

User Guide

CloudAlly Salesforce User Guide



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Preface

Welcome

About this Guide

Thanks for selecting CloudAlly Backup for Salesforce. CloudAlly ensure that your organization's data is well protected and always available for swift restore to keep your business operational and your employees productive. We empower end users to correct their own mistakes, and give application administrators, IT leadership and audit teams the confidence and proof that your data is appropriately backed up, safe and ready for recovery. CloudAlly strives to build real relationships with our customers and deliver exceptional service.

We hope this User Guide will help your organization to utilize cloud advancements, aimed at preventing critical business data loss. Our mission is to develop & support advanced software, and to provide better service to our customers. If you ever have a question or need additional help, please contact us at support@cloudally.com or search our Knowledge Base at <https://support.cloudally.com>.

Audience

This guide is intended for individuals who administer CloudAlly Backup for Salesforce.

What's in this Guide

This guide is organized to help you find the information you need to manage CloudAlly Backup for Salesforce. It is divided into functional parts intended to support you as you manage your environment.

Configuration

Prerequisites

To administer the CloudAlly Backup for Salesforce environment, the following are required:

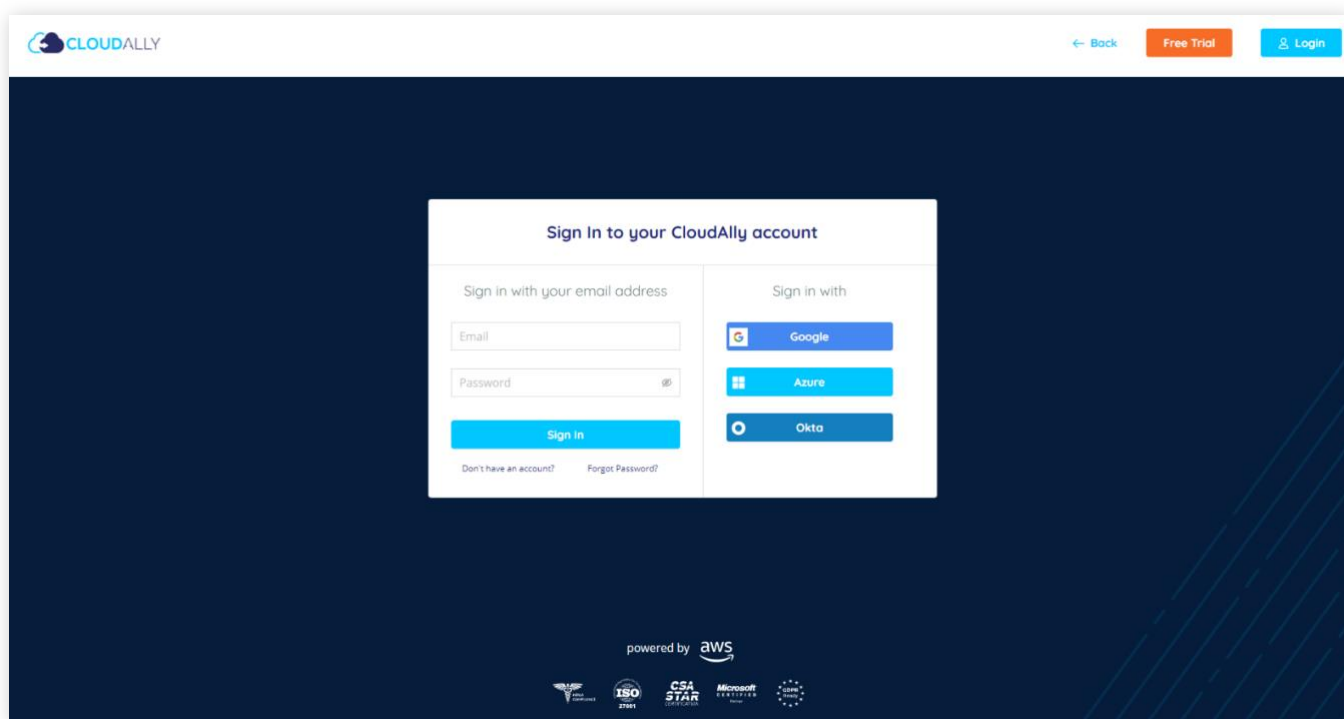
- Salesforce Subscription. Please note that not all editions of Salesforce support API access required for CloudAlly backup to operate. The following editions support the API access: Enterprise Edition, Unlimited Edition, Developer Edition, Performance Edition.
- Salesforce account with API access enabled in the profile. Please refer to the [Salesforce docs](#) for more information.

Create and Access Your CloudAlly™ Account

Sign Up/Sign In from the CloudAlly Home Page

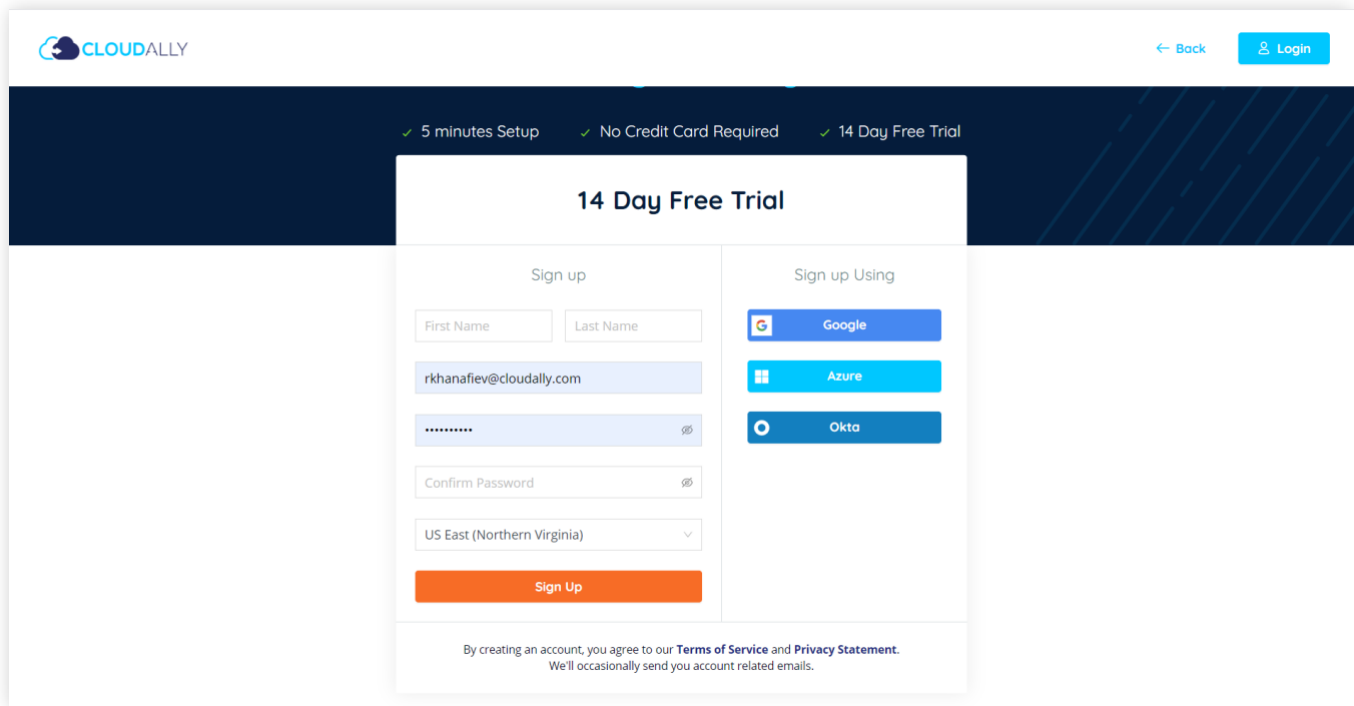
In your Internet browser open www.cloudally.com and click **Log In** link.

The *Sign In* page is displayed.



1. Click **Don't have an account** link.

The *Sign Up* page is displayed.



2. Populate the form and click the **SIGN UP** button.

Note: In addition to the primary AWS data centers available in the dropdown menu "Location", we also offer a "Bring Your Own Storage" (BYOS) option on request. This allows you to store backups in your own AWS S3 buckets, S3 compatible storage service, Azure or Google Cloud Platform. Please contact support@cloudally.com for more information.

Your account is created and an email containing your activation link is sent to your email address. Click on the activation link contained in the email you receive, to activate your account. If you sign up with Google, Azure, Okta the activation link will not be sent to you.

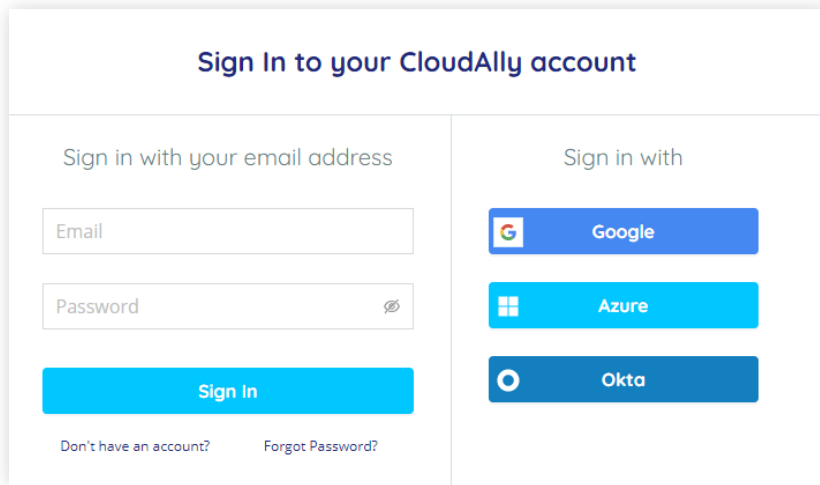
Once your account is activated, you are redirected to the CloudAlly login page. Enter your email address/password and click the **SIGN IN** button to login and access your CloudAlly account.

You can also enable Two-factor authentication to provide additional security. For more information, see the [Two-Factor Authentication](#) section.

Reset your password

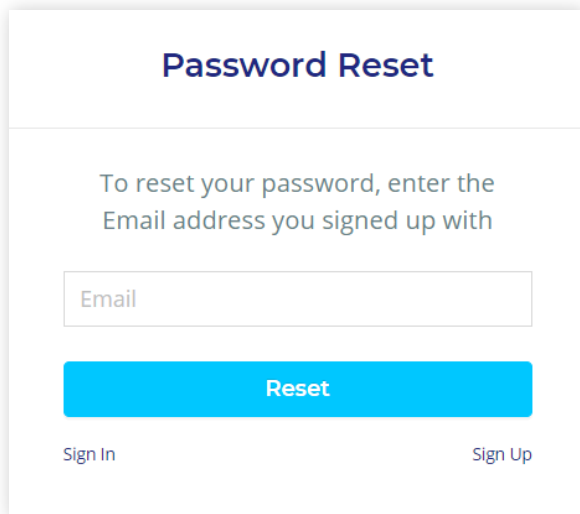
If you do not remember your password, you can easily reset it by the Password Reset function.

1. Click the link **Forgot Password?** to start the process of your password reset.



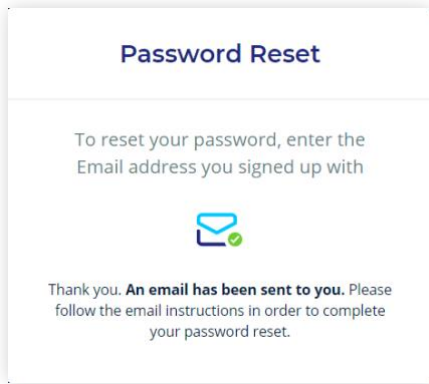
The image shows a sign-in form titled "Sign In to your CloudAlly account". It is divided into two columns. The left column is for email sign-in, with fields for "Email" and "Password" (with an eye icon for visibility), a "Sign In" button, and links for "Don't have an account?" and "Forgot Password?". The right column is for social sign-in, with the heading "Sign in with" and three buttons: "Google", "Azure", and "Okta".

The Password Reset page will appear



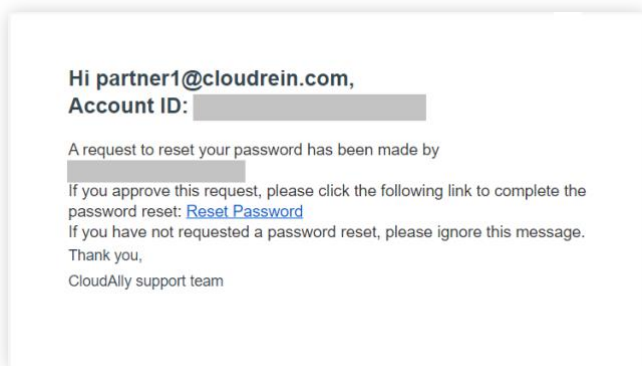
The image shows a "Password Reset" form. It has a heading "Password Reset" and a sub-heading "To reset your password, enter the Email address you signed up with". Below this is an "Email" input field, a "Reset" button, and two links at the bottom: "Sign In" and "Sign Up".

2. In the Email field enter the email address that you have used to sign up.
3. Click the button **Reset** and the window Password Reset will appear.
If you don't want to reset your password, you can create a new account. Click Sign Up for creating a new account.

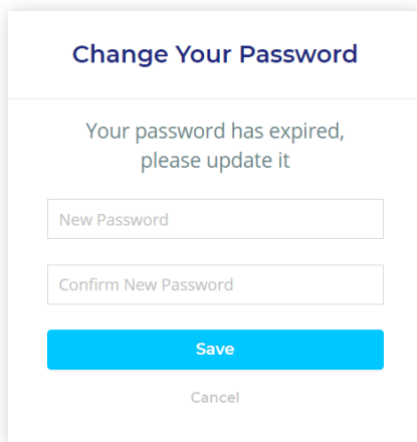


An email will be sent to you. Check your email inbox, follow the email instructions and complete your password reset.

The *email instruction* is displayed.



4. Click the **Reset Password** link to confirm the password reset and the window *Change Your Password* will appear.



5. Enter your new password in the fields **New Password** and **Confirm New Password** and Click the button **Save**. The button **Cancel** is not available.

After reset the password you go back the window *Sign In to your CloudAlly account*.

Salesforce Backup Task Settings

For many businesses, Salesforce data serves as the infrastructure for success. In order to protect your business' critical data, a system administrator must perform time-consuming, manual on-site backups that can only be completed once a week. Whether it be a result of accidental or malicious data deletion, or inadvertent processes that result in data corruption, your business' lack of daily Salesforce data backups represents a tremendous and unnecessary risk! CloudAlly's automated daily Salesforce backup service eliminates this risk and ensures that your data is protected around the clock and available for recovery whenever you need it.

Note: An Admin account is required in order to backup all Salesforce user accounts, including admin accounts.

CloudAlly's Salesforce backup includes all organizational data including chatter feeds and metadata.

Activate New Salesforce Backup Task

Activating a new backup service varies from service to service. This section details the process of creating a new Salesforce backup service.

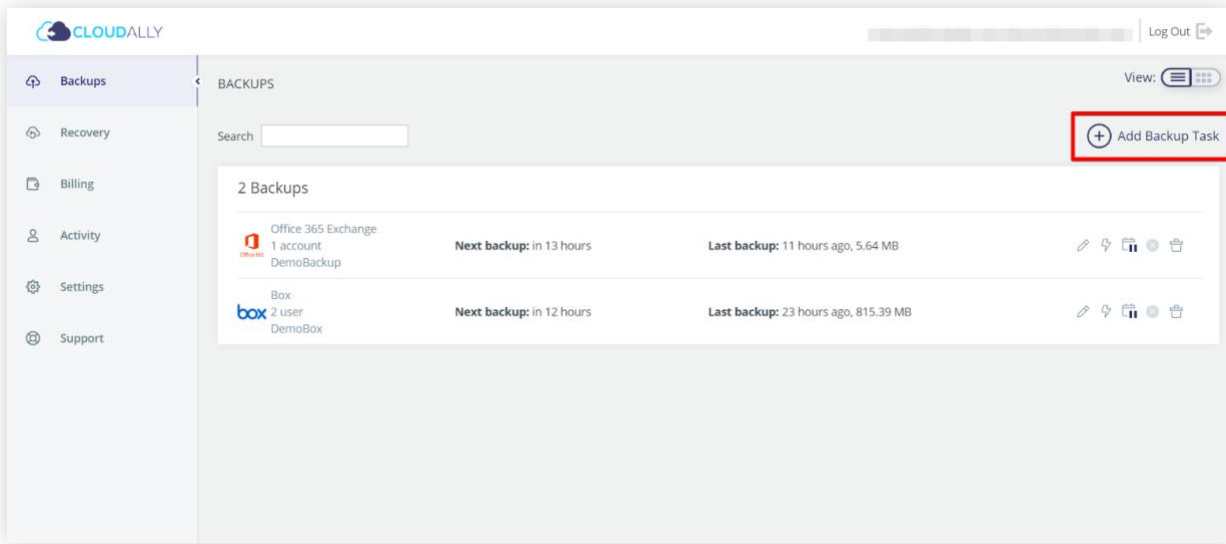
Before CloudAlly can access your Salesforce account, you need to enable API access in your Salesforce user profile by performing the following procedure:

1. Login to your Salesforce account.
2. Click **Setup** at the top of the page.
3. Under Administration Setup expand Manage Users then click **Profiles**.
4. Click **Edit** for the appropriate Profile.
5. Under Administrative Permissions check API Enabled, View All Data, and Modify All Data.

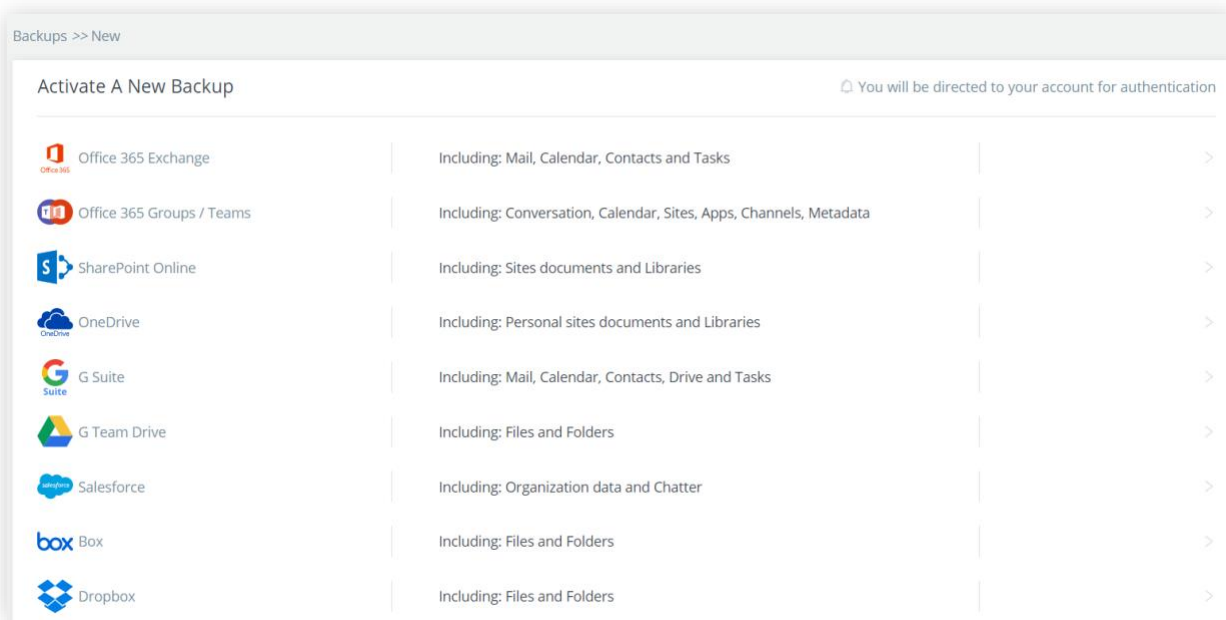
Perform the following procedure in the CloudAlly web application to create a Salesforce backup:

1. Sign in to your CloudAlly account, if you haven't done so yet.

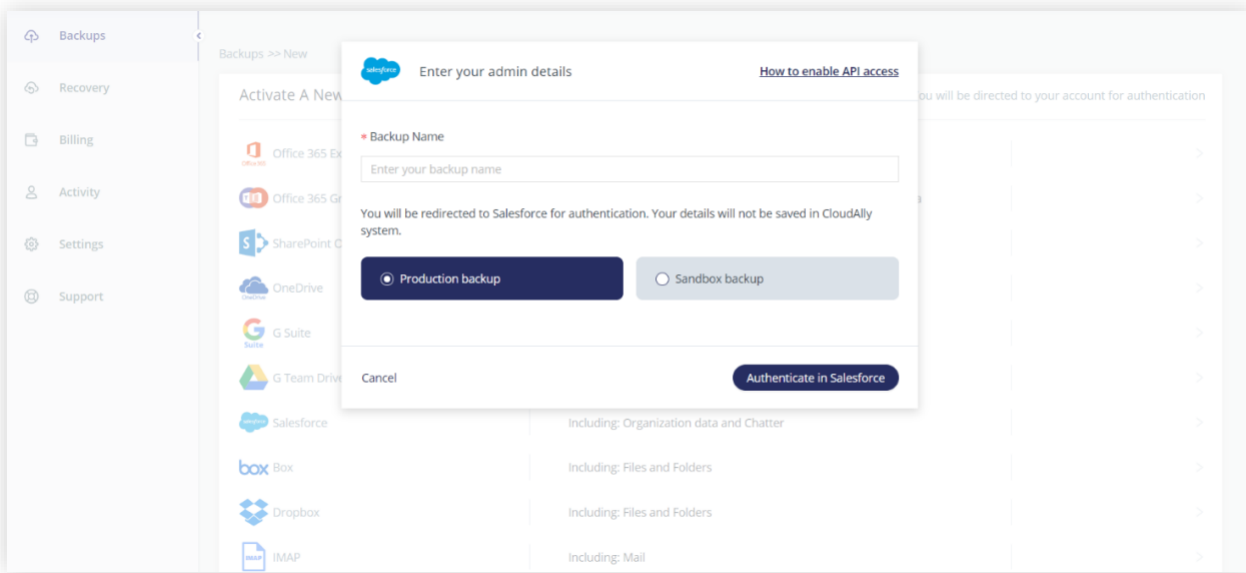
2. Click on **+ Add Backup Task** in the Backups page




The *Activate A New Backup* page is displayed:





3. Click on the **Salesforce** option. The *Salesforce Backup Task Settings* screen appears:







4. Fill-in the name of the backup task. This name is used in the notifications and reports and it can be changed later.
5. Select the radio button adjacent to the required Backup type. Available options are the following: Production backup, Sandbox backup. This option can't be changed later.
6. Click Authenticate in Salesforce button to begin the authorization process. You will be redirected to the Salesforce authorization page. Click the Allow button from the Allow Access page.
7. When prompted, enter your Salesforce Admin credentials from the Salesforce login screen and click Authorize.
8. You will be redirected to the Backup Task page, where you can adjust the settings of the backup.

