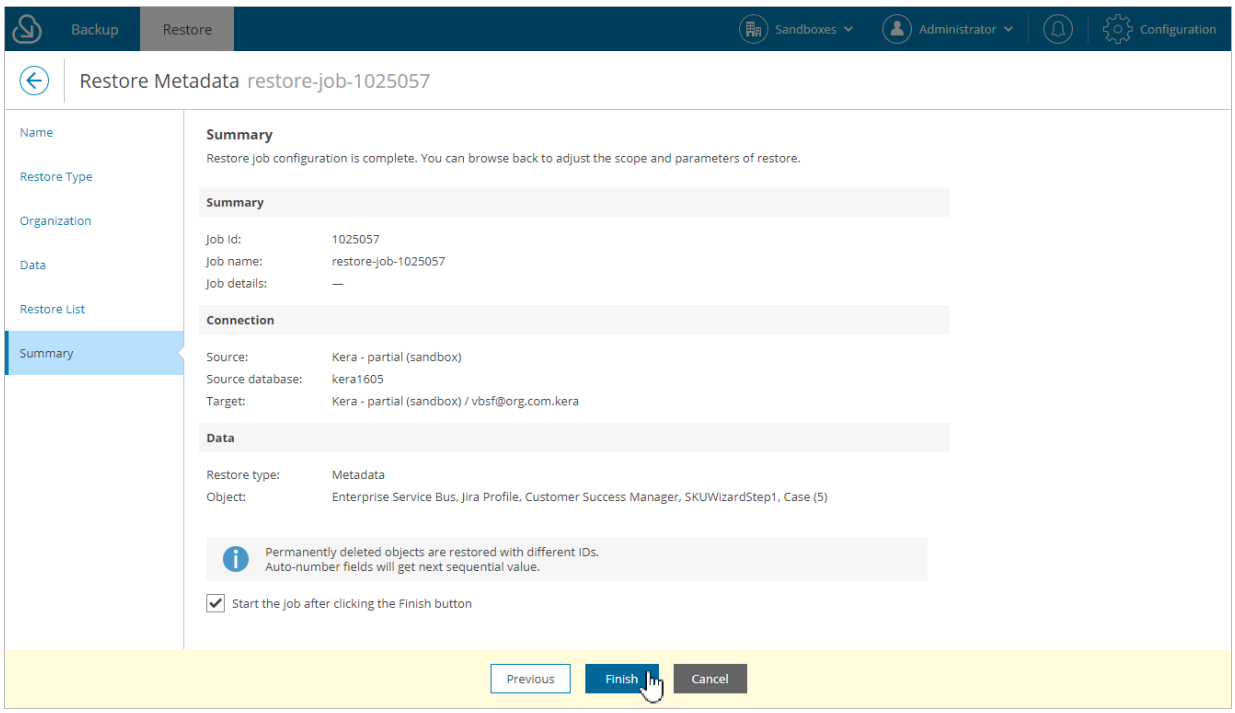


Step 7. Finish Working with Wizard

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.

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.



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:

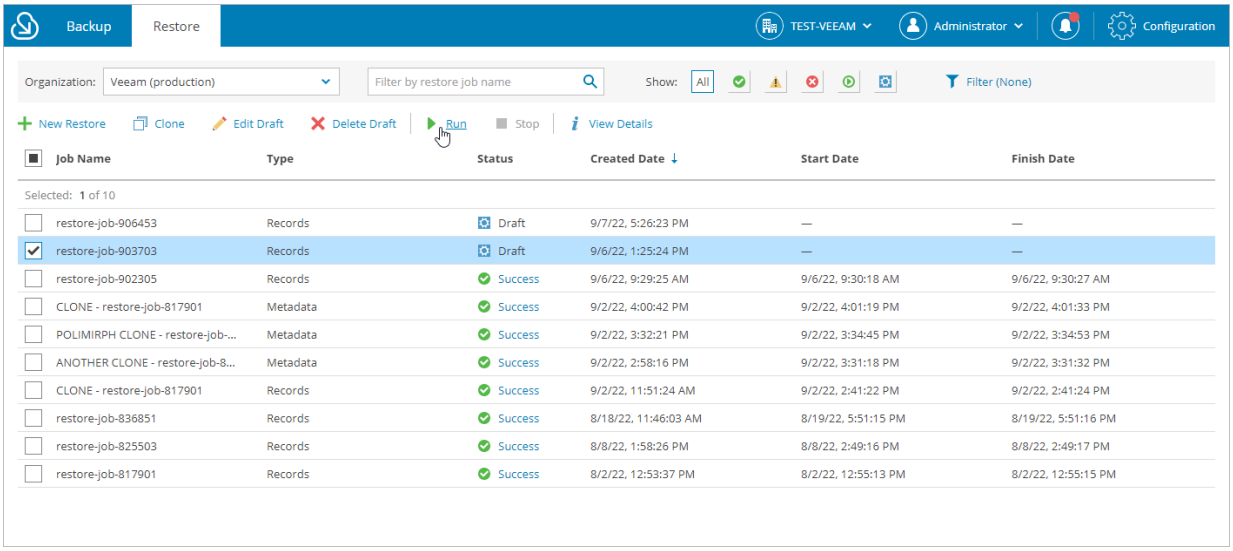
1. Navigate to the **Restore** tab.
2. From the **Organization** drop-down list, select a Salesforce organization for which the restore job has been created.
3. Select the necessary job.

> **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 to do that, as it may result in data inconsistency. Consider that you cannot further edit, start or remove the stopped job.



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.

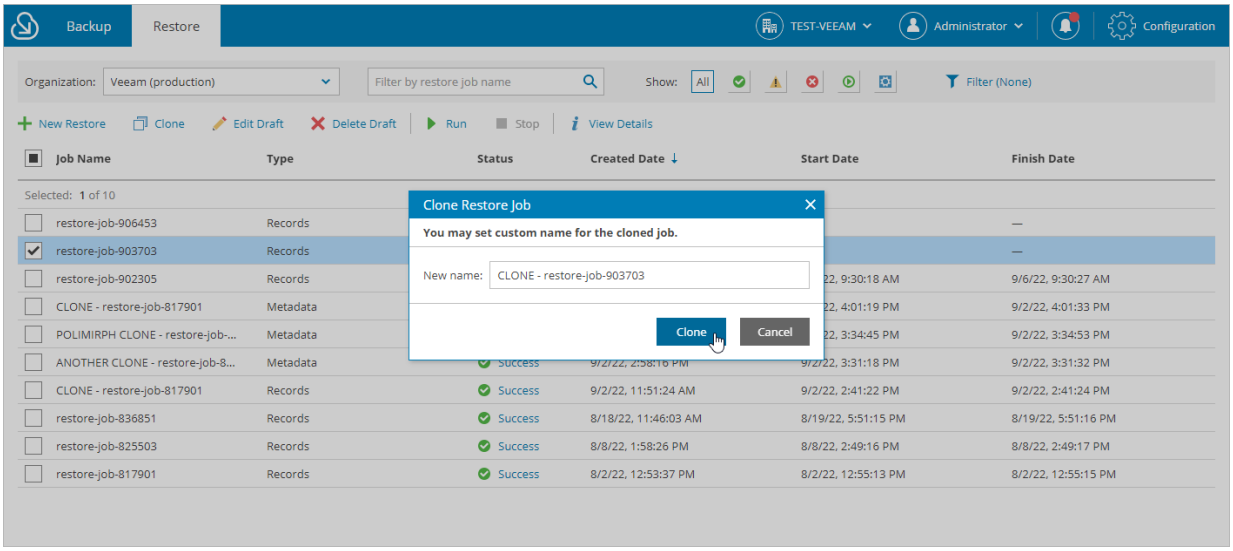
To clone a restore job:

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.