Test 

Backups >> Test


 **Connected** 


Seats 0



Status  Scheduled Size 0 MB Last Backup Backup actions   


Backup Settings

The automatic addition/deletion of an account, site, domain, table or drive can affect your monthly or annual billing amount



Throughput 



Index all data for Search 

Backup Datacenter  Retention Period 



Backup Frequency Backup Hour (UTC)

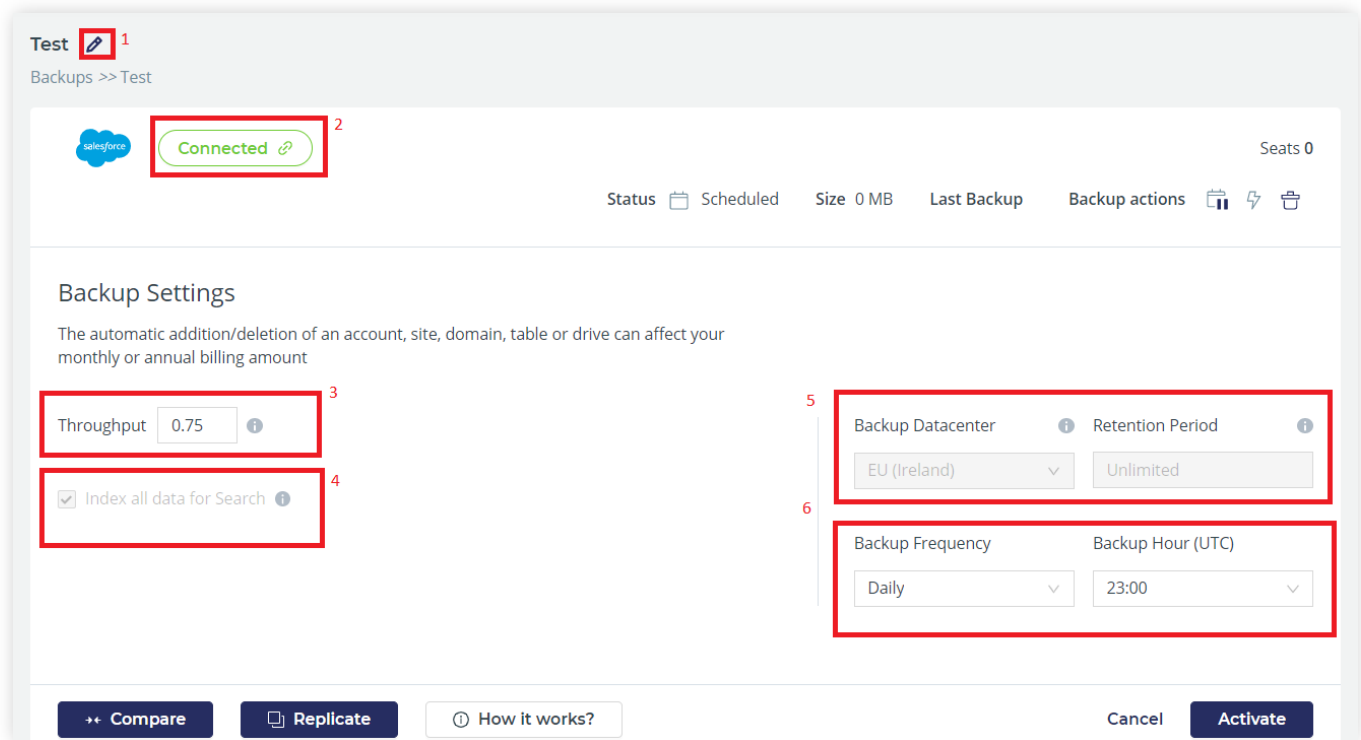
 


Compare  **Replicate**  How it works? Cancel **Activate**

In this page you can adjust the backup settings and activate data and metadata comparison tasks. Please see the sections below for the detailed procedures.

Backup Settings

This set of options enable you to preset the backup options for the selected account.



1. You can change the name of the backup task by clicking the  button next to it.
 2. The indicator found in the top portion of the backup task page displays whether the CloudAlly application was able to connect to the specified Salesforce account. In case the authentication token granted for the CloudAlly application becomes invalid (e.g. it expires due to inactivity, if you put the backup task on pause for a long time), the green **Connected** indicator changes to the red **Disconnected**. In order to grant the application a new token you can click on the indicator to open the authentication dialog and repeat the authentication.
 3. Enter the daily Salesforce API usage limit in the **Throughput** field. The default value is 0.75 and the maximum value is 1.0, which corresponds to the fraction of the total daily API limit (75% and 100% respectively).
 4. In order to provide the granular search and restore functions, the data is unencrypted temporarily to build the search index. Once the index is built, both the data and the index are encrypted. By default, **Index all data for Search** check box is checked and your archives will be indexed for use in the granular search and restore function. If you want to uncheck **the Index all data for Search** you will need to contact support@cloudally.com. This will disable the granular search and restore function but you can still browse backups via date.
- Note:** The CloudAlly application performs indexing process for all items except for attachments.
5. The fields **Backup Datacenter** and **Retention Period** are “display only” and their values can’t be changed here.

The **Backup Datacenter** field displays the Data Center location you have selected during your registration with CloudAlly.

Note: Your backup storage location cannot be changed once it's been set during the account setup process. Please contact support if you need to move backups to a different geographic region, or if you'd like more information on our "Bring Your Own Storage" (BYOS) option.

The **Retention Period** field displays whether a retention period has been set up. By default, we provide unlimited retention of your daily backups for as long as you maintain your account subscription. You can override this default and specify a retention period in days, months or years by submitting a support ticket. Backups older than the retention period specified will be automatically deleted

If you want to change these fields, please contact support@cloudally.com.

6. Click the drop-down list adjacent to **Backup hour (UTC)** field and select the backup hour.
7. Click the drop-down list adjacent to **Backup frequency** field and select the backup frequency. Available options are the following:
 - Daily
 - Every 3 Days
 - Weekly

8. The **Compare** and **Replicate** buttons open menus of the respective Compare and Replicate tools.

You can click the **Compare** button to initiate the data or metadata comparison process. This operation compares data or metadata between two backup snapshots or a backup snapshot and production database. Please see section Compare your data or metadata for detailed instructions.

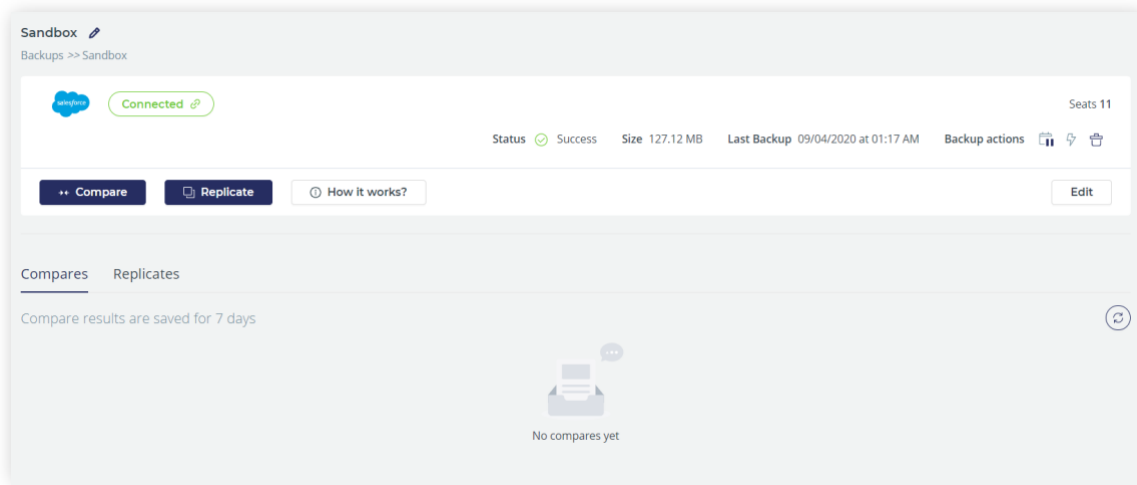
You can click the **Replicate** button to start the data or metadata replication process. This process can help you copy the data or metadata of your organization to the sandbox of your or any other organization. The tool is especially helpful for Seeding purposes. Please see section Replicating your database for detailed instructions.

9. Click the **Save** button to save the backup details.

Manage Your Salesforce Backup

This section explains the process of managing your Salesforce backup tasks.

1. Click the **Backups** element from the Navigation Panel. The Backup Tasks page is displayed.
2. Locate the backup task you want to work with. You can use the search bar in the top section of the page in order to filter the tasks.
3. Clicking the backup task leads you to the task details screen:









This page displays the task summary, provides controls over the task execution and contains data comparison tasks and results.

You can change settings of the task by clicking the **Edit** button.

The task can be paused, started and deleted from this page with the **Backup actions** panel.

Quick Actions on Backup

You can perform the following actions on your Salesforce Backup task, by clicking the corresponding icons in the Backups screen:

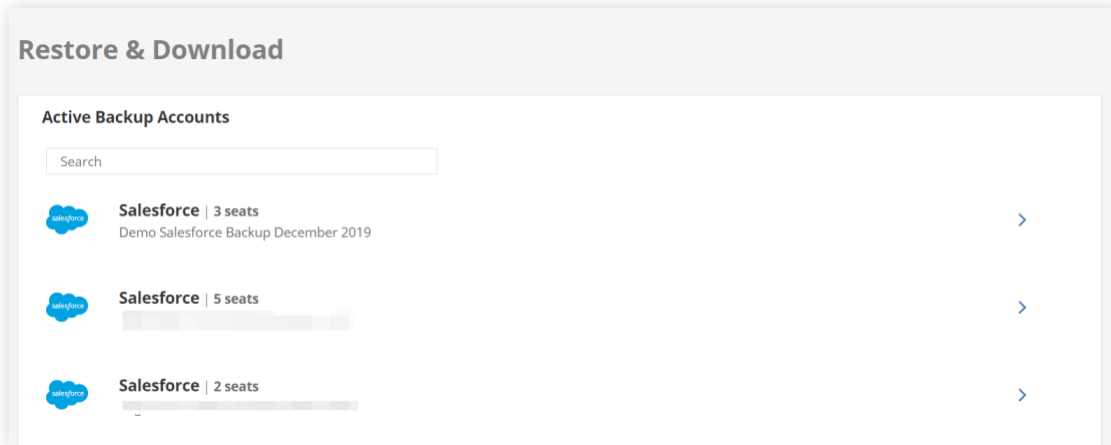
- Click the  icon to edit the backup task details.
- Click the  icon to pause the backup process.
- Click the  icon to start/restart the backup process.
- Click the  icon to run backup immediately.
- Click the  icon to cancel backup process.
- Click the  icon to delete the backup task. Please note that if you delete a backup task, all the associated backup data is removed.

Restore & Download Your Salesforce Data

The Restore & Download option enables you to restore your backed-up data from CloudAlly's archives. You can perform the following procedure to Restore & Download data from your Salesforce backups:

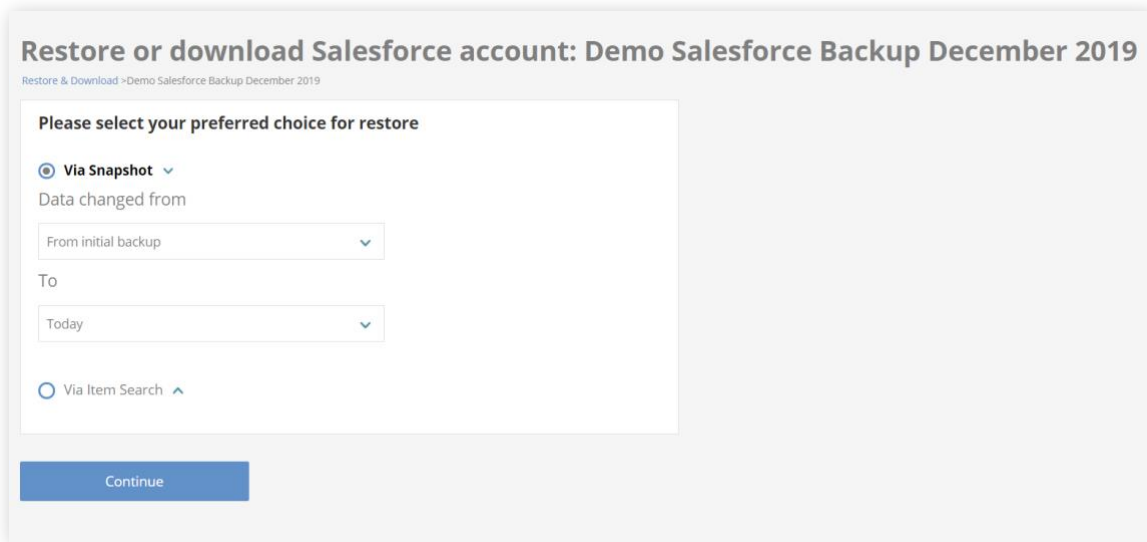
1. Click the **Recovery** element from the Navigation Panel.

The *Restore & Download* page is displayed with all your active backup account details.



2. Click **Salesforce** backup task from which you wish to recover the data.

The Restore or download Salesforce account <backup name> page is displayed.



3. Select your preferred choice for restore by selecting the radio buttons adjacent to the required option. Available options are the following:
 - Via Snapshot
 - Via Item Search

Restore or Download Via Snapshot

1. Click the text fields adjacent to **Data changed from** and **To** fields to select the **From** and **To** dates from the calendar, if you have selected **Via Snapshot** option.

Restore or download Salesforce account: Demo Salesforce Backup December 2019

Restore & Download > Demo Salesforce Backup December 2019

Please select your preferred choice for restore

Via Snapshot ▾

Data changed from

From initial backup ▾

To

Today

Via Item Search

December 2019

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

1. The list of backup snapshots for the selected account is displayed. Select the archive from which you want to restore the data

Restore or download from Demo Salesforce Backup December 2019 archive

Restore & Download > Demo Salesforce Backup December 2019 > snapshots

From the archive list below select the relevant items, then click on "restore" to perform a non-destructive restore directly to the online service, or "download" to create a zip extract of the data.

DATE	ITEM	ACTION
<input type="checkbox"/> Dec 6 2019 10:09 AM	Salesforce	Q
<input type="checkbox"/> Dec 6 2019 09:08 AM	Salesforce	Q
<input type="checkbox"/> Dec 5 2019 05:05 AM	Salesforce	Q
<input type="checkbox"/> Dec 4 2019 02:06 PM	Salesforce	Q
<input type="checkbox"/> Dec 4 2019 01:25 PM	Salesforce	Q

View 1 - 5 of 5

<<< Page 1 of 1 >>>

2. Click the checkbox of the snapshot you want restored. You can restore the entire snapshot by clicking the **Restore** button or download the backup data by clicking the **Download** button at the bottom of the page.

Please confirm the restore request dialog window is displayed

Please confirm the restore request ✕

You are about to restore items from the archive of **agaliev@cloudally.com**

Restore to

Include metadata
 Activate inactive users ?
 Disable triggers in restore ?

Restore mode for identical records: ?

Replace: Restore will overwrite existing live data.
 Bypass: Existing data will be bypassed and not restored.
 Duplicate: Existing data will be duplicated.

Account type:

Production
 Sandbox

*You can restore the data to a different organization.

A confirmation Email will be sent to you upon completion.

- a) Fill-in the account to which the data needs to be restored in the Restore to field.
- b) You can choose three available options for restoring:
 - **Include metadata:** If you want that your Items Include Information about the files, configurations, code, logic and page etc.
 - **Activate inactive users:** If you would like the restore the restore process to automatically attempt to active inactive users in order to restore the associated data using their accounts. The users will be deactivated after the restore process. If the checkbox is left unmarked, the restore will attempt to insert the data as the current user.
 - **Disable triggers in a restore:** Mark this checkbox if you would like the restore process to automatically disable all Validation Rules, Workflows, Triggers and Processes in the restored data. This doesn't affect the triggers in the existing data at the destination organization.
- c) Choose one of the three available restore modes:
 - **Replace:** Restore will overwrite existing live data.
 - **Bypass:** Existing data will be bypassed and not restored.
 - **Duplicate:** Existing data will be duplicated.
- d) Choose available account types:
 - Production
 - Sandbox
- e) Click the **OK** button. The selected backup data will be restored to the specified account. When the recovery process is complete the results summary is sent to your email.

If you click the **Download** button, Please confirm the export request window appears.

Please confirm the export request ✕

You are about to export items from the archive of **agaliev@cloudally.com**

Export in .zip format:

for download ▼

Optionally include:

Export deleted items

Metadata


A notification Email with a download link will be sent to you upon completion.

- a. Click the drop-down list and appear available options for downloading. The available options are representing: for download, to your Amazon, to your Azure Bob, to your Box.com, to your Dropbox, to your AWS S3 compatible, to your GCP storage.

You can choose optionally two options: Export deleted items and Metadata.

- **Export deleted items:** Restoring your deleted Items.
- **Metadate:** If you want that your Items Include Information about the files, configurations, code, logic and page etc.










- b. Click **YES**. The download instructions are sent to your registered email address. The download link is valid only for 72 hours. Exported data is available in a CSV format compatible with Salesforce's Import Wizard and Data Loader.

3. Alternatively, you can click the  button to drill-down into the snapshot and view item level structure of the backup data. There you can select one or more items for recovery.

Restore or download Salesforce from r.khane90@gmail.com archived at Dec 06, 2019

Restore & Download > Demo Salesforce Backup December 2019 > snapshots > Salesforce

From the archive list below select the relevant items, then click on "restore" to perform a non-destructive restore directly to the online service, or "download" to create a zip extract of the data.

<input type="checkbox"/>	Type	Name	Date
<input type="checkbox"/>		Account	
<input type="checkbox"/>		ApexClass	
<input type="checkbox"/>		AppDefinition	
<input type="checkbox"/>		AppMenuItem	
<input type="checkbox"/>		AssignmentRule	
<input type="checkbox"/>		BusinessHours	
<input type="checkbox"/>		Calendar	
<input type="checkbox"/>		Campaign	
<input type="checkbox"/>		CampaignMemberStatus	

4. Once you select a snapshot (if you wish to recover all the data in the backup), or an item/items (if you wish to recover only selected items), the buttons **Restore** and **Download** become available.
 - a. If you click the **Restore** button, the restore confirmation dialog window appears
 - b. If you click the **Download** button, the download confirmation dialog window appears
5. Please follow the instructions found in the section **Confirm the Restore or Download** to complete the process.

Restore or Download Via Item Search

1. Enter the search phrase to search for an item, in your Salesforce account. The search algorithm finds both full and partial matches in names of the backed-up items and in their contents, where applicable.

Restore or download Salesforce account: Demo Salesforce Backup December 2019

Restore & Download > Demo Salesforce Backup December 2019

Please select your preferred choice for restore

Via Snapshot ^

Via Item Search v

Search phrase

Table

Created By ID

Date from

Date to

Is Deleted

For advanced search options you can provide the following details in the drop-down form:

- **Table:** Enter a name of the table, from which the data has to be retrieved.
 - **Created By ID:** Enter a term that matches with the part of the user's ID.
 - **Date from:** Enter the date from the initial backup, from which you want to download the data.
 - **Date to:** Enter a date until which the data need be downloaded.
 - **Is Deleted:** Select the check box adjacent to this field if you want to include deleted items in your search.
2. Click the **Continue** button.

Restore or download Salesforce from [account name] archive

Restore & Download -> r.khane90@gmail.com -> Salesforce

From the archive list below select the relevant items, then click on "restore" to perform a non-destructive restore directly to the online service, or "download" to create a zip extract of the data.

Search phrase

Table Created By ID

Account Enter a term that matches a part of the file name

Date from Date to

From initial backup Today

Is Deleted

SEARCH **CLEAN**

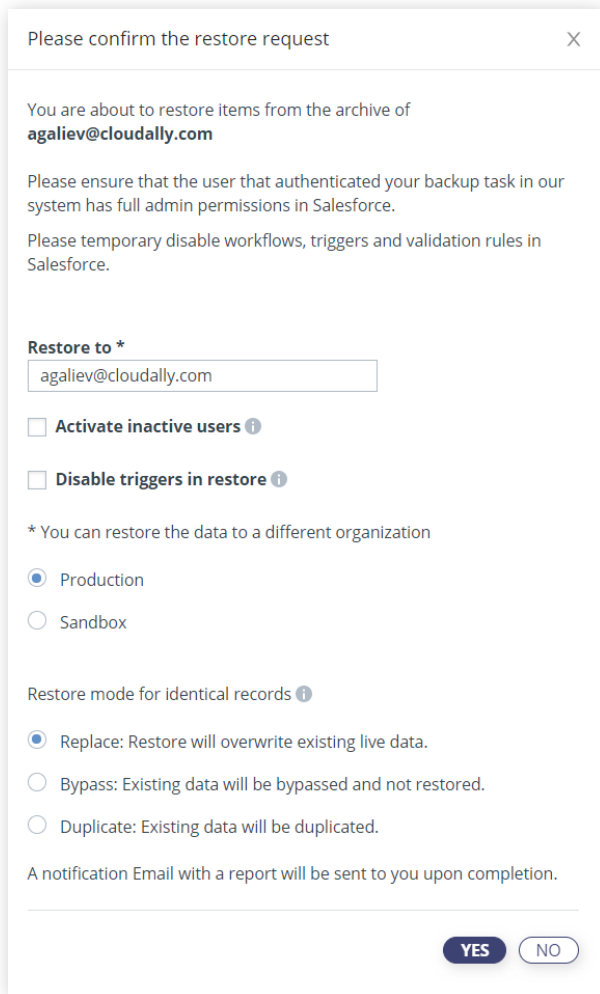
<input type="checkbox"/>	Type	Name	Date
<input type="checkbox"/>	> 📁	Express Logistics and Transport Commerical logistics and transportation company. 0013X00002UoGeVQAV	Dec 6 2019 10:09 AM
<input type="checkbox"/>	> 📁	Express Logistics and Transport Commerical logistics and transportation company. 0013X00002UoGeVQAV	Dec 4 2019 02:06 PM

The **Restore or download Salesforce from <account name> archive** page is displayed. This page displays the search results with the details such as type, name, and last modified date.

3. Select the checkbox adjacent to the required items to be restored or downloaded. When at least one item is selected the buttons **Restore** and **Download** become available.

Confirm the Restore or Download

If you click the **Restore** button, the restore confirmation dialog window appears



Please confirm the restore request

You are about to restore items from the archive of **agaliev@cloudally.com**

Please ensure that the user that authenticated your backup task in our system has full admin permissions in Salesforce.

Please temporary disable workflows, triggers and validation rules in Salesforce.

Restore to *

agaliev@cloudally.com

Activate inactive users ⓘ

Disable triggers in restore ⓘ

* You can restore the data to a different organization

Production

Sandbox

Restore mode for identical records ⓘ

Replace: Restore will overwrite existing live data.

Bypass: Existing data will be bypassed and not restored.

Duplicate: Existing data will be duplicated.

A notification Email with a report will be sent to you upon completion.

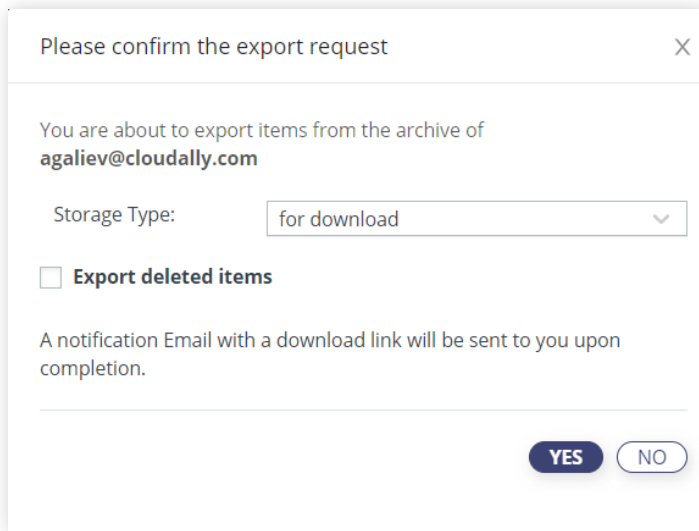
YES NO

1. Enter the account to which the data needs to be restored in the **Restore to** field.

Note: You can restore the data to a different Salesforce instance.

2. Select the radio button adjacent to the instance, to which you want to restore the data to. Available options are **Production** and **Sandbox**.
3. Choose one of the three available restore modes:
 - **Replace:** Restore will overwrite existing live data.
 - **Bypass:** Existing data will be bypassed and not restored.
 - **Duplicate:** Existing data will be duplicated.
4. Click the **YES** button. The selected backup data will be restored to the specified Salesforce instance. When the recovery process is complete the results summary will be sent to your email.

If you click the **Download** button, the download confirmation dialog window appears



Please confirm the export request

You are about to export items from the archive of **agaliev@cloudally.com**

Storage Type:

Export deleted items










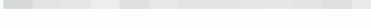


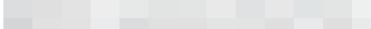





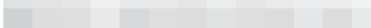





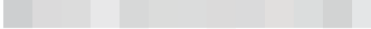


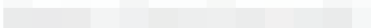


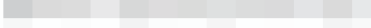


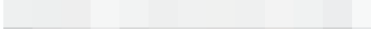





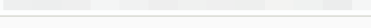


A notification Email with a download link will be sent to you upon completion.

YES **NO**

1. Click the drop-down list and select the storage. Available options are the following: for download, to your Amazon S3, to your Azure Blob, to your Box.com, to your Dropbox, to your Amazon S3 Compatible, to your GCP Storage. If you select options other than “for download”, you may be asked for additional credentials and/or access tokens for the selected storages.
2. If you want to export deleted items. Click the checkbox **Export deleted items**.
3. Click **YES**. The download instructions are sent to your registered email address. The download link is valid only for 72 hours. Exported data is available in a CSV format compatible with Salesforce’s Import Wizard and Data Loader.




Once the Restore/Download process has been initiated, you can view the current status in the *Restore & Download Status* section in the *Restore* page with the details such as Type, Source, Date, Status, and Action.

Restore & download status

TYPE	SOURCE	DATE	STATUS	ACTION
Download	Demo Salesforce Backup December 2019	Dec 18, 2019	In process	  
Download		Dec 17, 2019	Ready	 
Restore		Dec 17, 2019	In process	 
Download		Dec 16, 2019	Ready	 
Restore		Dec 16, 2019	In process	 
Restore		Dec 16, 2019	In process	 
Restore		Dec 15, 2019	In process	 
Restore		Dec 15, 2019	In process	 
Restore		Dec 12, 2019	In process	 
Restore		Dec 12, 2019	In process	 
Restore		Dec 12, 2019	In process	 
Restore		Dec 12, 2019	In process	 
Restore		Dec 12, 2019	In process	 
Restore		Dec 12, 2019	In process	 

View 1 - 15 of 29


 << < Page of 2 > >>

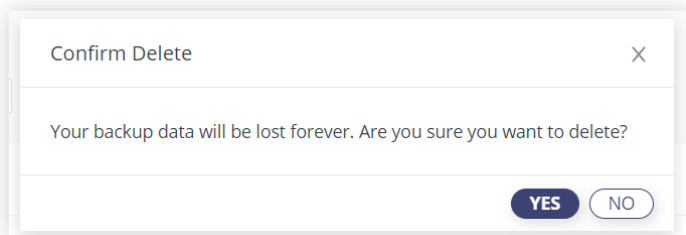
In the Action column, you can click on the  icon to view the details in a popup window. You can also click the  icon and click **Yes** in the *Confirm Cancellation* window to cancel the ongoing process. To download click on the  icon.

Remove CloudAlly Backup

You can remove the entire backup service from your account, if you do not want to use it further. This section guides you through the process of removing Salesforce backup services.

Remove an Entire Backup Service

To remove an entire backup service, click the  icon adjacent to the backup task you want to remove, from the *Backups* page.

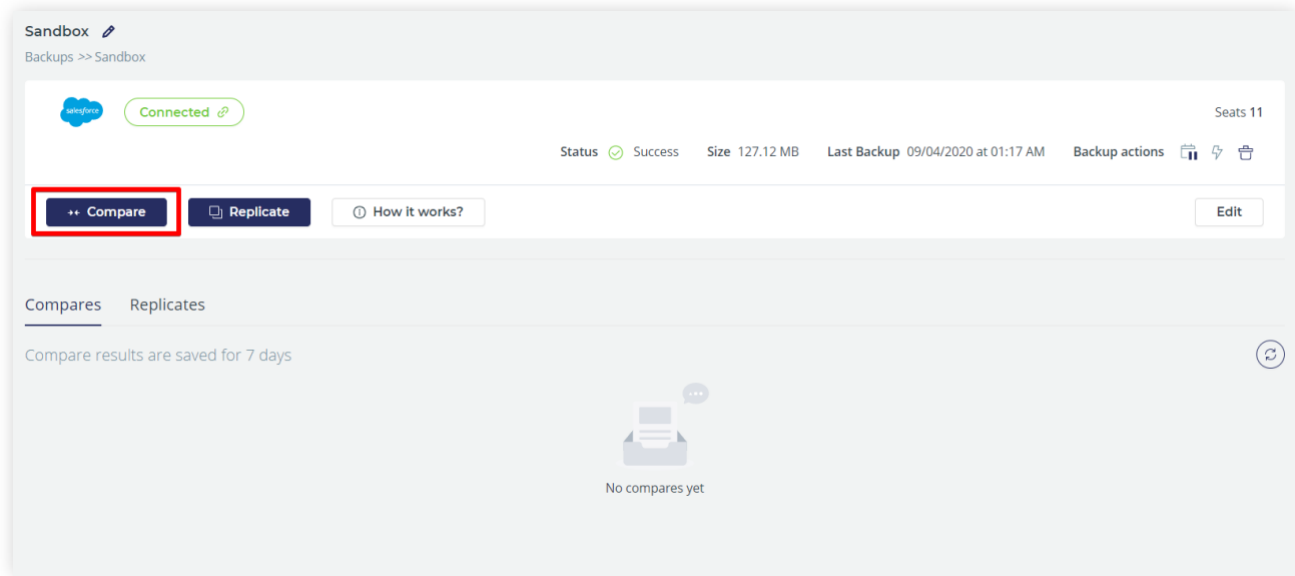


The *Confirm Delete* pop-up window is displayed with a warning message. Click the **YES** button. The selected backup service and all associated data is removed from your account.

Compare your data or metadata

With our Salesforce **Compare** feature you have a powerful tool to compare your data or metadata across backups and/or your production Salesforce database. You can compare any backup snapshot or Salesforce Production/Sandbox and, in case of metadata, even to other organizations.

The Compare tool is situated in your backup task details menu:

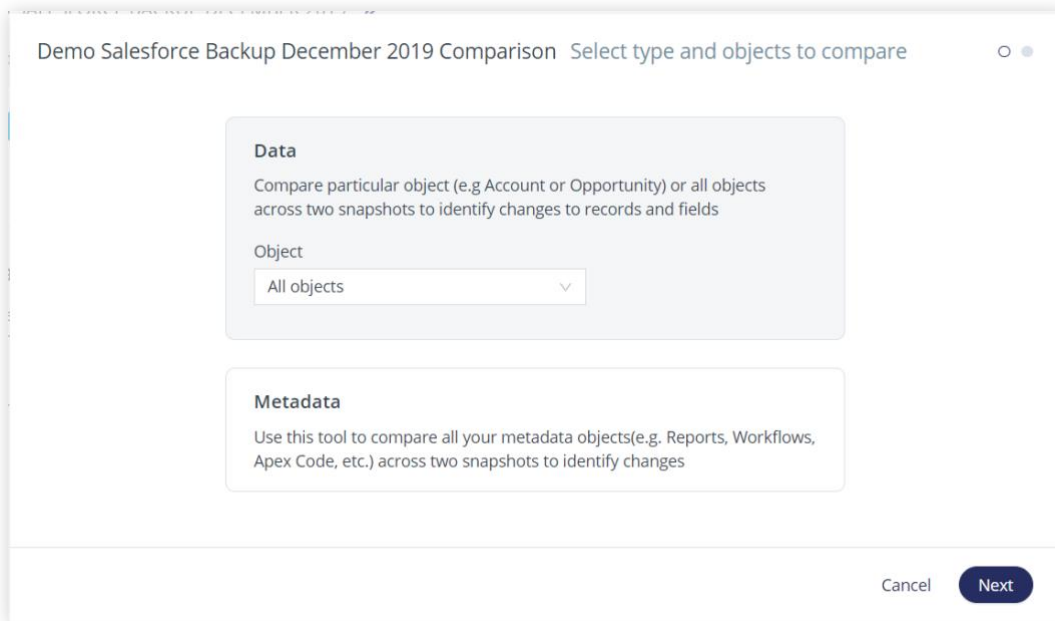


Comparing data

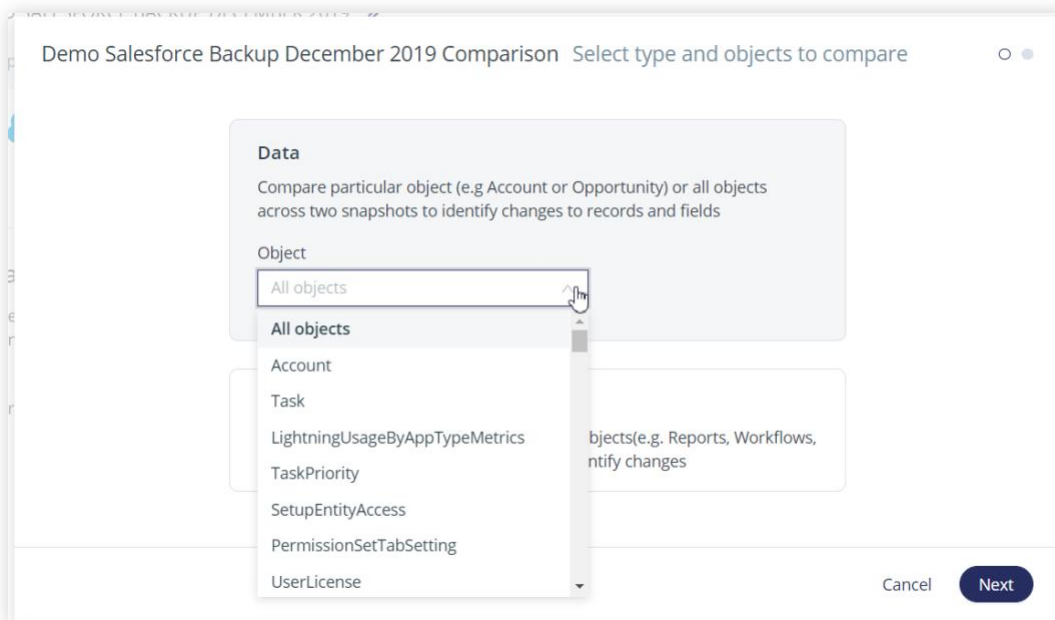
Initializing the Data Comparison

In order to initiate the comparison procedure please follow these steps:

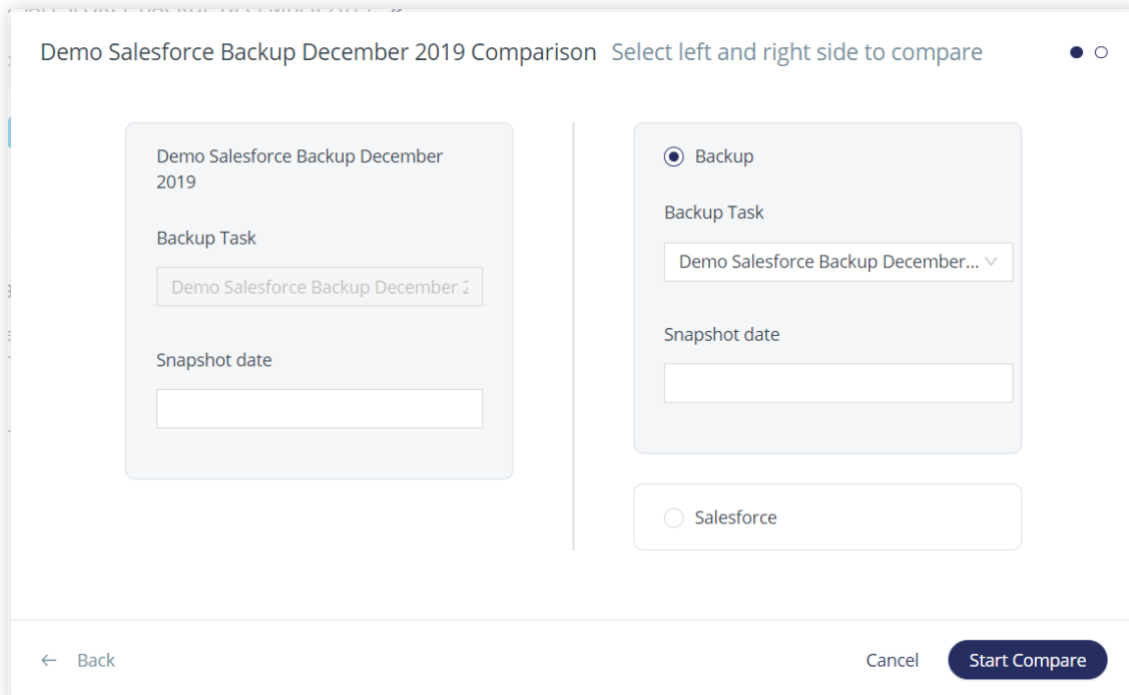
1. Click the **Compare** button in the backup details page.
2. The compare dialog screen is displayed. The data comparison option is selected by default:



3. You can select which objects you want to compare. By default, all objects are compared during the operation. You can select an object from the drop-down menu:



- In the next step you are prompted to select the date of the sources of the data for the comparison:



Demo Salesforce Backup December 2019 Comparison Select left and right side to compare

Demo Salesforce Backup December 2019

Backup Task

Demo Salesforce Backup December 2

Snapshot date

Backup

Backup Task

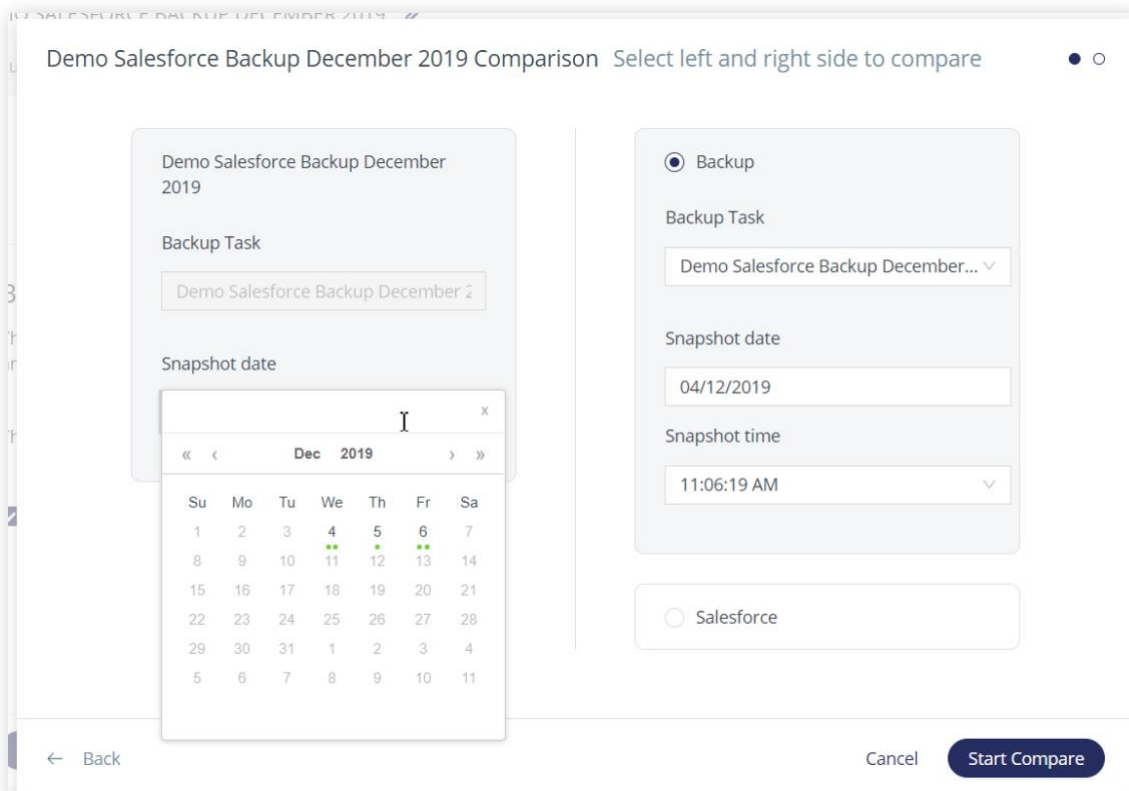
Demo Salesforce Backup December...