Editing Restore Jobs

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

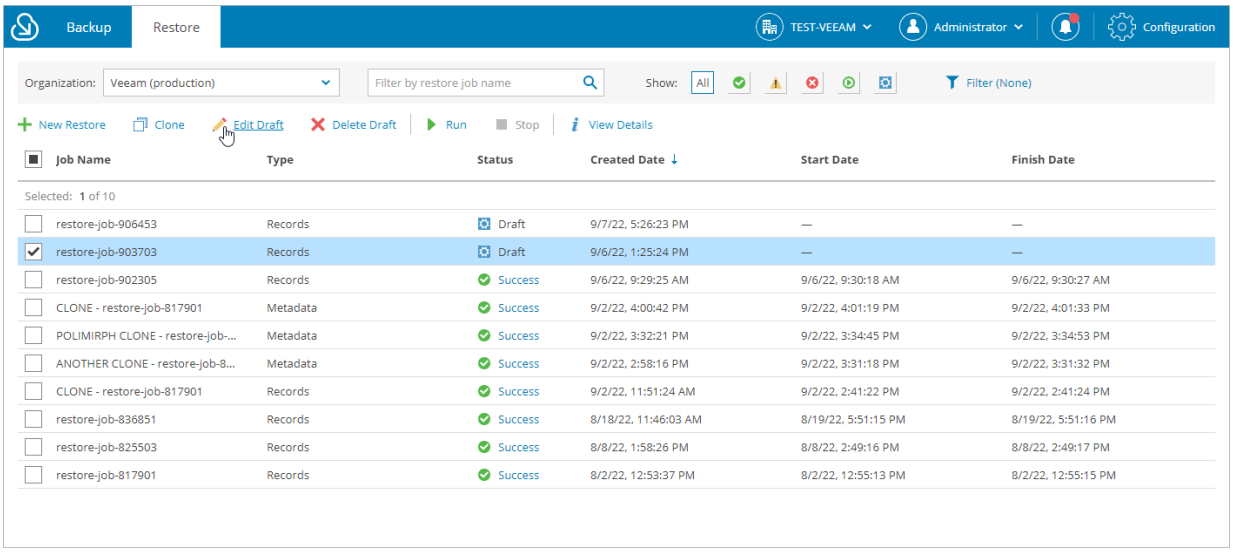
To edit restore job settings, do the following:

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.



Removing Restore Job Drafts

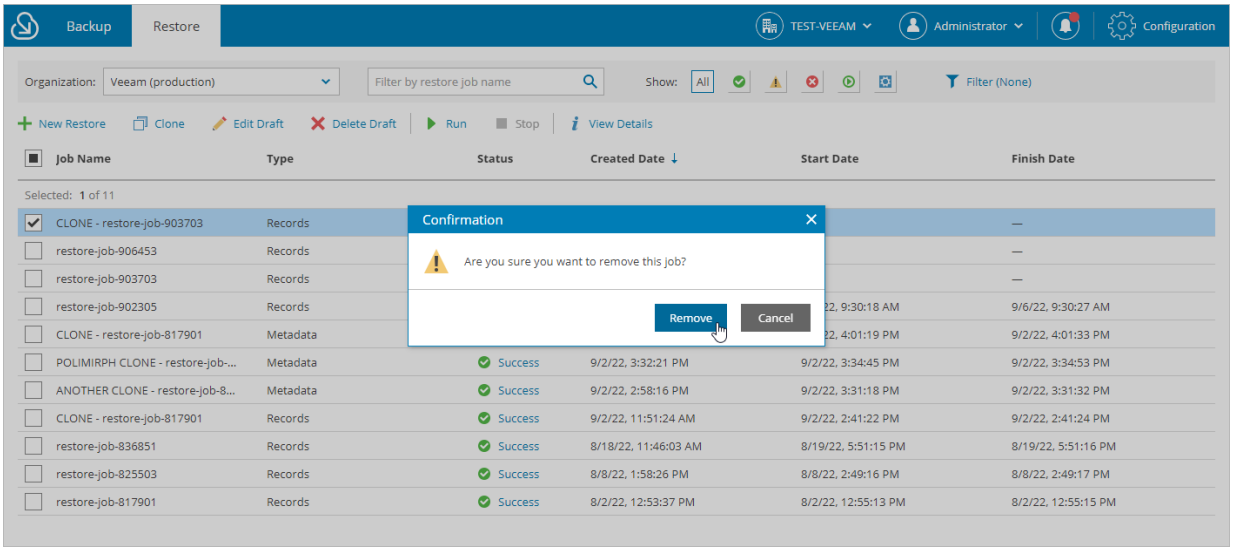
You can manually remove a draft of a restore job that is no longer needed. However, you cannot remove restore jobs that have been already launched.