Snapshot date

Salesforce

← Back Cancel Start Compare

- In the left panel of the page you can select the date of the backup task for which you initiated the comparison. The task here can't be changed. Below you can select the date of the backup, and, if more than one backup had been performed on the selected date, time of the backup.



Demo Salesforce Backup December 2019 Comparison Select left and right side to compare

Demo Salesforce Backup December 2019

Backup Task

Demo Salesforce Backup December 2

Snapshot date

Dec 2019

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4
5	6	7	8	9	10	11

Backup

Backup Task

Demo Salesforce Backup December...

Snapshot date

04/12/2019

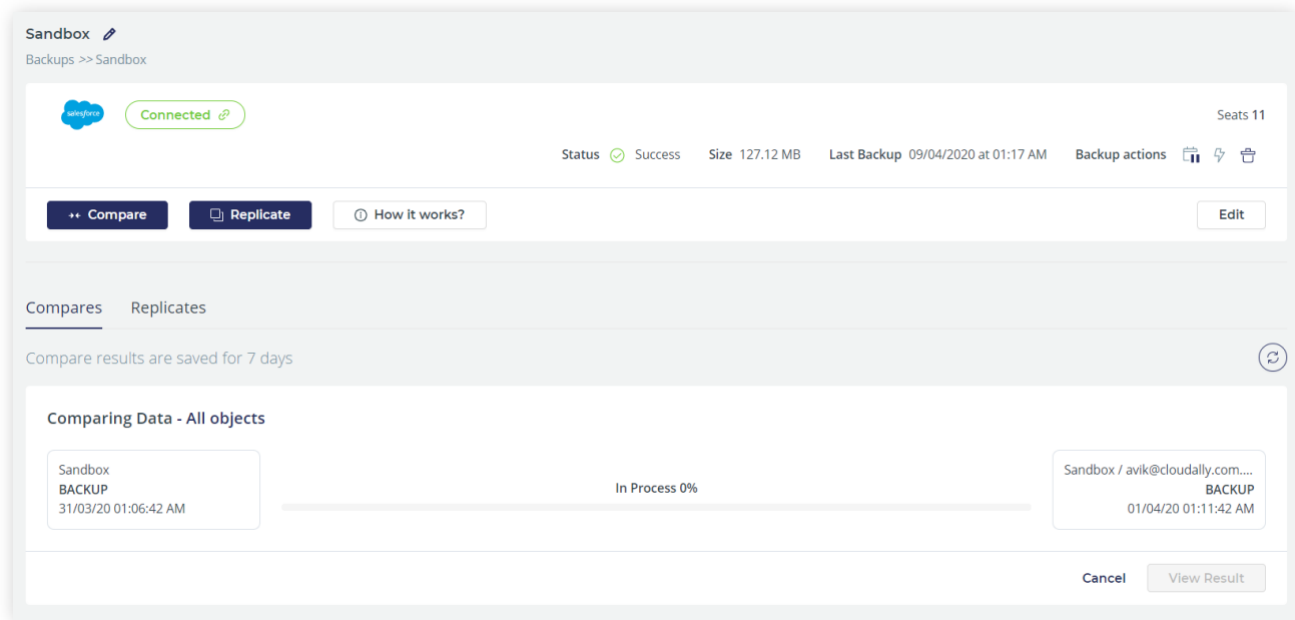
Snapshot time

11:06:19 AM

Salesforce

← Back Cancel Start Compare

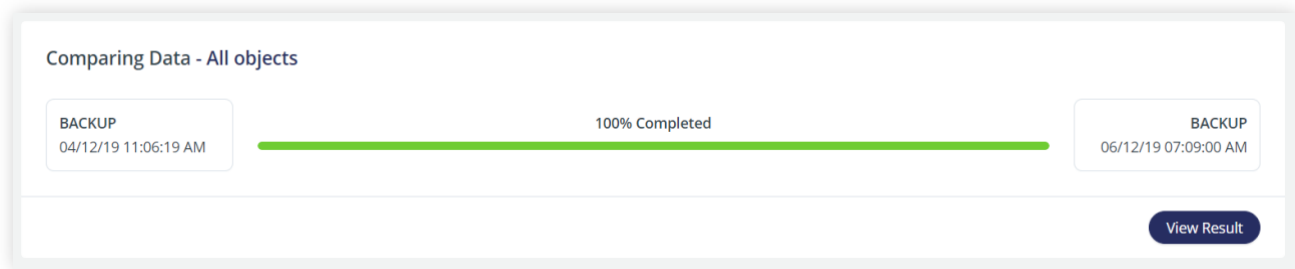
- In the right panel you can either select the backup task that will be used for comparison, or the Salesforce production database.
- Once you have set the data sources click the **Start Compare** button to start the process. The comparison task is started in the background, and the results are available as soon as it is finished.



- You can cancel the task with the **Cancel** button before it is finished.

Viewing the Data Comparison Results

Once the comparison task is finished the **View Result** button becomes available.



Clicking on the **View Result** button takes you to the Compare page:

BACKUPS

Backups >> Demo Salesforce Backup December 2019 >> Compare

Backup task Demo Salesforce Backup December 2019 04/12/19 11:06:19 AM			Backup task Demo Salesforce Backup December 2019 06/12/19 07:09:00 AM		
Total Records	Unique Records	Changed Records	Unique Records	Total Records	
11	0	0	14	25	EventLogFile
14	0	3	1	15	Account
625	0	0	4	668	ObjectPermissions
149	0	0	34	183	LoginGeo

The results in this page are organized in a table displaying the Total number of records, the number of Unique records in each of the data sources and the number of changed records in each of the objects found in the Salesforce database at the point of backups (or in the production database respectively).

In order to find more details on the Unique or Changed elements you can click the corresponding numbers in the table – they contain links to the “comma separated values” (.csv) files containing detailed information on the unique or changed items in the corresponding object.

The CSV files created for the Unique and the Changed records are essentially different and describe different aspects of the records. Please see below an example of a CSV file created for Unique records in an item:

	A	B	C	D	E	F	G	H	I	J	K
1	Id	ParentId	SubjectType	PermissionsCreate	PermissionsRead	PermissionsEdit	PermissionsDelete	PermissionsViewAllRecords	PermissionsModifyAllRecords	CreatedDate	CreatedById
2	1103X00000n76eFQAQ	0PS3X0000001YY5WAO	Case	FALSE	TRUE	FALSE	FALSE	TRUE	FALSE	2019-12-06T05:58:55.000Z	0053X00000A WgWtQAL
3	1103X00000n76eiQAA	0PS3X0000001YY5WAO	Individual	FALSE	TRUE	FALSE	FALSE	TRUE	FALSE	2019-12-06T05:58:55.000Z	0053X00000A WgWtQAL
4	1103X00000n76eaQAA	0PS3X0000001YY5WAO	DuplicateRecordSet	FALSE	TRUE	FALSE	FALSE	TRUE	FALSE	2019-12-06T05:58:55.000Z	0053X00000A WgWtQAL
5	1103X00000n76eYQAQ	0PS3X0000001YY5WAO	DataUsePurpose	FALSE	TRUE	FALSE	FALSE	TRUE	FALSE	2019-12-06T05:58:55.000Z	0053X00000A WgWtQAL
6	1103X00000n76fRQAQ	0PS3X0000001YY5WAO	WorkFeedbackRequest	TRUE	TRUE	TRUE	FALSE	TRUE	FALSE	2019-12-06T05:58:55.000Z	0053X00000A WgWtQAL
7	1103X00000n76eiQAA	0PS3X0000001YY5WAO	Idea	FALSE	TRUE	FALSE	FALSE	TRUE	FALSE	2019-12-06T05:58:55.000Z	0053X00000A WgWtQAL
8	1103X00000n76eCQAQ	0PS3X0000001YY5WAO	AuthorizationFormDataUse	FALSE	TRUE	FALSE	FALSE	TRUE	FALSE	2019-12-06T05:58:55.000Z	0053X00000A WgWtQAL
9	1103X00000n76eyQAA	0PS3X0000001YY5WAO	MetricDataLink	FALSE	TRUE	FALSE	FALSE	TRUE	FALSE	2019-12-06T05:58:55.000Z	0053X00000A WgWtQAL
10	1103X00000n76fRQAA	0PS3X000001ZUANWAO	Entity__c	FALSE	TRUE	FALSE	FALSE	TRUE	FALSE	2019-12-06T06:00:42.000Z	0053X00000A WgWtQAL
11	1103X00000n76fOQAQ	0PS3X0000001YY5WAO	WorkFeedback	TRUE	TRUE	TRUE	FALSE	TRUE	FALSE	2019-12-06T05:58:55.000Z	0053X00000A WgWtQAL
12	1103X00000n76f8QAA	0PS3X0000001YY5WAO	PushTopic	FALSE	TRUE	FALSE	FALSE	TRUE	FALSE	2019-12-06T05:58:55.000Z	0053X00000A WgWtQAL
13	1103X00000n76eTQAQ	0PS3X0000001YY5WAO	ContactPointTypeConsent	FALSE	TRUE	FALSE	FALSE	TRUE	FALSE	2019-12-06T05:58:55.000Z	0053X00000A WgWtQAL
14	1103X00000n76eWQAQ	0PS3X0000001YY5WAO	DandBCompany	TRUE	TRUE	TRUE	TRUE	TRUE	TRUE	2019-12-06T05:58:55.000Z	0053X00000A WgWtQAL
15	1103X00000n76eDQAQ	0PS3X0000001YY5WAO	AuthorizationFormText	FALSE	TRUE	FALSE	FALSE	TRUE	FALSE	2019-12-06T05:58:55.000Z	0053X00000A WgWtQAL

The results page can be filtered via the Search bar at the top of the page. The search is case insensitive and requires just a partial match of the name of the objects.

BACKUPS

Backups >> Demo Salesforce Backup December 2019 >> Compare

Backup task Demo Salesforce Backup December 2019 04/12/19 11:06:19 AM		Q log	Backup task Demo Salesforce Backup December 2019 06/12/19 07:09:00 AM	
Total Records	Unique Records	Changed Records	Unique Records	Total Records
11	0	EventLogFile 0	14	25
149	0	LoginGeo 0	34	183

The following 63 data object(s) had no changes

The following 2 data object(s) exist only in Backup task Demo Salesforce Backup December 2019 - 06/12/19 07:09:00 AM

At the bottom of the page you can find the summary of the objects that had no changes, and the objects that only exist in either of the data sources. These numbers can also be clicked, displaying the detailed lists of respective objects:

The following 63 data object(s) had no changes

- Task
- LightningUsageByAppTypeMetrics
- TaskPriority
- UserLicense
- OpportunityHistory
- ContentDocumentLink
- VerificationHistory
- DuplicateRule
- ClientBrowser
- FiscalYearSettings
- UserAppInfo
- LightningUsageByBrowserMetrics
- ContentWorkspacePermission
- TabDefinition
- UserLogin
- CaseHistory
- SolutionStatus
- PackageLicense
- Pricebook2
- ContentDocumentHistory
- AssignmentRule
- CampaignMemberStatus
- Period
- LightningExitByPageMetrics
- UserAppMenuItem
- PricebookEntry
- Campaign
- FlowDefinitionView
- CaseStatus
- IdpEventLog
- PartnerRole
- Group
- Organization
- Product2
- ContractStatus
- Folder
- FieldSecurityClassification
- Case
- LeadStatus

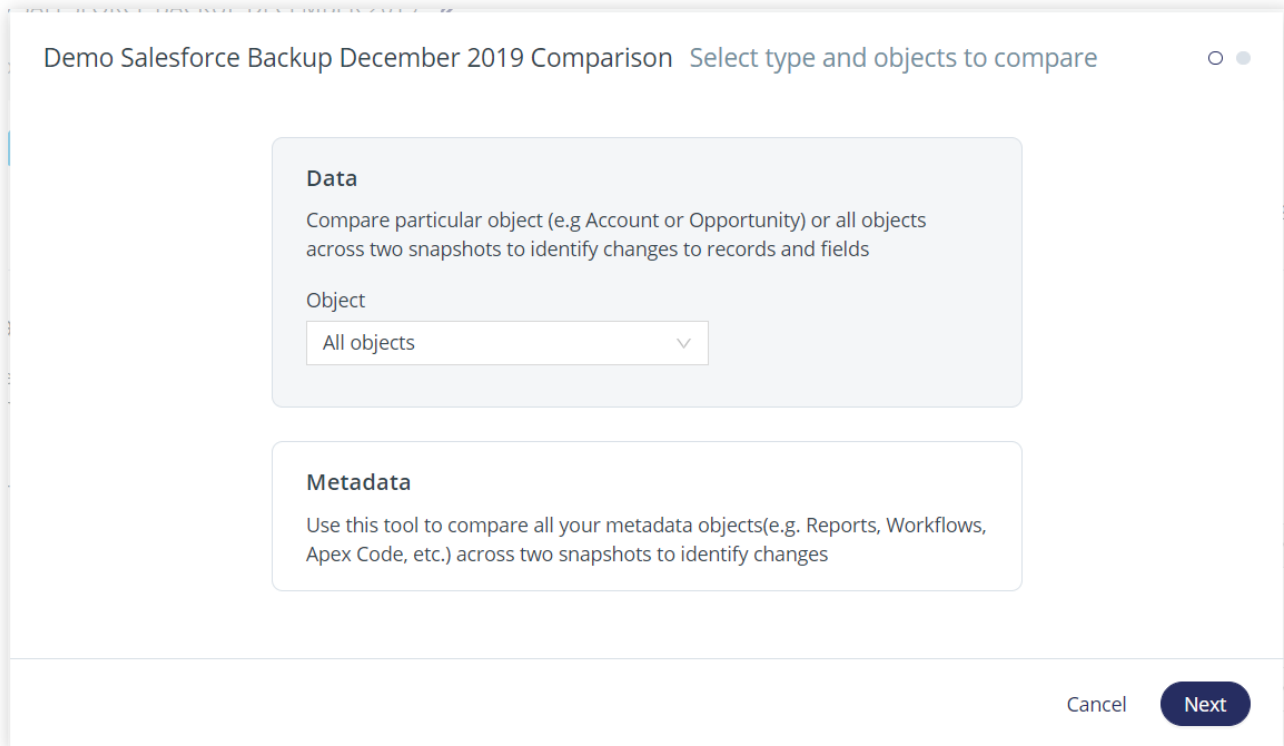
Cancel

Comparing Metadata

Initializing the Metadata comparison

In order to initiate the comparison procedure please follow these steps:

1. Click the **Compare** button in the backup details page.
2. The compare dialog screen is displayed. The data comparison option is selected by default. Select **Metadata** option:



Demo Salesforce Backup December 2019 Comparison Select type and objects to compare

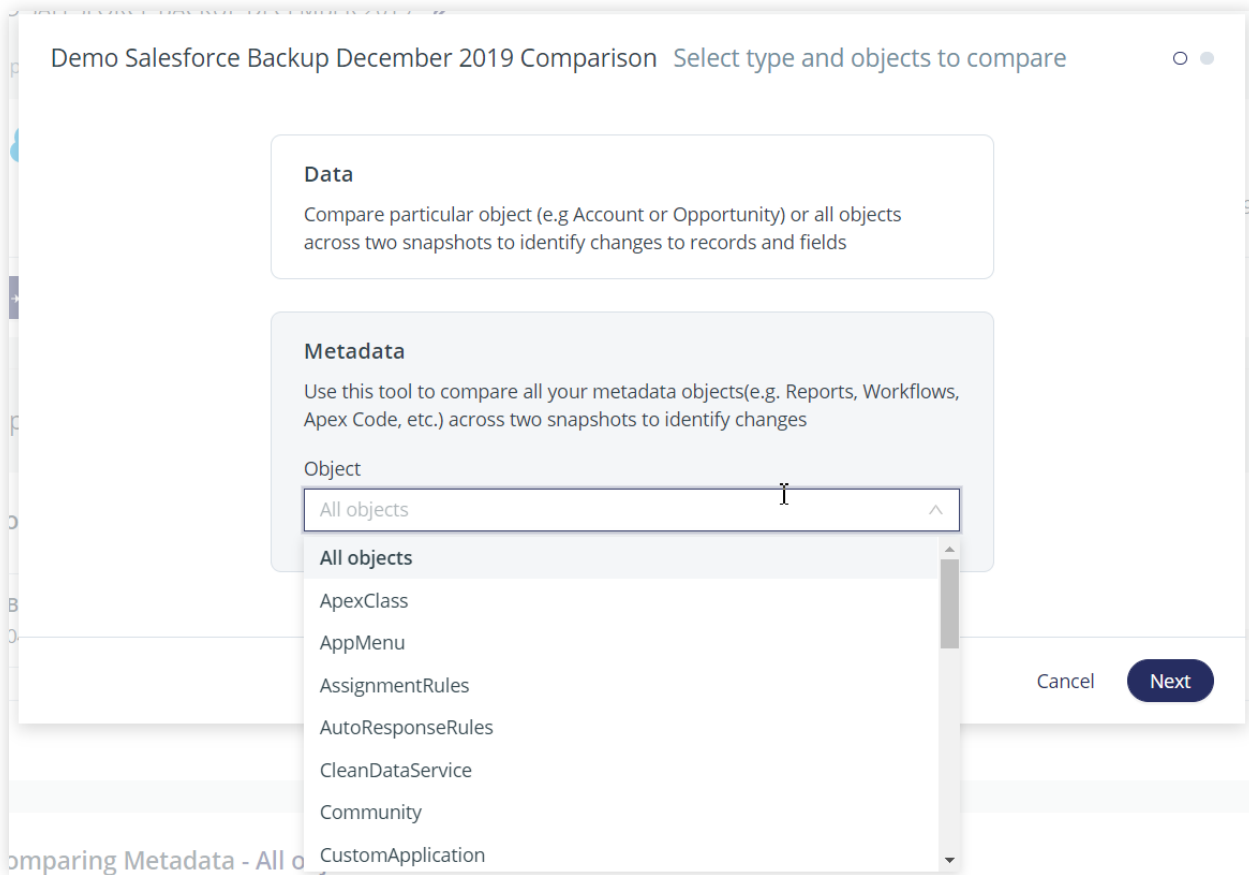
Data
Compare particular object (e.g Account or Opportunity) or all objects across two snapshots to identify changes to records and fields

Object
All objects

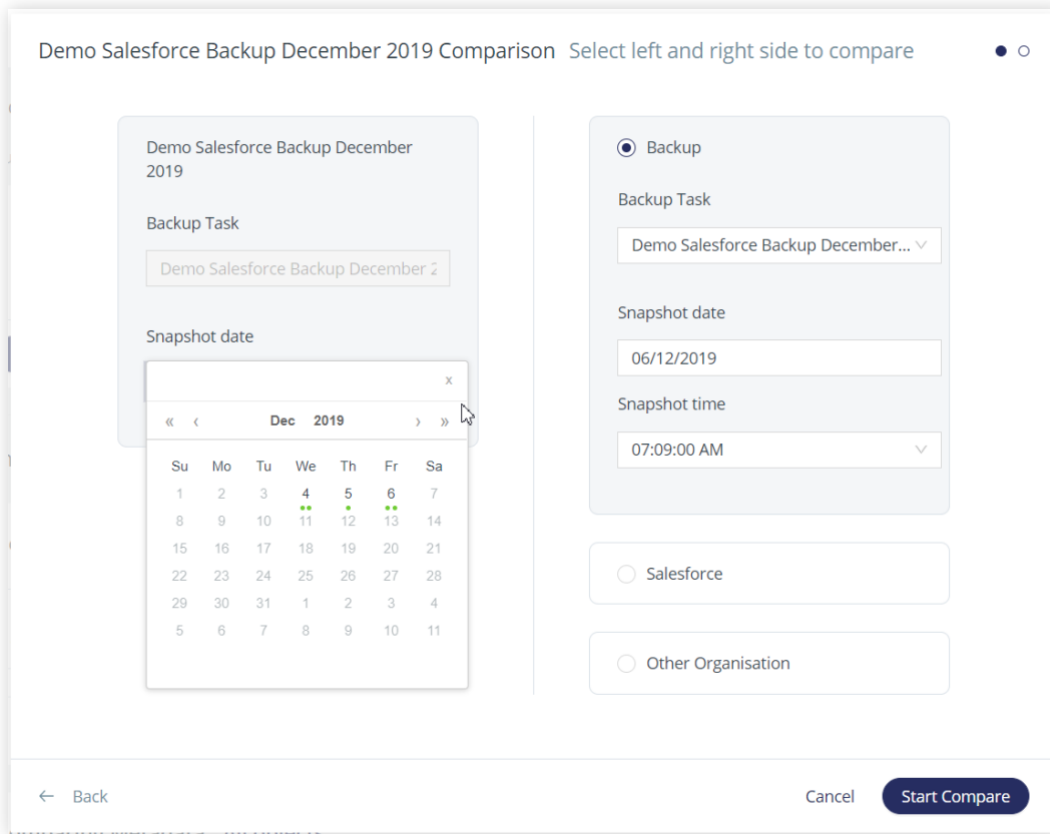
Metadata
Use this tool to compare all your metadata objects(e.g. Reports, Workflows, Apex Code, etc.) across two snapshots to identify changes

Cancel Next

3. You can select which objects you want to compare. By default, all objects are compared during the operation. You can select an object from the drop-down menu:



- In the next step you are prompted to select the date of the sources of the data for the comparison:



Demo Salesforce Backup December 2019 Comparison Select left and right side to compare

Demo Salesforce Backup December 2019

Backup Task

Demo Salesforce Backup December z

Snapshot date

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4
5	6	7	8	9	10	11

Backup

Backup Task

Demo Salesforce Backup December... ▾

Snapshot date

06/12/2019

Snapshot time

07:09:00 AM ▾

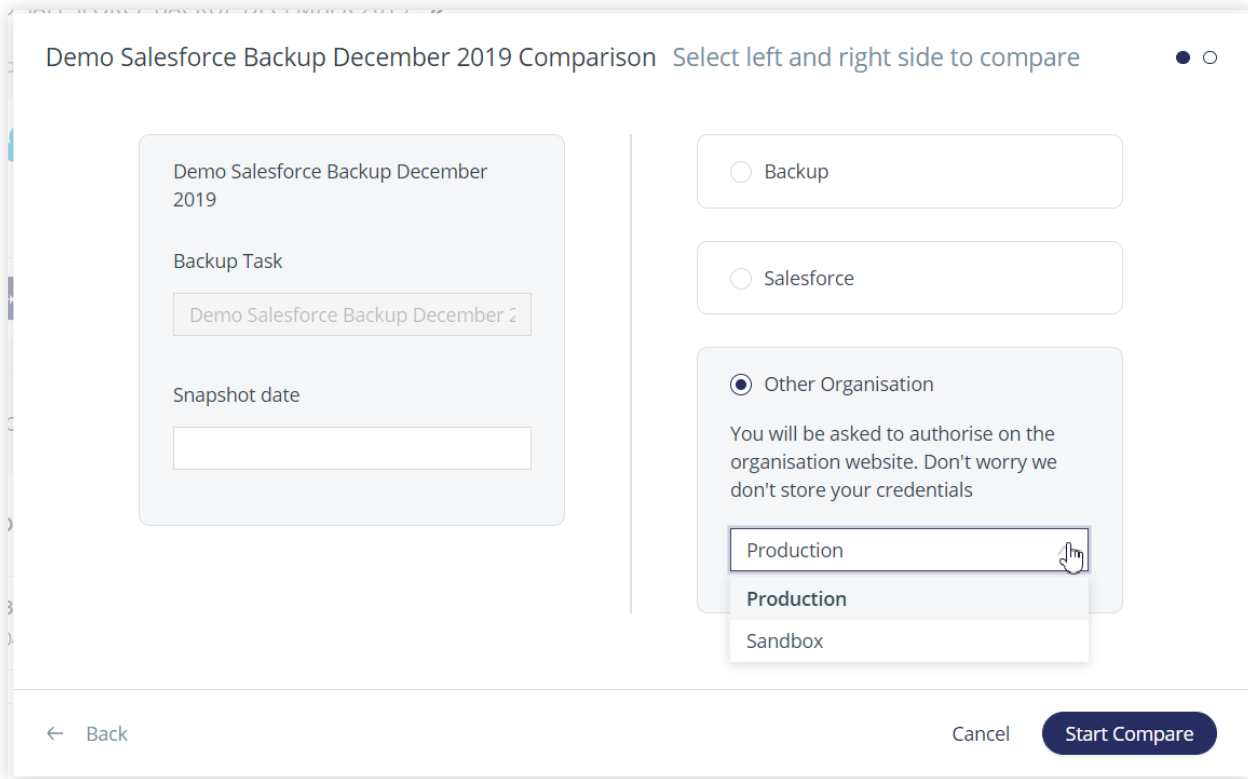
Salesforce

Other Organisation

← Back Cancel Start Compare

- In the left panel of the page you can select the date of the backup task for which you initiated the comparison. The task here can't be changed. Below you can select the date of the backup, and, if more than one backup had been performed on the selected date, time of the backup.

- In the right panel you can either select the backup task that will be used for comparison, the Salesforce production database, or metadata from another organization. In the latter case you can choose whether to use the production database, or the sandbox:



Demo Salesforce Backup December 2019 Comparison Select left and right side to compare

Demo Salesforce Backup December 2019

Backup Task

Demo Salesforce Backup December 2019

Snapshot date

Backup

Salesforce

Other Organisation

You will be asked to authorise on the organisation website. Don't worry we don't store your credentials

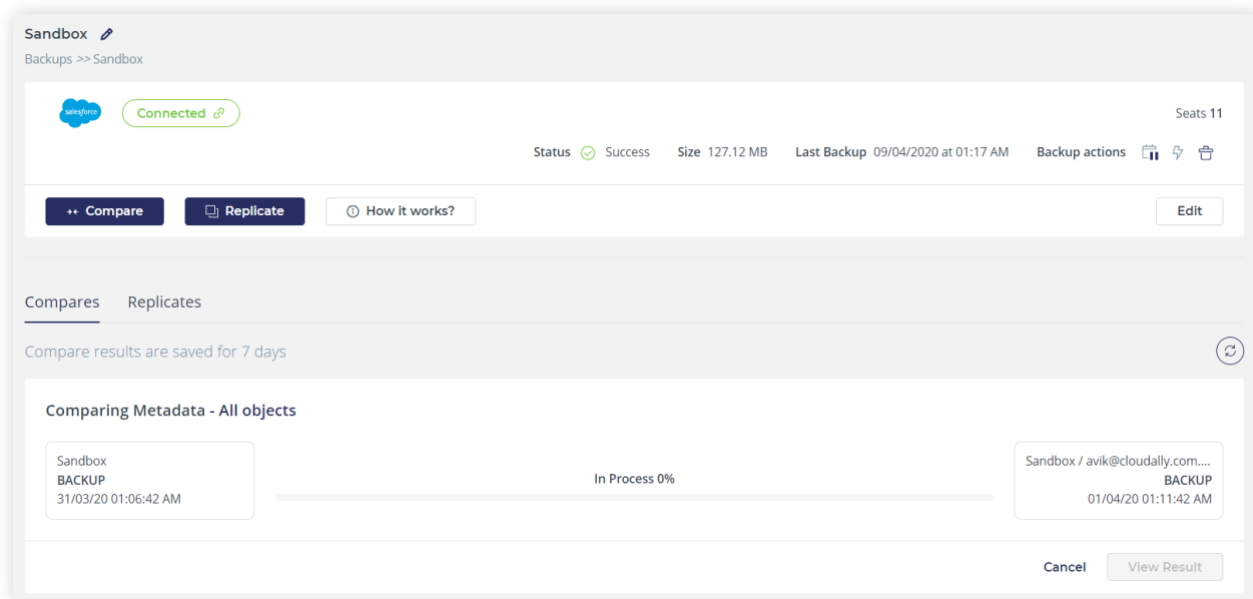
Production

Production

Sandbox

Back Cancel Start Compare

- Once you have set the data sources click the **Start Compare** button to start the process. The comparison task is started in the background, and the results are available as soon as it is finished.



Sandbox

Backups >> Sandbox

Connected

Seats 11

Status Success Size 127.12 MB Last Backup 09/04/2020 at 01:17 AM Backup actions

Compare Replicate How it works? Edit

Compares Replicates

Compare results are saved for 7 days

Comparing Metadata - All objects

Sandbox BACKUP 31/03/20 01:06:42 AM

In Process 0%

Sandbox / avik@cloudally.com... BACKUP 01/04/20 01:11:42 AM

Cancel View Result

- You can cancel the task with the **Cancel** button before it is finished.

Viewing the Metadata Comparison Results

Once the comparison task is finished the **View Results** button becomes available.

Comparing Metadata - All objects

BACKUP
04/12/19 11:06:19 AM

100% Completed

BACKUP
06/12/19 07:09:00 AM

View Result

Clicking on the **View Results** takes you to the **Compare** page:

BACKUPS

Backups >> Demo Salesforce Backup December 2019 >> Compare

Backup task Demo Salesforce Backup December 2019
04/12/19 11:06:19 AM

Backup task Demo Salesforce Backup December 2019
06/12/19 07:09:00 AM

Total Records	Unique Records	Changed Records	Unique Records	Total Records
objects				
88	0	4	0	88
profiles				
36	0	27	1	37

The following 20 metadata object(s) had no changes

The comparison results are organized in the page in a table displaying the Total number of records, the number of Unique records in both the data sources and the number of changed records for Objects and Profiles.

You can filter the page using the search bar situated in the top portion of the page:

BACKUPS

Backups >> Demo Salesforce Backup December 2019 >> Compare

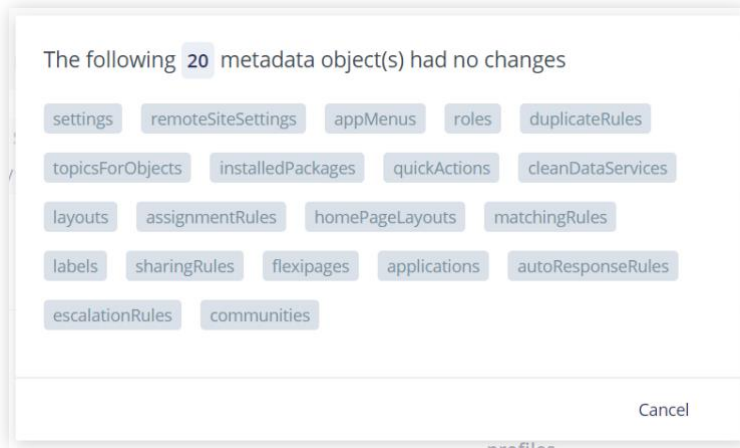
Backup task Demo Salesforce Backup December 2019
04/12/19 11:06:19 AM

Backup task Demo Salesforce Backup December 2019
06/12/19 07:09:00 AM

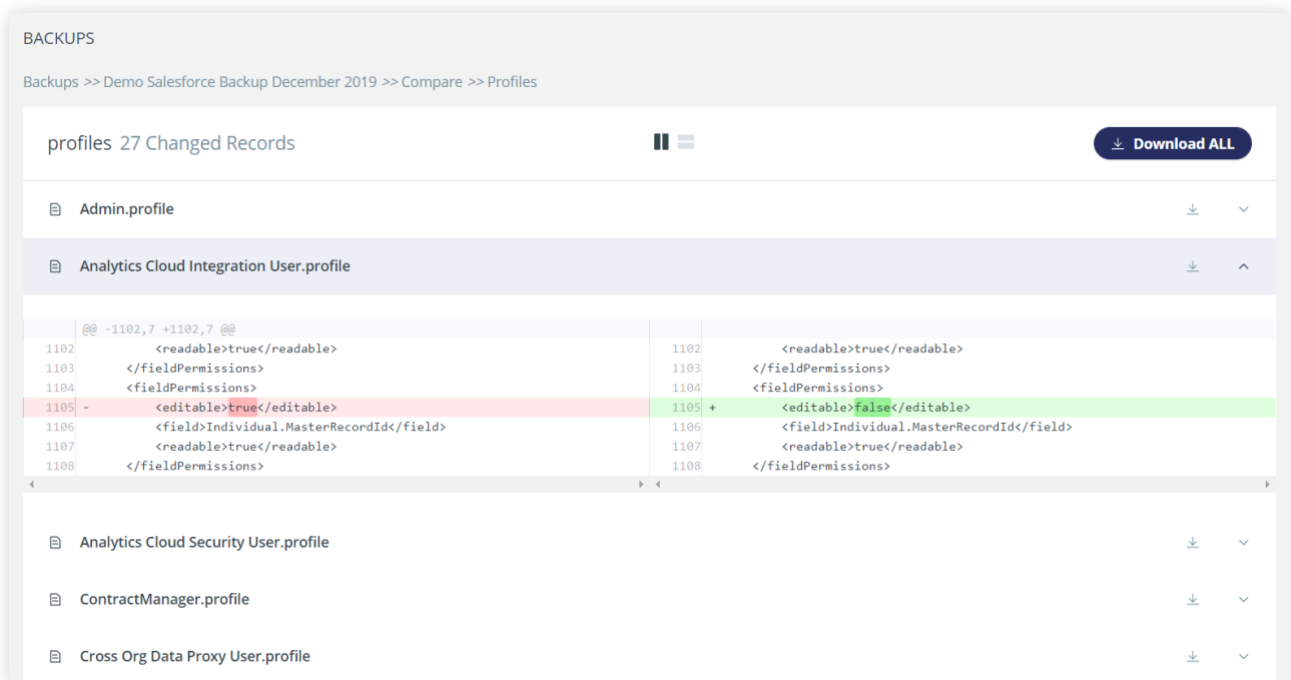
Total Records	Unique Records	Changed Records	Unique Records	Total Records
profiles				
36	0	27	1	37

The following 20 metadata object(s) had no changes

At the bottom of the page you can find the summary of the number of objects that have no changes and the objects found only in one of the data sources. Clicking the numbers of such objects displays the list of corresponding objects:



In order to find more details on the Unique or Changed elements you can click the corresponding numbers in the table. This leads you to the comparison GUI.



BACKUPS

Backups >> Demo Salesforce Backup December 2019 >> Compare >> Profiles

profiles 27 Changed Records || = Download ALL

- Admin.profile ↓
- Analytics Cloud Integration User.profile ↓ ↑

	@ -1102,7 +1102,7 @@		
1102	<readable>true</readable>	1102	<readable>true</readable>
1103	</fieldPermissions>	1103	</fieldPermissions>
1104	<fieldPermissions>	1104	<fieldPermissions>
1105	<editable>true</editable>	1105	<editable>>false</editable>
1106	<field>Individual.MasterRecordId</field>	1106	<field>Individual.MasterRecordId</field>
1107	<readable>true</readable>	1107	<readable>true</readable>
1108	</fieldPermissions>	1108	</fieldPermissions>

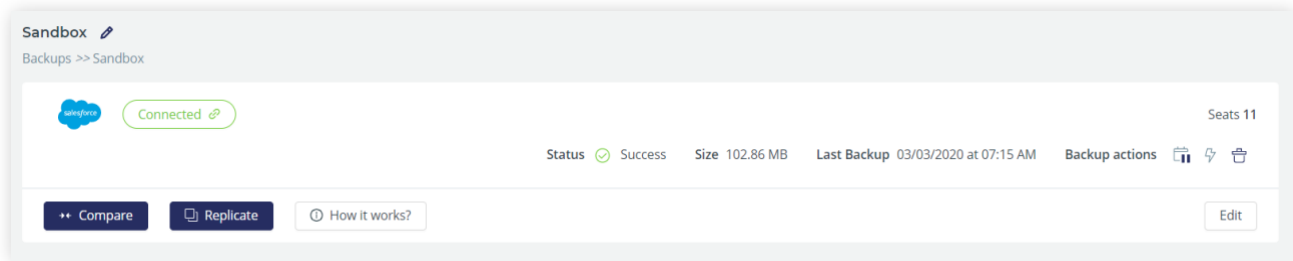
- Analytics Cloud Security User.profile ↓
- ContractManager.profile ↓
- Cross Org Data Proxy User.profile ↓

You can expand any row of the table by clicking the ↓ button to view the comparison results, or you can download an archive with the corresponding objects via the ↓ button. The records can be displayed side-by-side, or over-under – you can switch this with the || = buttons.

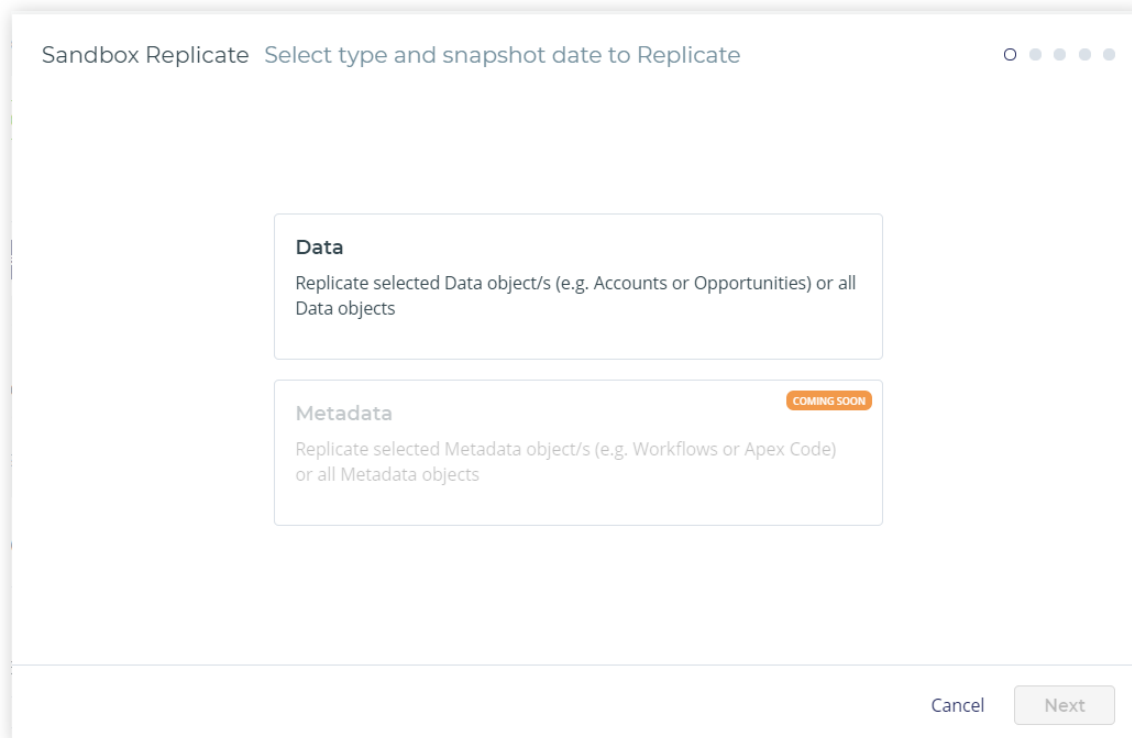
Replicating your database

With our Salesforce **Replicate** feature you have a powerful tool to copy your data or metadata from your backup to a Salesforce sandbox database. The tool has a wide range of options and you can choose whether to copy all data or just selected objects, apply various functions on data and copy data to other Salesforce organizations.

The **Replicate** tool is situated in your backup task details menu:

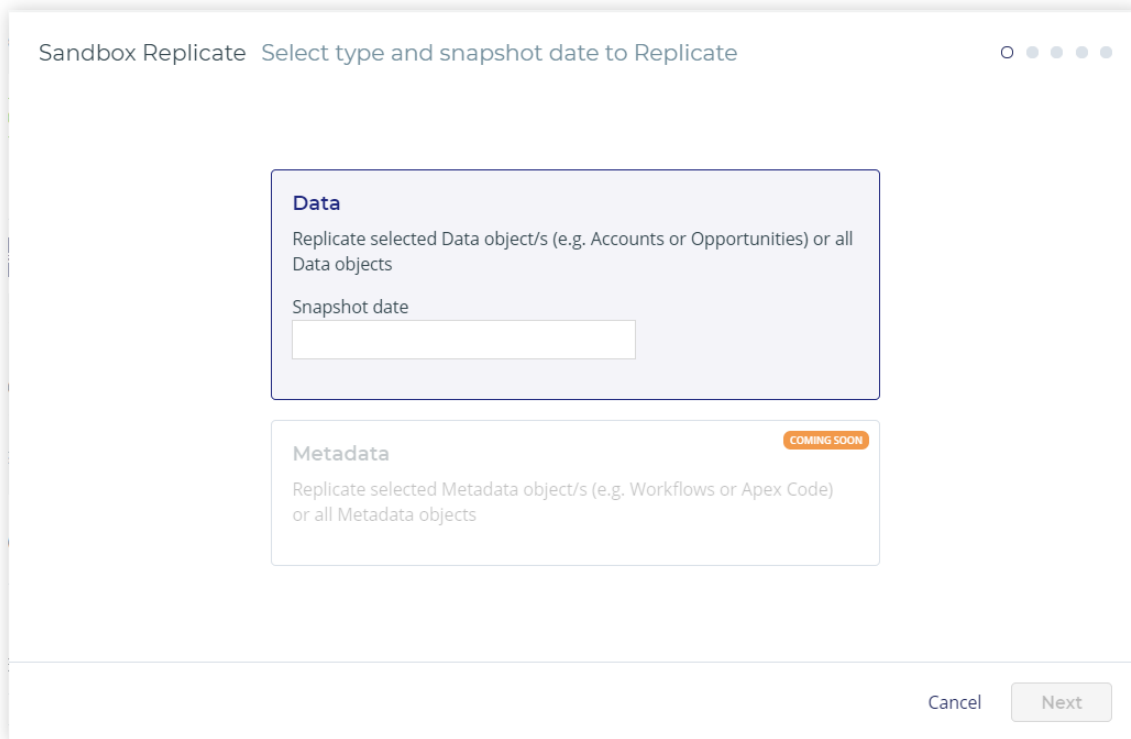


Clicking the Replicate button opens the Replicate menu. At the moment we only offer the Data replication, our engineers are working to add the Metadata replication.