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.



Viewing Restore Job Details

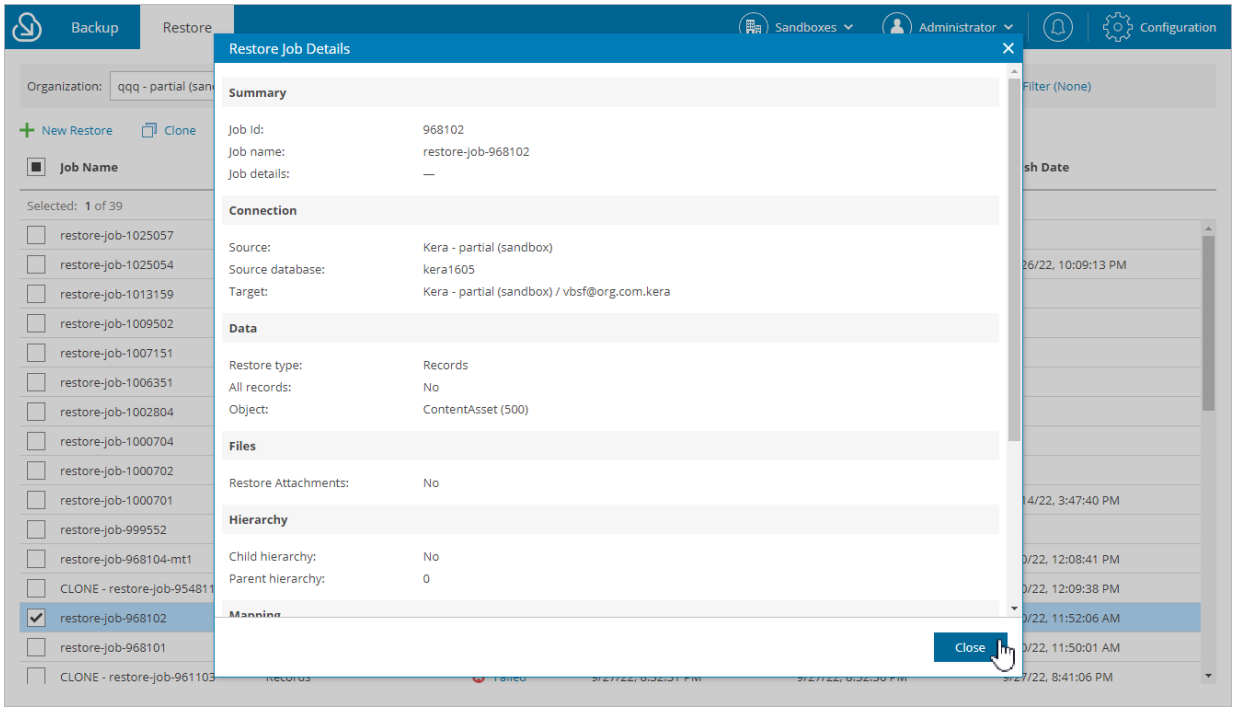
Veeam Backup for Salesforce displays all restore jobs and restore job drafts on the **Restore** tab. After you run a restore job, it cannot be edited or removed anymore. Users can only view the job details and restore session statistics. Users assigned any role can see information on restore jobs created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