Data

Select **Data** in the **Replicate** tool menu:



Sandbox Replicate Select type and snapshot date to Replicate

Data

Replicate selected Data object/s (e.g. Accounts or Opportunities) or all Data objects

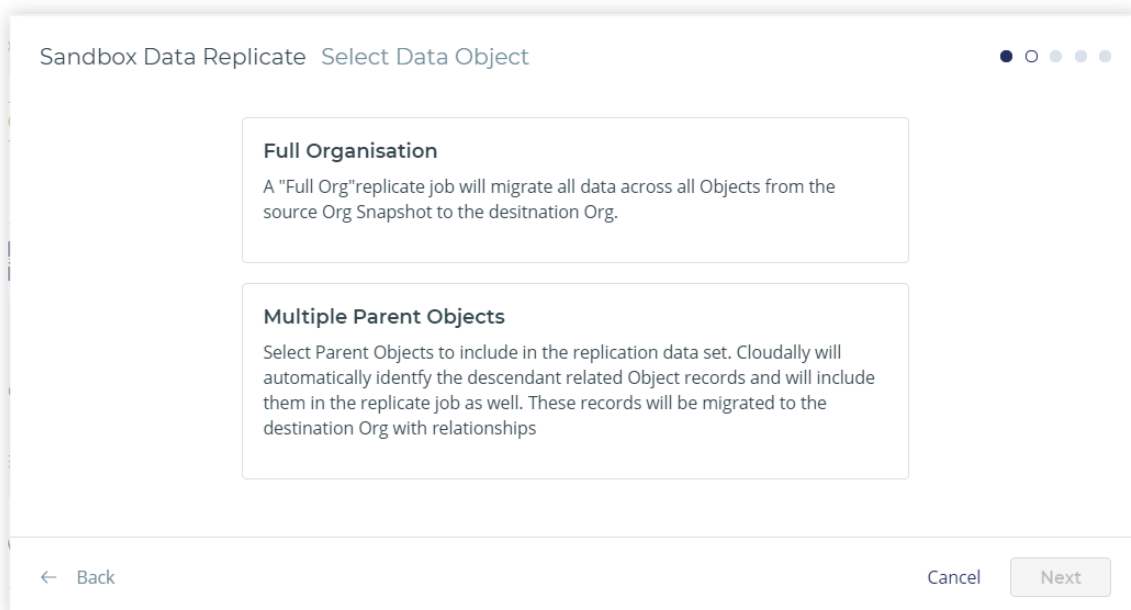
Snapshot date

Metadata COMING SOON

Replicate selected Metadata object/s (e.g. Workflows or Apex Code) or all Metadata objects

Cancel Next

Choose the Snapshot date. If more than one backup had been done on the selected date you are also asked to select backup time. Click **Next**.



Sandbox Data Replicate Select Data Object

Full Organisation

A "Full Org" replicate job will migrate all data across all Objects from the source Org Snapshot to the destination Org.

Multiple Parent Objects

Select Parent Objects to include in the replication data set. Cloudally will automatically identify the descendant related Object records and will include them in the replicate job as well. These records will be migrated to the destination Org with relationships

← Back Cancel Next

You can choose whether you want to restore all Data Objects, or select the Objects to replicate.

- Select **Full Organization** if you want to restore all data objects. See detailed instructions below
- Select **Multiple Parent Objects** option to select the Objects you want replicated and, if needed, apply selection filters on them. See detailed instructions below

Full organization replica

Click the **Full Organization** option in the menu. Click **Next**.

Sandbox Data Replicate Select Data Object

Full Organisation

A "Full Org" replicate job will migrate all data across all Objects from the source Org Snapshot to the destination Org.

Multiple Parent Objects

Select Parent Objects to include in the replication data set. Cloudally will automatically identify the descendant related Object records and will include them in the replicate job as well. These records will be migrated to the destination Org with relationships

← Back Cancel **Next**

Select the destination of the replicated data. You can replicate the data to a sandbox of the original organization or you can send it to a sandbox of a different organization. In the latter case you will be asked to authorize the operation with the credentials of the destination organization.

Sandbox Data Replicate Select Destination

Same Organisation Sandbox
avik@cloudally.com.4rail

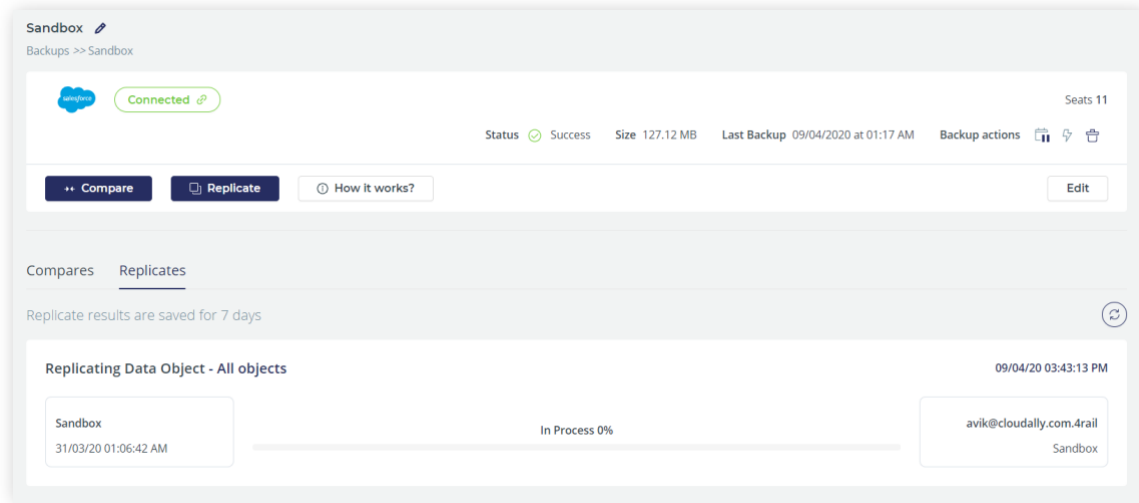
Other Organisation Sandbox
You will be asked to authorise on the organisation website. Don't worry we don't store your credentials

Automatically disable all Validation Rules, Workflows, Triggers and Processes

← Back Cancel **Next**

You can unmark the checkbox **Automatically disable all Validation Rules, Triggers and Processes** if you want these elements to be enabled in the replicated data. By default the checkbox is marked, thus disabling the validation rules, workflows triggers and processes. This is done as a precaution because the said elements may not work well with replicated data.

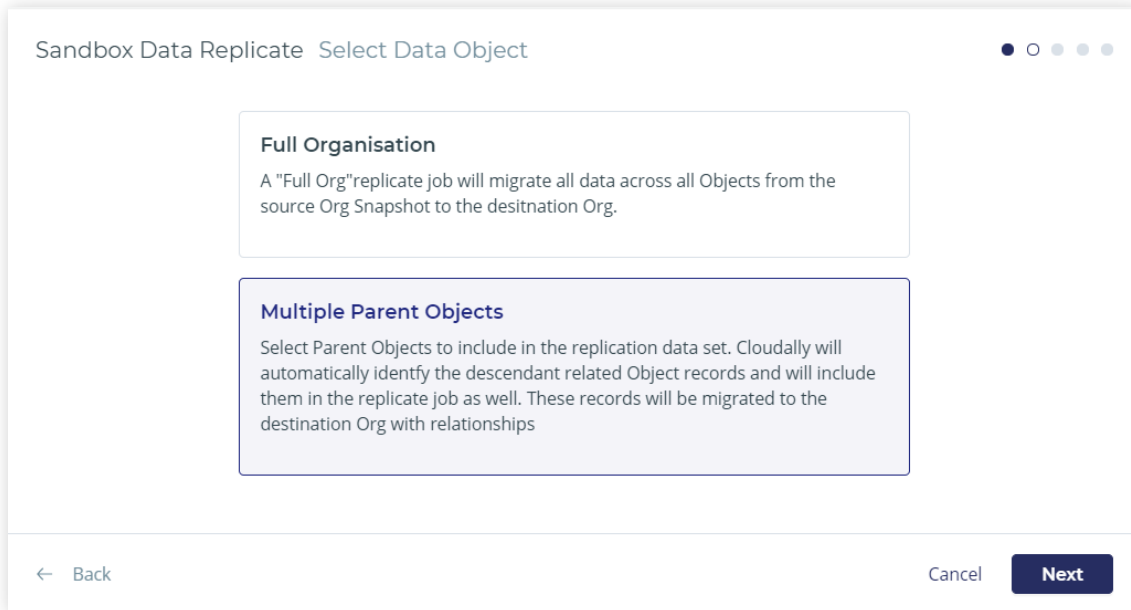
Click **Next** to create the replication task. The task will be assigned to the next available processing machine (may take several minutes). You can view the progress of the task in the Replicates tab of the backup page.



The screenshot displays the CloudAlly interface for a backup named "Sandbox". At the top, it shows "Backups >> Sandbox" and a "Connected" status. Key information includes "Seats 11", "Status: Success", "Size: 127.12 MB", and "Last Backup: 09/04/2020 at 01:17 AM". There are buttons for "Compare", "Replicate", "How it works?", and "Edit". Below this, the "Replicates" tab is active, showing "Replicate results are saved for 7 days". A section titled "Replicating Data Object - All objects" shows a progress bar for "Sandbox" (31/03/20 01:06:42 AM) which is currently "In Process 0%". The task is assigned to "avik@cloudally.com.4rail" and is for the "Sandbox" backup.

Multiple parent objects

Select the **Multiple Parent Objects** option and click **Next**.



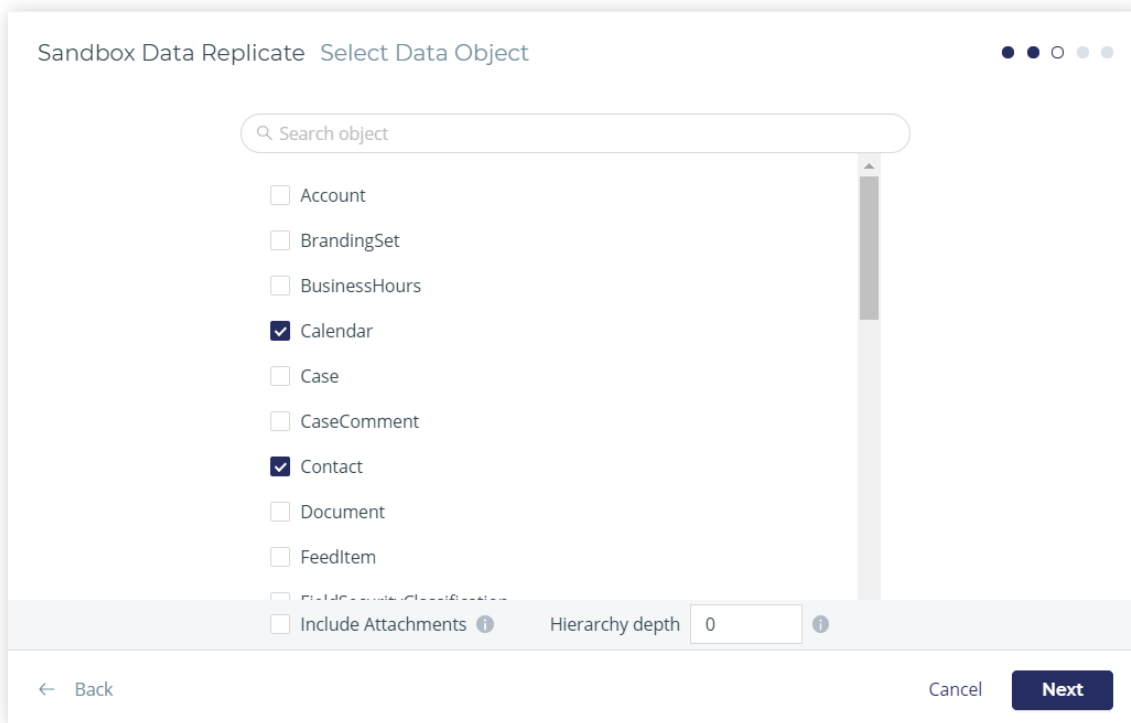
Sandbox Data Replicate Select Data Object

Full Organisation
A "Full Org" replicate job will migrate all data across all Objects from the source Org Snapshot to the destination Org.

Multiple Parent Objects
Select Parent Objects to include in the replication data set. Cloudally will automatically identify the descendant related Object records and will include them in the replicate job as well. These records will be migrated to the destination Org with relationships

← Back Cancel **Next**

You are taken to the step **Select Data Object**:



Sandbox Data Replicate Select Data Object

Search object

- Account
- BrandingSet
- BusinessHours
- Calendar
- Case
- CaseComment
- Contact
- Document
- FeedItem
- Field-Event-Classification
- Include Attachments ⓘ

Hierarchy depth ⓘ

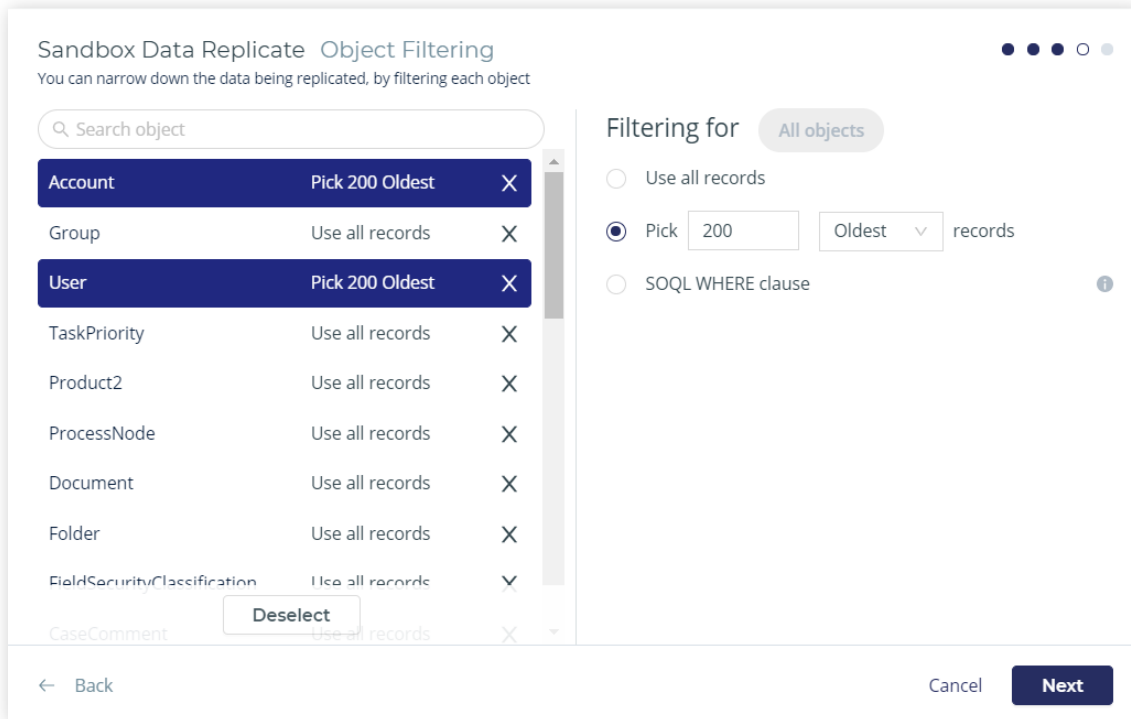
← Back Cancel **Next**

Select the objects you want to replicate. You can search through by typing at least 3 symbols matching part of the name of the object.

Click checkbox **Include attachments** if you want the restored data objects to contain all original attachments

The **Hierarchy depth** field refers to the objects depending on the selected objects or on objects depending on the selected ones, etc.. By default the **Hierarchy depth** is set to 0, meaning only the selected objects will be replicated. You can set the Hierarchy depth to the desired depth, up to 7 levels: all objects depending on the selected objects up to the selected depth will be marked for the next step.

By default all records are selected for replication in the selected Objects. You can set up selection rules manually for any number of objects. In order to select multiple objects click the corresponding lines in the list. You can define different rules for the objects – deselect the objects for which you have already set up the selection and select the other ones.



Sandbox Data Replicate Object Filtering

You can narrow down the data being replicated, by filtering each object

Search object

Account	Pick 200 Oldest	X
Group	Use all records	X
User	Pick 200 Oldest	X
TaskPriority	Use all records	X
Product2	Use all records	X
ProcessNode	Use all records	X
Document	Use all records	X
Folder	Use all records	X
FieldSecurityClassification	Use all records	X
CaseComment	Use all records	X

Deselect

Filtering for All objects

Use all records
 Pick records
 SOQL WHERE clause

← Back Cancel **Next**

In order to define the number of records that need to be replicated click the option **Pick <number> records**. You can fill-in the number of records to be replicated and choose one of the options: Newest, Oldest, or Random:

You can define an SOQL WHERE query that will be applied to select the records for replication. In order to do that click the SOQL WHERE clause option, fill-in the query and press Enter to validate it.

Please note that the replication system only validates the query syntax and doesn't check that the query can be applied to the selected objects. An inapplicable SOQL clause may lead to a failure in the replication procedure.

Sandbox Data Replicate **Object Filtering**
•••○

You can narrow down the data being replicated, by filtering each object

Account	Pick 200 Oldest	X
Group	SOQL WHERE clause	X
User	Pick 200 Oldest	X
TaskPriority	Use all records	X
Product2	SOQL WHERE clause	X
ProcessNode	SOQL WHERE clause	X
Document	Use all records	X
Folder	Use all records	X
FieldSecurityClassification	Use all records	∨
CaseComment	Use all records	X

Deselect

Filtering for All objects

Use all records

Pick Newest records

SOQL WHERE clause ⓘ

Country_c IN ('Canada', 'United Kingdom')

Press Shift + Enter to add a new line without validating the query

✓ Validation Complete

← Back
Cancel Next

Click **Next**. You are taken to the Select Destination step.

Select the destination of the replicated data. You can replicate the data to a sandbox of the original organization or you can send it to a sandbox of a different organization. In the latter case you will be asked to authorize the operation with the credentials of the destination organization.

You can unmark the checkbox **Automatically disable all Validation Rules, Triggers and Processes** if you want these elements to be enabled in the replicated data. By default the checkbox is marked, thus disabling the validation rules, workflows triggers and processes. This is done as a precaution because the said elements may not work well with replicated data.

Sandbox Data Replicate Select Destination ● ● ● ● ○

Same Organisation Sandbox
avik@cloudally.com.4rail

Other Organisation Sandbox
You will be asked to authorise on the organisation website. Don't worry we don't store your credentials

Automatically disable all Validation Rules, Workflows, Triggers and Processes

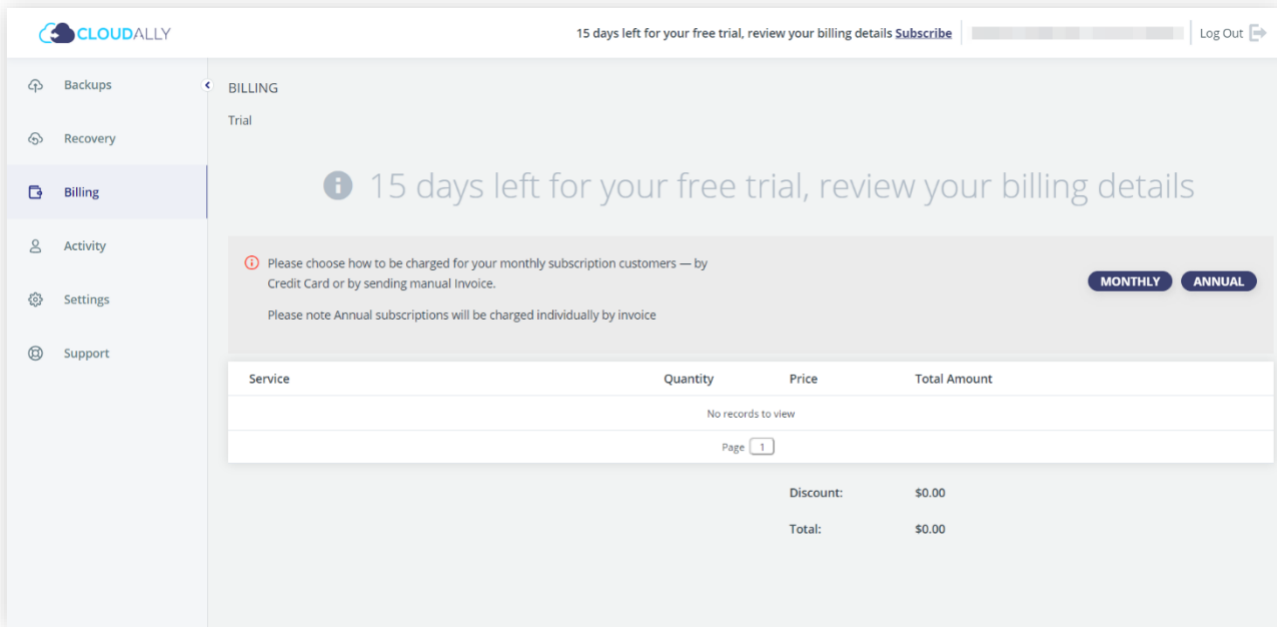
← Back Cancel **Next**

Click **Next** to create the replication task. The task will be assigned to the next available processing machine (may take several minutes). You can view the progress of the task in the Replicates tab of the backup page.