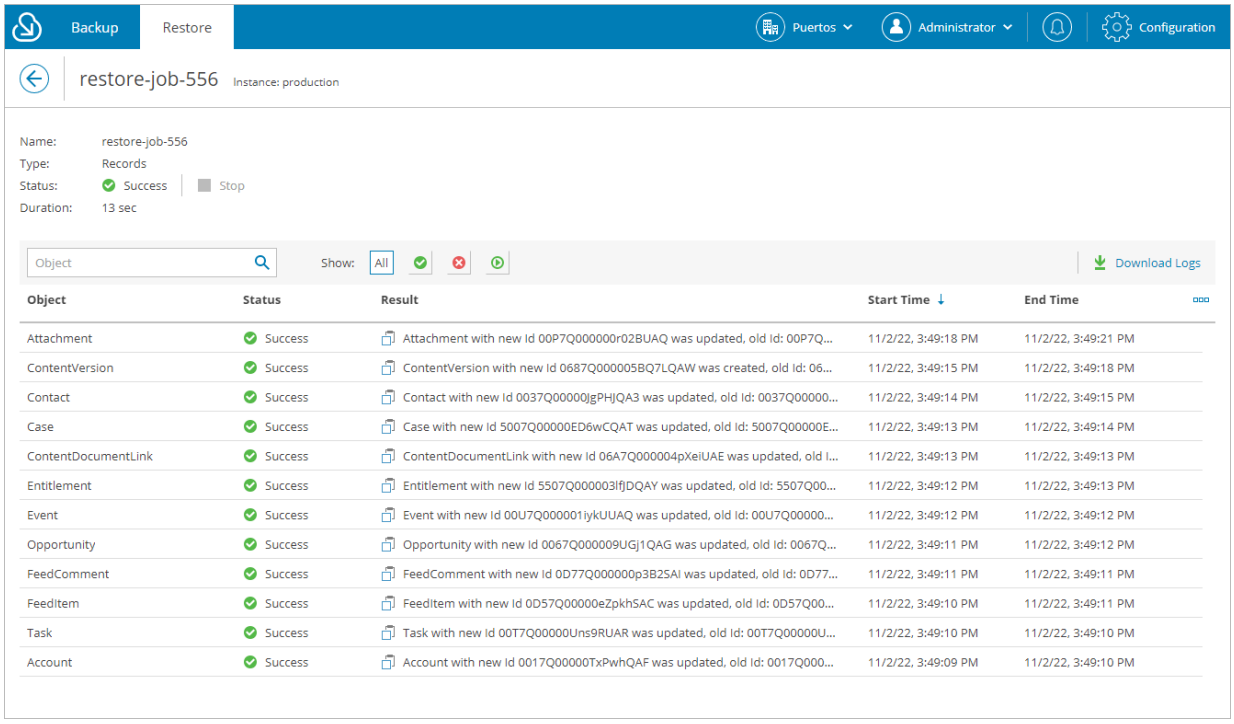


Viewing Restore Sessions

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 created or changed 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.

For more information on result display limits, see Configuring Advanced Settings.



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.

> **IMPORTANT**
>
> You cannot update Veeam Backup for Salesforce Beta version. To learn how to install Veeam Backup for Salesforce v1, see Deployment.

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 service version** – the currently installed version of the Veeam restore service.
   - **Backup service 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