Manage Payments and Subscriptions

Once the trial period has ended, you need to subscribe to the CloudAlly services to access and manage your backups. To subscribe to a plan, perform the following procedure:

1. Click the **Subscribe** link displayed in your account. Alternatively, you can click the **Billing** option of the menu.

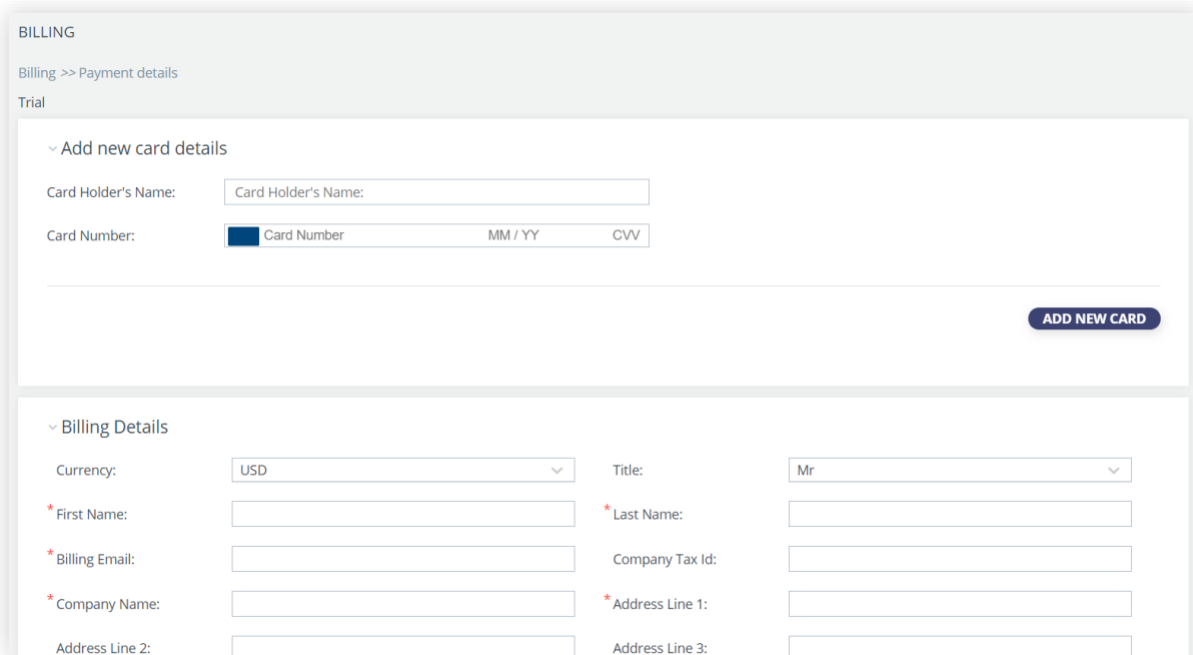


The screenshot shows the CloudAlly user interface. At the top, a notification bar states "15 days left for your free trial, review your billing details" with a "Subscribe" link and a progress indicator. The left sidebar contains navigation options: Backups, Recovery, Billing (selected), Activity, Settings, and Support. The main content area is titled "BILLING" and "Trial". It features a large informational message: "15 days left for your free trial, review your billing details". Below this, a message prompts the user to choose a billing method: "Please choose how to be charged for your monthly subscription customers — by Credit Card or by sending manual invoice." There are two buttons: "MONTHLY" and "ANNUAL". A note states: "Please note Annual subscriptions will be charged individually by invoice". A table with columns "Service", "Quantity", "Price", and "Total Amount" is shown, but it is empty with the text "No records to view" and "Page 1". At the bottom right, a summary shows "Discount: \$0.00" and "Total: \$0.00".

2. The *Review Billing* page is displayed with the option to select either **MONTHLY** or **ANNUAL** billing options.

Note: You can subscribe before the end of the trial period, the payment period in starts after the trial period is over.

3. Click **MONTHLY** or **ANNUAL**, depending on your requirement.



The screenshot shows the 'BILLING' section of the CloudAlly interface. It includes a breadcrumb 'Billing >> Payment details' and a 'Trial' status. The 'Add new card details' section contains input fields for 'Card Holder's Name', 'Card Number' (with MM/YY and CVV sub-fields), and an 'ADD NEW CARD' button. The 'Billing Details' section includes dropdowns for 'Currency' (USD) and 'Title' (Mr), and input fields for 'First Name', 'Last Name', 'Billing Email', 'Company Tax Id', 'Company Name', 'Address Line 1', 'Address Line 2', and 'Address Line 3'.




4. You are redirected to the **Payment Details** page. Fill-in the credit card details to finish the subscription process. Please refer to the section dedicated to the Payment details page for more information.
 - **Monthly Subscription:** CloudAlly's billing is handled by a PCI compliant payment processor. To finalize your subscription, enter your card details and general billing information and then click "Subscribe". The initial payment will be charged at the end of your 2-week trial period. A payment receipt will be emailed to you after each monthly charge is taken.
 - **Annual Subscription:** You will receive a confirmation message that your request has been submitted. You will then receive an email from support asking that you confirm your annual subscription request. Once confirmed CloudAlly will email an invoice to you payable in 30 days by credit card, PayPal or bank transfer.

Note: The monthly payments are processed automatically once you provide the required information in the Billing details section and your credit card is valid. You can disable the automatic payment processing – please contact our support team in order to handle the matter. If you do so, you will start receiving monthly invoices for the payments.

After subscription the **Billing** page displays additional billing management options and gives a brief summary of the payment result for the current payment period and the next payment date:

BILLING

Monthly subscription, Next payment: Jan 15th 2020

<p>Status</p>  <p>Billing status of clients</p>	<p>History</p>  <p></p>	<p>Payment Details</p>  <p>Change your payment details</p>
---	---	--

Payment Details

The **Payment Details** page contains the information used for billing. You can update the credit card details and the billing details in the two sections of the page:

BILLING

Billing >> Payment details

Monthly subscription, Next payment: Dec 6th 2019

▼ Credit Card Details

Card Number:

▼ Billing Details

Currency: <input type="text"/>	Title: <input type="text"/>
* First Name: <input type="text"/>	* Last Name: <input type="text"/>
* Billing Email: <input type="text"/>	Company Tax Id: <input type="text"/>
* Company Name: <input type="text"/>	* Address Line 1: <input type="text"/>

Add New Card

The **Add New Card** option enables you to define your card information for subscription payment. Perform the following procedure to create a new payment method:

BILLING

Billing >> Payment details

Monthly subscription, Next payment: Dec 6th 2019

▼ Credit Card Details

Card Number:

▼ Add new card details

Card Holder's Name:

Card Number:

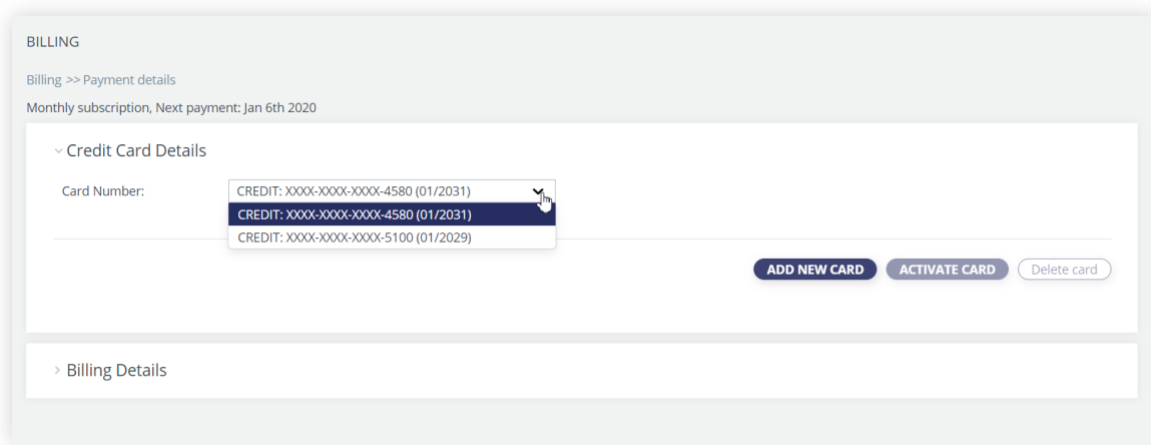
1. Under the Cards field, select **ADD NEW CARD** option.
2. Enter the card details such as Card Number, CVV, Card holder's name, and card expiry date.
3. Click **ADD NEW CARD** button.

The new card information is saved. You can use this card after activating the same.

Update Billing Details

You can switch the payment method used in the billing process. To change your existing payment method, perform the following procedure:

1. Click the drop-down list and select the payment method from the **Cards Number** drop down list.
2. Click the payment method from the list (the screenshot below depicts choosing a different credit card).
3. Click **ACTIVATE CARD** to set the selected card as the preferred payment method.



The **Billing details** section displays the billing information such as Currency, Title, Name, Billing Email, etc.

4. Scroll down for more fields of the Billing details section. In the Company Tax ID field indicates your company tax ID. It's mandatory for Israeli companies.

Due to Value-added tax (VAT) Israel companies must include their Tax Id. Therefore the field Company Tax Id is mandatory for Israel and without the filled out field our company will not be able to provide the services.

▼ Billing Details

Currency:	<input type="text"/>	Title:	<input type="text"/>
* First Name:	<input type="text"/>	* Last Name:	<input type="text"/>
* Billing Email:	<input type="text"/>	Company Tax Id:	<input type="text"/>
* Company Name:	<input type="text"/>	* Address Line 1:	<input type="text"/>
Address Line 2:	<input type="text"/>	Address Line 3:	<input type="text"/>
* Country:	<input type="text"/>	* City:	<input type="text"/>
* Zip Code/Postal Code:	<input type="text"/>	* Phone number:	<input type="text"/>

Email Invoice/Receipt: Link Attachment

UPDATE BILLING DETAILS

5. Edit/update the required fields. Please note that the fields marked with the * symbol are mandatory.
6. Click the UPDATE BILLING DETAILS button.
7. The updates are saved.

At the bottom of the page you can choose whether you want to receive the Invoices/Receipts as a link or as an attachment to the email.

Note: You can change the billing currency by contacting our support team.

Status

This page displays the Next payment forecast for the upcoming payment date. The details include Service name, Quantity, Price, and the Total amount.

BILLING

Billing >> Status

Monthly subscription, Next payment: Jan 15th 2020

Payment forecast: \$83.00, Due on Jan 15th 2020

Service	Quantity	Unit Price	Total Amount
Salesforce (1 ())	5 seats	\$3.00	\$15.00
Salesforce (14 ())	14 seats	\$3.00	\$42.00
Salesforce (2 ())	2 seats	\$3.00	\$6.00
Salesforce (3 ())	3 seats	\$3.00	\$9.00
Salesforce (Demo Salesforce Backup December 2019)	3 seats	\$3.00	\$9.00
Dropbox (11.44 MB)	11.44 MB	\$2.00	\$2.00

Page 1 of 1 Showing 1-6 of 6

Total: \$83.00





History

This page displays the history of payments.

BILLING

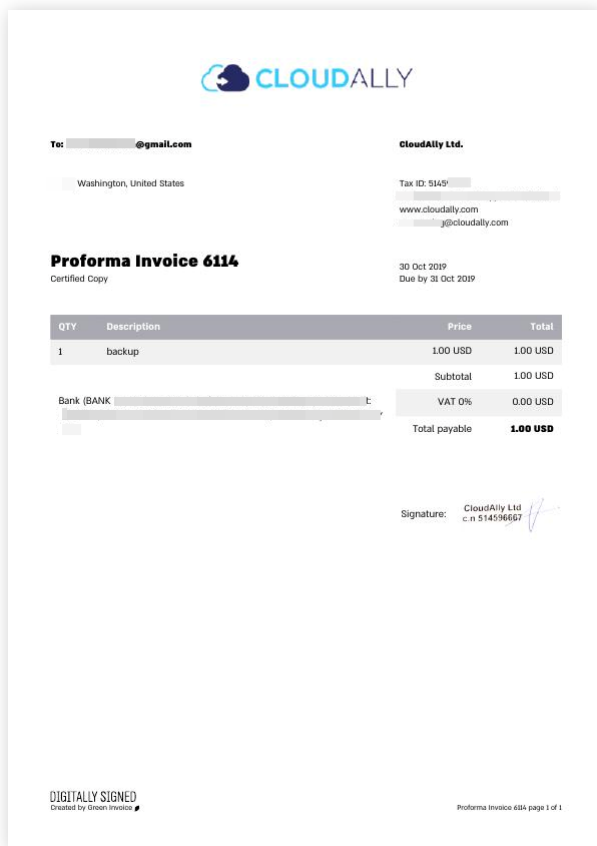
Billing >> History

Monthly subscription, Next payment: Jan 15th 2020

Reference Number	Issue Date	Due Date	Amount
63025 	September 15, 2019	September 15, 2019	\$75.00
62830 	August 15, 2019	August 15, 2019	\$72.00
62524 	July 15, 2019	July 15, 2019	\$68.00
62182 	June 15, 2019	June 15, 2019	\$23.00

Page 1 of 1 Showing 1-4 of 4

By clicking on the invoice number, you can download the invoice file. An example of an invoice/receipt is displayed below:



CLOUDALLY


To: [redacted]@gmail.com
Washington, United States

CloudAlly Ltd.
Tax ID: 5145/
www.cloudally.com
jg@cloudally.com

Proforma Invoice 6114
Certified Copy

30 Oct 2019
Due by 31 Oct 2019

QTY	Description	Price	Total
1	backup	1.00 USD	1.00 USD
		Subtotal	1.00 USD
Bank (BANK [redacted])		VAT 0%	0.00 USD
		Total payable	1.00 USD

Signature: CloudAlly Ltd
c:n 514596667 

DIGITALLY SIGNED
Created by Open Invoice

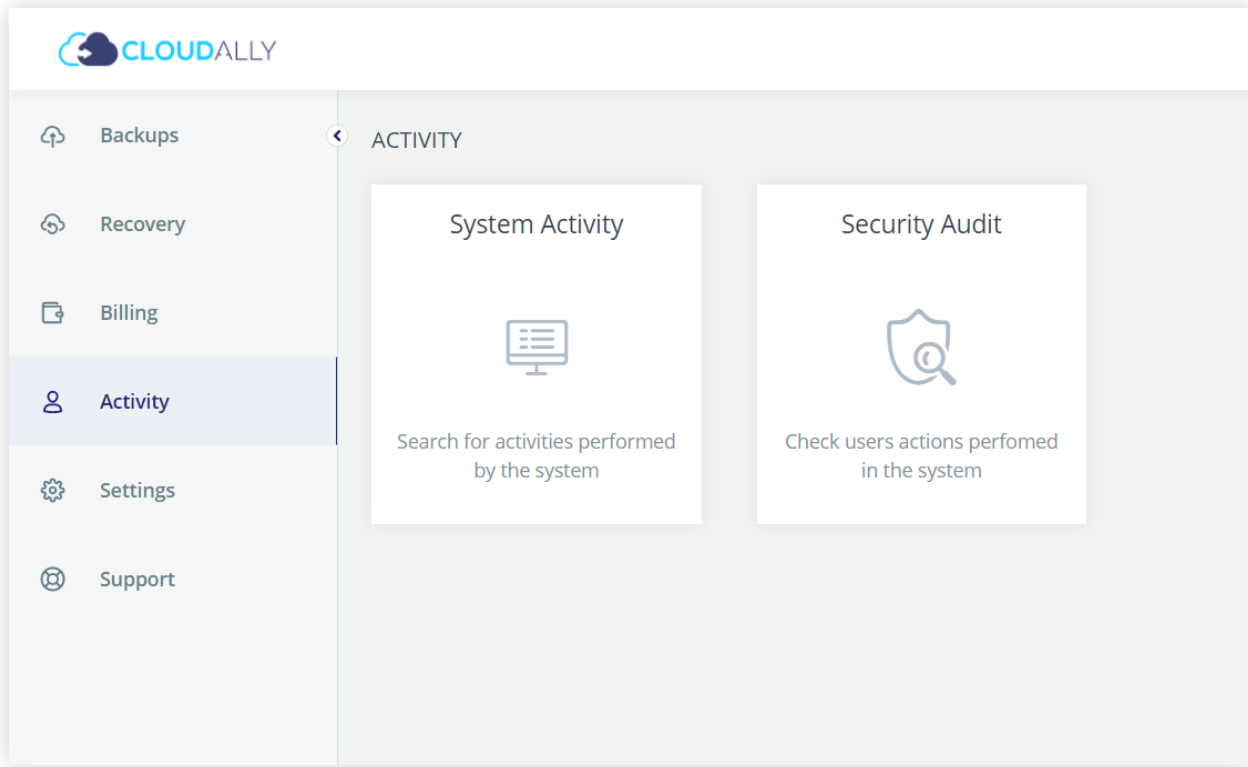
Proforma Invoice 6114 page 1 of 1

Please note that the invoice/receipt above is given only as an example and is issued for an account using other backup solution. The invoice provides details on the number of backed up accounts or the amount of stored data, the price per unit, and the total amount paid. It also displays the payment method used.

Manage Your CloudAlly Account

This section guides you through the processes of managing your CloudAlly account activity, account settings, password, setting up two-factor authentication, and manage users.

View the Account Activity



The Activity section enables you to view your CloudAlly account activity including System Activity and Security Audit. You can access this section by clicking the Activity element from the navigation pane.

System Activity

The **System Activity** page displays your account activity with the details such as Date, Activity, Service, Account, and Description.

ACTIVITY

Activity >> System activity

Show: From: To: User Activity: All Status: All

Date	User Activity	Service	Status	Task	Item
Dec 18 2019 06:03 AM	Backup	Salesforce	Completed		<input type="button" value="i"/>
Dec 17 2019 08:11 PM	Notification	Salesforce	Completed		<input type="button" value="i"/>
Dec 17 2019 06:41 PM	Restore	Salesforce	Completed		<input type="button" value="i"/>
Dec 17 2019 06:41 PM	Notification	Salesforce	Completed		<input type="button" value="i"/>
Dec 17 2019 10:31 AM	Notification	Salesforce	Completed		<input type="button" value="i"/>
Dec 17 2019 09:48 AM	Backup	Salesforce	Completed		<input type="button" value="i"/>
Dec 17 2019 09:47 AM	Notification	Salesforce	Completed		<input type="button" value="i"/>
Dec 17 2019 09:39 AM	Backup	Salesforce	Completed		<input type="button" value="i"/>
Dec 17 2019 09:39 AM	Notification	Salesforce	Completed		<input type="button" value="i"/>
Dec 17 2019 09:34 AM	Notification	Salesforce	Completed		<input type="button" value="i"/>
Dec 17 2019 09:23 AM	Notification	Salesforce	Completed		<input type="button" value="i"/>
Dec 16 2019 09:58 PM	Backup	Salesforce	Cancelled		<input type="button" value="i"/>

This page provides you the means to filter and search the list of backup tasks, export the list as a .csv file and to view more details on any backup task. The latter can be achieved by clicking the button. The Info pop-up displays the backup execution time, the size of the stored data and the number of entities and the summary of the backup execution:

Info ×

EXECUTION TIME: Dec 18 2019 04:24 PM

PERFORMED BY: [redacted]@cloudally.com

DESCRIPTION: Download Task for seat [redacted]@gmail.com has been scheduled.













Security Audit

The **Security Audit** page provides information about all the security related actions that have happened in your CloudAlly account. The actions that are displayed are the Sign-ins, password changes, failed sign-ins, etc. The information includes the date of the event, the type of activity, the status of the activity, the account performing the activity and the description.