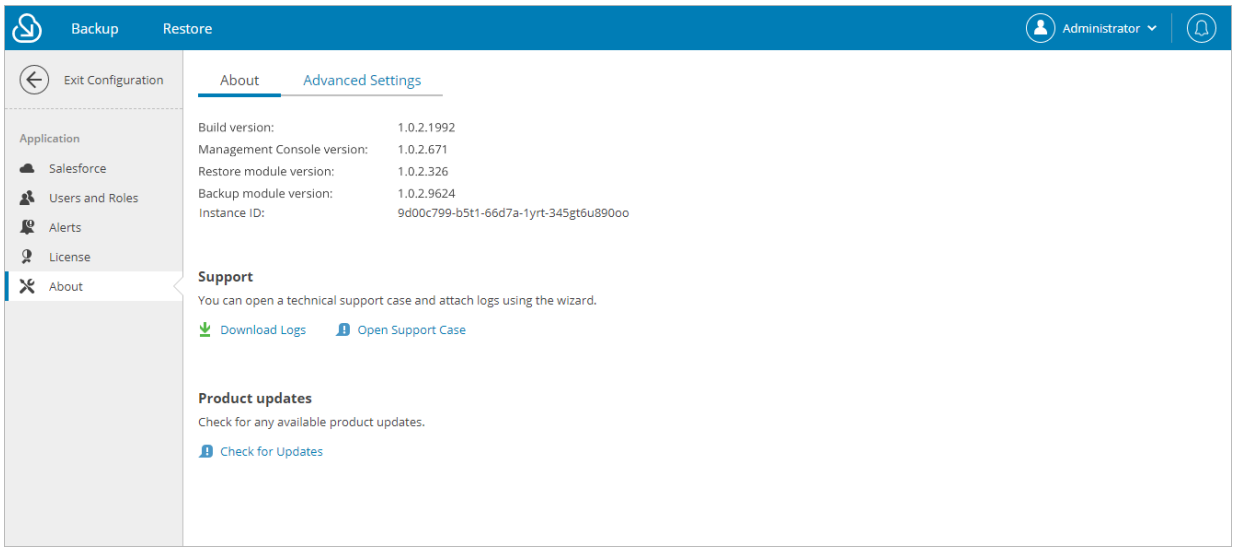
- Checking for Updates
- Installing Updates
- Viewing Updates History

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, Veeam Backup for Salesforce will display them on the **Updates** tab of the **Veeam Backup for Salesforce Updater** page. To view detailed information on an update, select the check box next to the update and click **What's new?**



Installing Updates

To download and install new product versions and available package updates using the Veeam updater service. 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 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 Backup for Salesforce Updater** page:
   a. Switch to the **Configuration** page.
   b. Navigate to **About**.
   c. In the **Product updates** section, click **Check for Updates**.
2. On the **Veeam Backup for Salesforce 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 Backup for Salesforce 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**.

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 Backup for Salesforce Updater** page, switch to the **History** tab.

For each date when an update was installed, **Veeam Backup for Salesforce 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.

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:

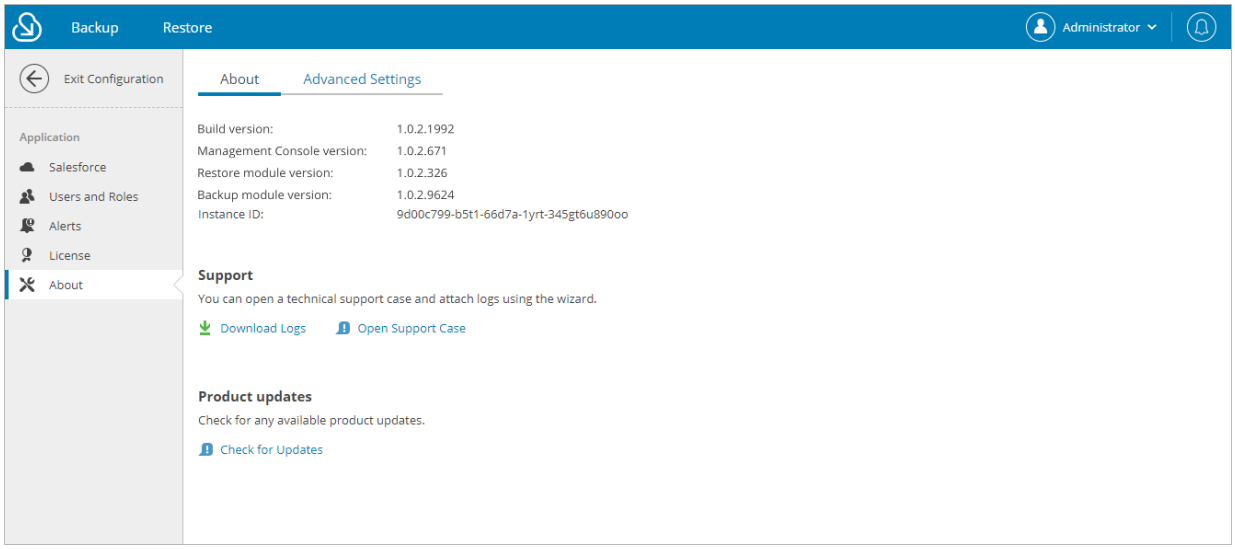
- Version information for the product and its infrastructure components
- The error message or an accurate description of the problem you are facing
- Log files

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.



Downloading Product Logs

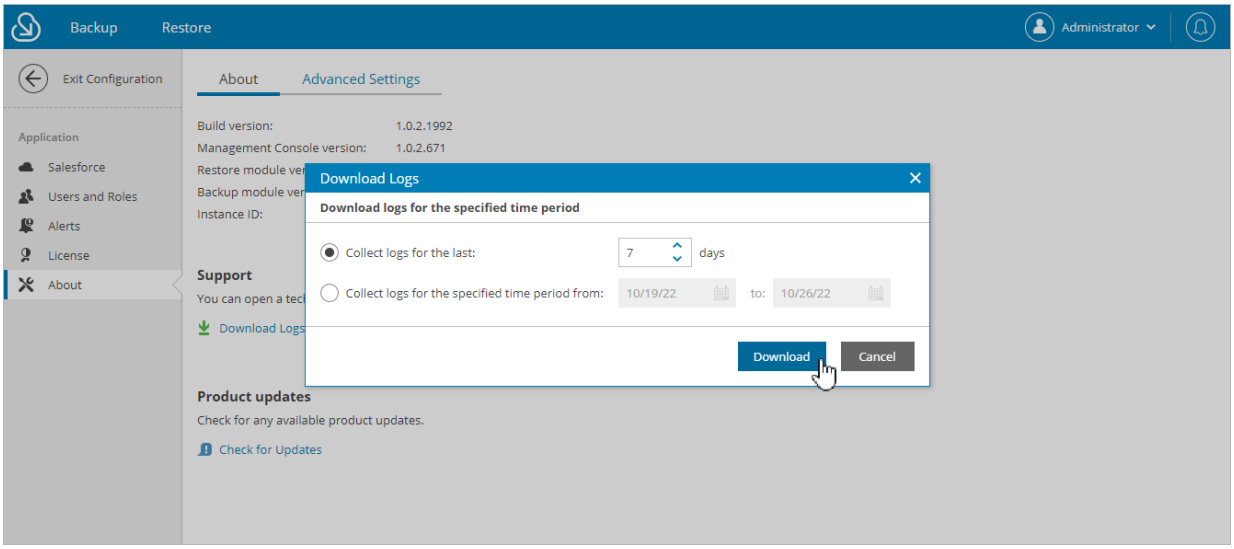
To download the product logs, do the following:

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.



Appendix A. Unsupported Objects

Veeam Backup for Salesforce v1 supports backup of objects available in API version 55 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
- ApexEmailNotification
- ApexPageInfo
- ApexTestQueueItem
- ApexTestResult
- ApexTestResultLimits
- ApexTestRunResult
- ApexTestSuite
- AppTabMember
- AssetAttribute
- AuraDefinitionInfo
- BackgroundOperationResult

- BotAnalytics
- BotEventLog
- BulkApiResultEventStore
- CleanDataService
- CollaborationGroupRecord
- ColorDefinition
- ContentFolderItem
- ContentFolderMember
- ContentHubItem
- DatacloudAddress
- DatacloudCompany
- DatacloudContact
- DatacloudDandBCompany
- DatacloudSocialHandle
- DataStatistics
- DataType
- DcSocialProfile
- DcSocialProfileHandle
- EmbeddedServiceLabel
- EngagementHistory
- EntityDefinition
- EntityParticle
- FeedAttachment
- 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