ACTIVITY

Activity >> Security audit

Show: From: To: User Activity: Status:

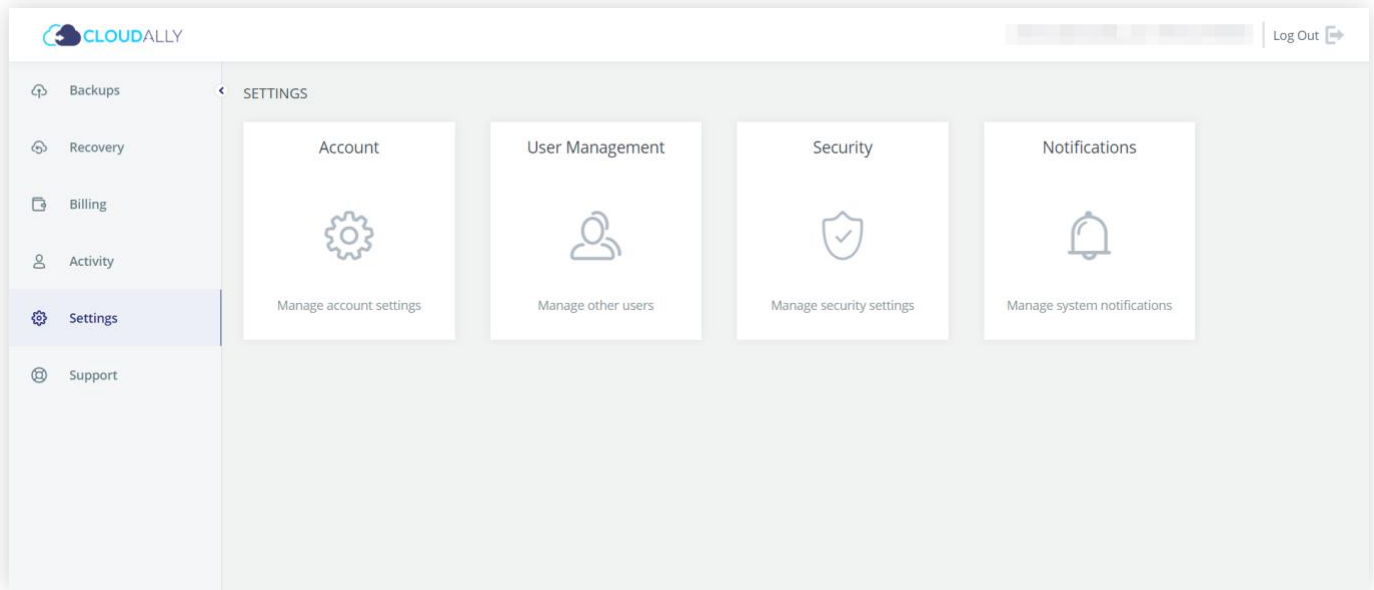
Date	User Activity	Status	Performed By	Description
Dec 18 2019 01:27 PM	Sign-in	Completed	 @cloudally.com	Native Sign In (OK) Chrome from ip 84.39.24...
Dec 18 2019 11:43 AM	Sign-in	Completed	 @cloudally.com	Native Sign In (OK) Chrome from ip 85.140.2...
Dec 18 2019 11:15 AM	Sign-in	Completed	 @cloudally.com	Native Sign In (OK) Chrome from ip 54.86.23...
Dec 18 2019 10:46 AM	Sign-in	Completed	 @cloudally.com	Native Sign In (OK) Chrome from ip 85.140.2...
Dec 17 2019 11:57 AM	Sign-in	Completed	 @cloudally.com	Native Sign In (OK) Chrome from ip 216.72.4...
Dec 17 2019 10:41 AM	Sign-in	Completed	 @cloudally.com	Native Sign In (OK) Chrome from ip 54.86.23...
Dec 16 2019 04:29 PM	Sign-in	Completed	 @cloudally.com	Native Sign In (OK) Chrome from ip 84.39.24...
Dec 16 2019 02:26 PM	Sign-in	Completed	 @cloudally.com	Native Sign In (OK) Chrome from ip 54.86.23...
Dec 16 2019 12:04 PM	Sign-in	Completed	 @cloudally.com	Native Sign In (OK) Chrome from ip 54.86.23...
Dec 16 2019 10:39 AM	Sign-in	Completed	 @cloudally.com	Native Sign In (OK) Chrome from ip 84.39.24...
Dec 16 2019 09:59 AM	Sign-in	Completed	 @cloudally.com	Native Sign In (OK) Firefox from ip 176.52.7.1...
Dec 15 2019 07:38 PM	Sign-in	Completed	 @cloudally.com	Native Sign In (OK) Chrome from ip 46.117.7...

The Security audit table can be exported as a CSV file by clicking the **Export** button.

Manage Your CloudAlly Settings

The Settings page provides you with tools to control your CloudAlly account and accounts of the users in your account. The Settings section consists of 4 sub-sections:

- Account
- User Management
- Security
- Notifications



You can find more details on each of the Settings pages below.

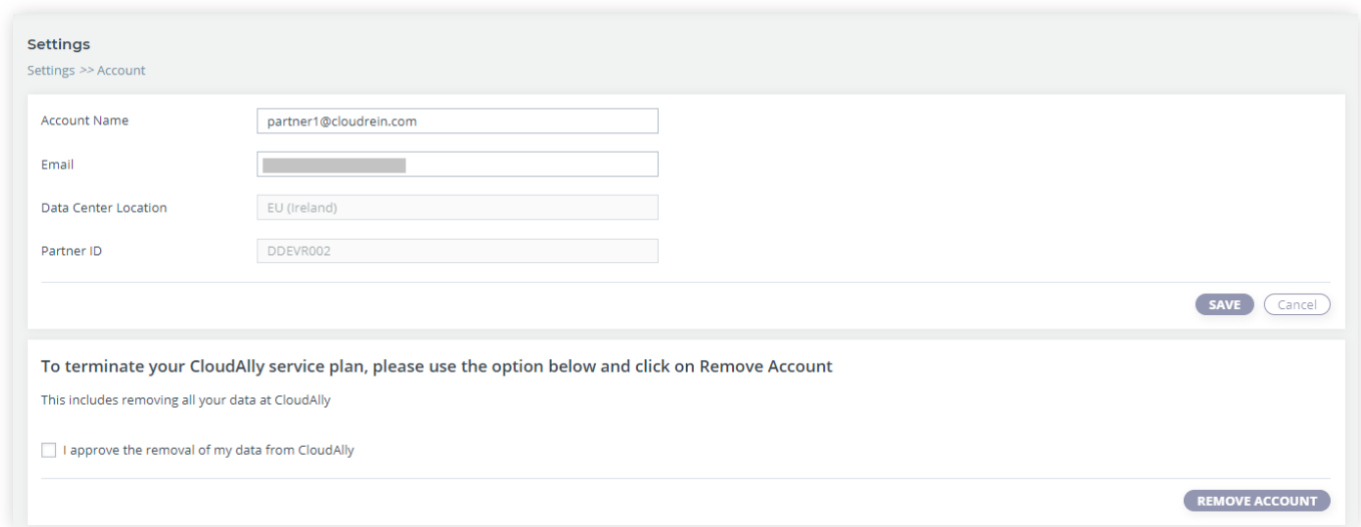
Account settings

This page allows you to change the name of your account and the email address. You can also change the Data Center Location by contacting our support team. Finally, this page also allows you to terminate your CloudAlly account. Please note that if you terminate your CloudAlly account, the data from all your backups will be deleted.

To update/change your CloudAlly account details, perform the following procedure:

1. Click the **Settings** → **Account** element from the Navigation Panel of the CloudAlly web application.

The account settings page is displayed.



The screenshot shows the 'Settings' page with the 'Account' sub-section. It contains four input fields: 'Account Name' (with the value 'partner1@cloudrein.com'), 'Email' (blurred), 'Data Center Location' (with the value 'EU (Ireland)'), and 'Partner ID' (with the value 'DDEV002'). There are 'SAVE' and 'Cancel' buttons at the bottom right. Below the form, there is a section titled 'To terminate your CloudAlly service plan, please use the option below and click on Remove Account'. It includes a warning: 'This includes removing all your data at CloudAlly' and a checkbox labeled 'I approve the removal of my data from CloudAlly'. A 'REMOVE ACCOUNT' button is located at the bottom right of this section.

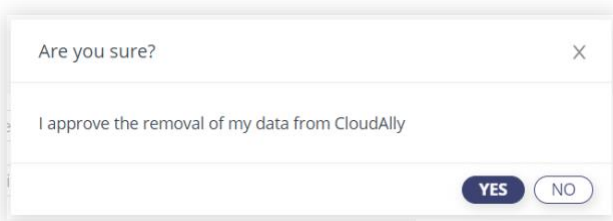
2. Update the **E-mail** and/or **Display Name**.
3. Click the **Submit** button to save the details.

Canceling Your CloudAlly Service Plan

To cancel your CloudAlly service plan, perform the following procedure:

1. Select the check box adjacent to the I approve the removal of my data from CloudAlly field and click Remove Account button.

The “Are you sure?” pop-up window is displayed with a confirmation request.



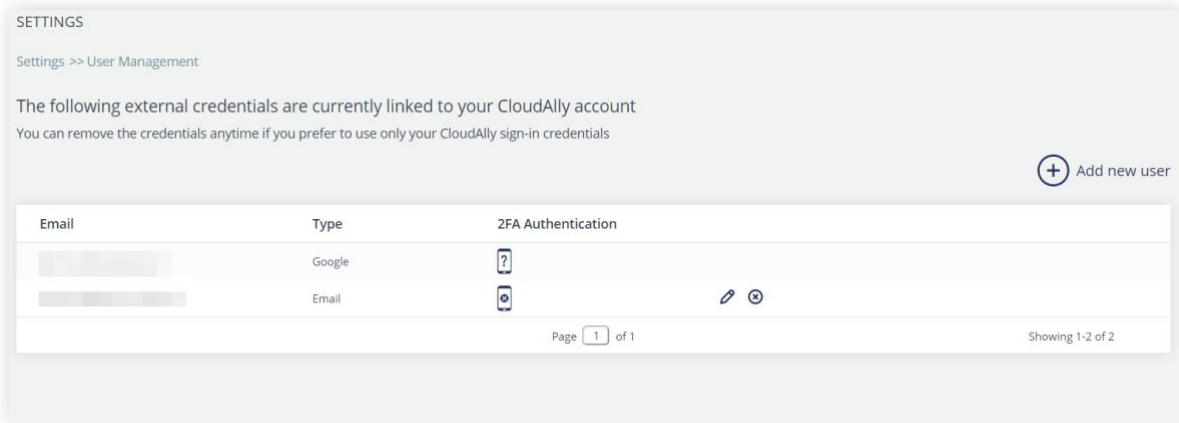
The screenshot shows a confirmation dialog box titled 'Are you sure?' with a close button (X) in the top right corner. The text inside the dialog reads 'I approve the removal of my data from CloudAlly'. At the bottom, there are two buttons: 'YES' and 'NO'.


2. Click **YES** button to confirm the cancellation.

User Management

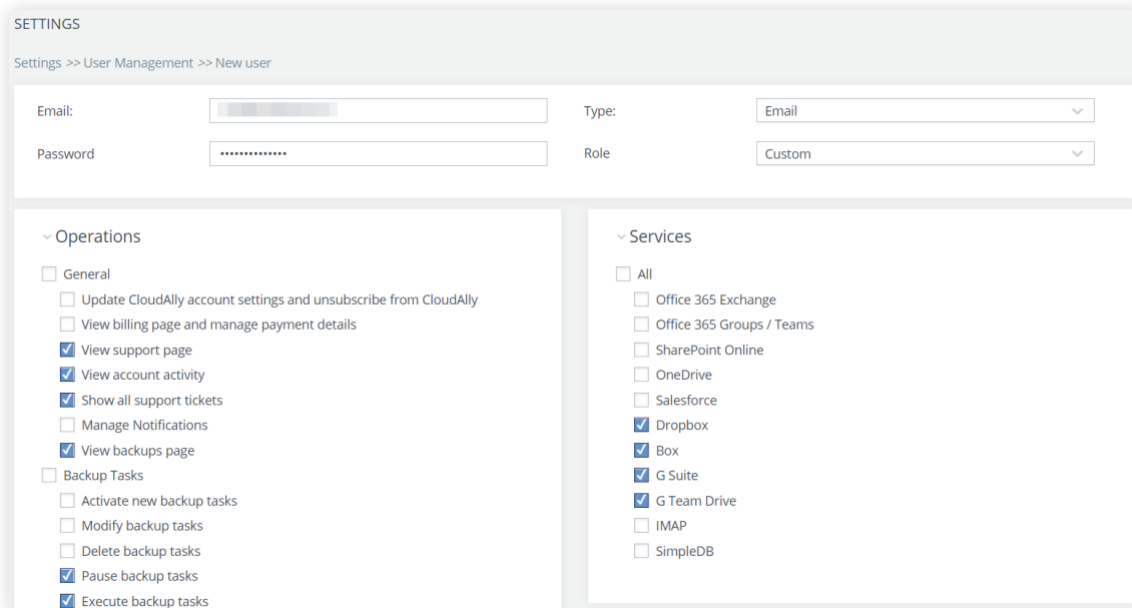
You can access the user management options by clicking the **Settings → User management** element from the Navigation Panel of the CloudAlly web application.

The page provides tools for fine-level control of the permissions and access levels of your users.



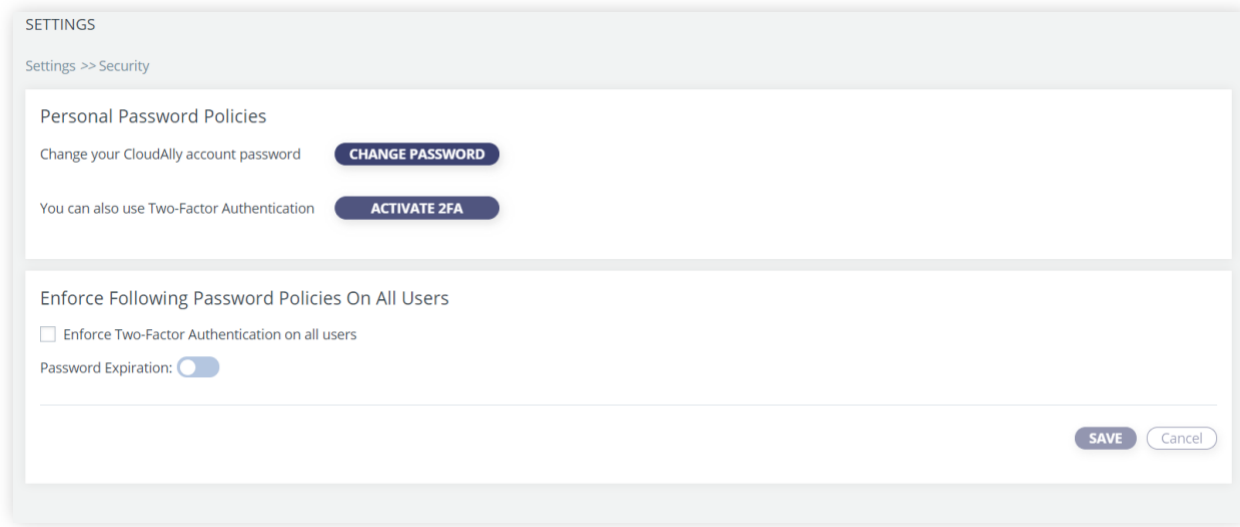
Please use the button **+ Add new user**, to create a new user and start the configuration procedure for that user, or the  button in order to edit an existing user's settings. The settings include the operations permitted to the user and the list of available services:

In order to save the changes please scroll to the bottom of the page and click the **SAVE** button.



Note: Please note that selecting the role “Administrator” enables all services and operations.

Security Settings



SETTINGS

Settings >> Security

Personal Password Policies

Change your CloudAlly account password **CHANGE PASSWORD**

You can also use Two-Factor Authentication **ACTIVATE 2FA**

Enforce Following Password Policies On All Users

Enforce Two-Factor Authentication on all users

Password Expiration:

SAVE Cancel

The **Security** settings page provides the means to update your password or set up two-factor authentication.

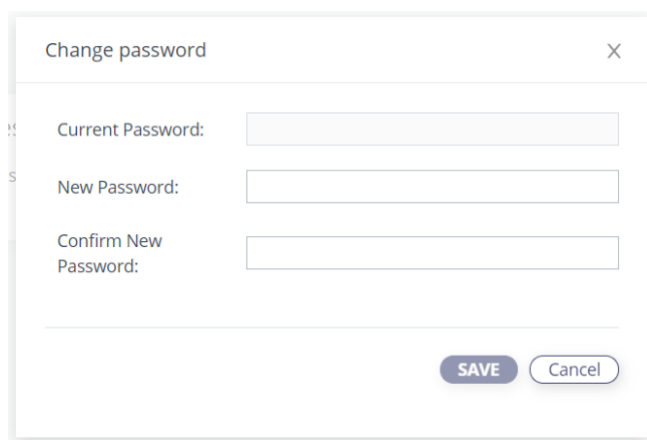
The bottom section allows you to enforce certain security policies for your users' accounts. With the **Enforce Two-Factor Authentication** option you can make the two-factor authentication mandatory for all the users in your account. By setting the **Password Expiration**, you can enable the password expiration option for all your users – you will be also be asked for the number of days before the users' passwords expire.

Changing your CloudAlly password for credential-based authorization

You can change your existing account password by performing the following procedure:

1. Click the **Settings → Security** element from the Navigation Panel of the CloudAlly web application.
2. Click the **CHANGE PASSWORD** button in the Personal Password Policies panel.

The *Change password* pop-up is displayed.



Change password X

Current Password:

New Password:

Confirm New Password:

SAVE Cancel

3. Enter the current password in the **Current Password** field.
4. Enter the new password in the **New Password** field.

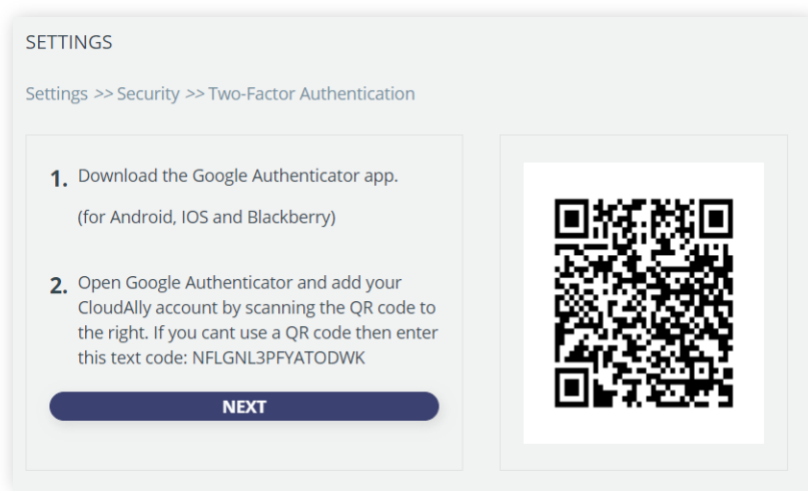
5. Reenter the new password in the **Confirm New Password** field.
6. Click **SAVE** button to save the new password. You can now use this password to access your CloudAlly account.

Two-Factor Authentication

Two-factor authentication provides additional security to your CloudAlly account and your backup data. Perform the following procedure to enable two-factor authentication:

1. Click the **Settings** → **Security** element from the Navigation Panel of the CloudAlly web application.
2. Click the **TWO-FACTOR AUTHENTICATION** element from the Navigation Panel of the CloudAlly web application.

The Two-Factor Authentication page is displayed.



3. Download the Google Authenticator app, depending on your platform (Android, iOS, and Blackberry).
4. Open Google Authenticator app and add your CloudAlly account by scanning the QR code provided in the CloudAlly web application.

If you cannot use a QR code, then enter the text code provided in the CloudAlly web application.

A six-digit code is generated.

5. Click the **NEXT** button.

Enter the 6-digit code that the application generated.

6. Click the **ENABLE** button to complete the process of activating the Two-factor authentication.

From now on, every time you sign in to your CloudAlly account, you are asked to enter a 6-digit code from your authentication app, after you click the **SIGN IN** button. Click the **VERIFY** button to verify the code and access the application.

Notifications Settings

You can access the notification settings page by clicking the **Settings → Notifications** element from the Navigation Panel of the CloudAlly web application.

This page provides a set of tools for control over the flow of the notifications. Here you can control the general settings of the notification, such as the frequency of reports (daily or weekly), their detail level (full or failures only), whether it is attached to the report email, or provided via a link.

Also, this page displays the summary of the recipients' notification settings. You can add a new recipient with the

 **Add new recipient** button or edit/delete an existing one with the   buttons.

SETTINGS

Settings >> Notifications

Summary Report


Summary Report





















Report Type: Full Report Failures Only

Provide as: CSV Attachment Download Link

Report Frequency:

SAVE

Send Notifications To:  Add new recipient

Email	Display Name	Summary Report	Recovery Notification ⓘ	Exceptions Notification ⓘ	Action
██████████	██████████	✓	✓	✓	 
██████████	██████████		✓		 
██████████	██████████	✓	✓		 
██████████	██████████		✓	✓	 
██████████	██████████	✓		✓	 
██████████	██████████	✓	✓	✓	 
██████████	██████████	✓	✓	✓	 
██████████	██████████		✓		 
██████████	██████████	✓	✓	✓	 
██████████	██████████	✓		✓	 

Setting up a new recipient is simple:

1. Click the **+ Add new recipient** button
2. Enter the **Email** of the recipient and the **Display name**. The Display name is used in the report email to address the recipient.
3. Select the required notification types.
4. Click **SAVE** button to create the new recipient or **Cancel** to discard the changes.

SETTINGS

Settings >> Notifications >> Albert DEMO

User Info

Email @

Display Name

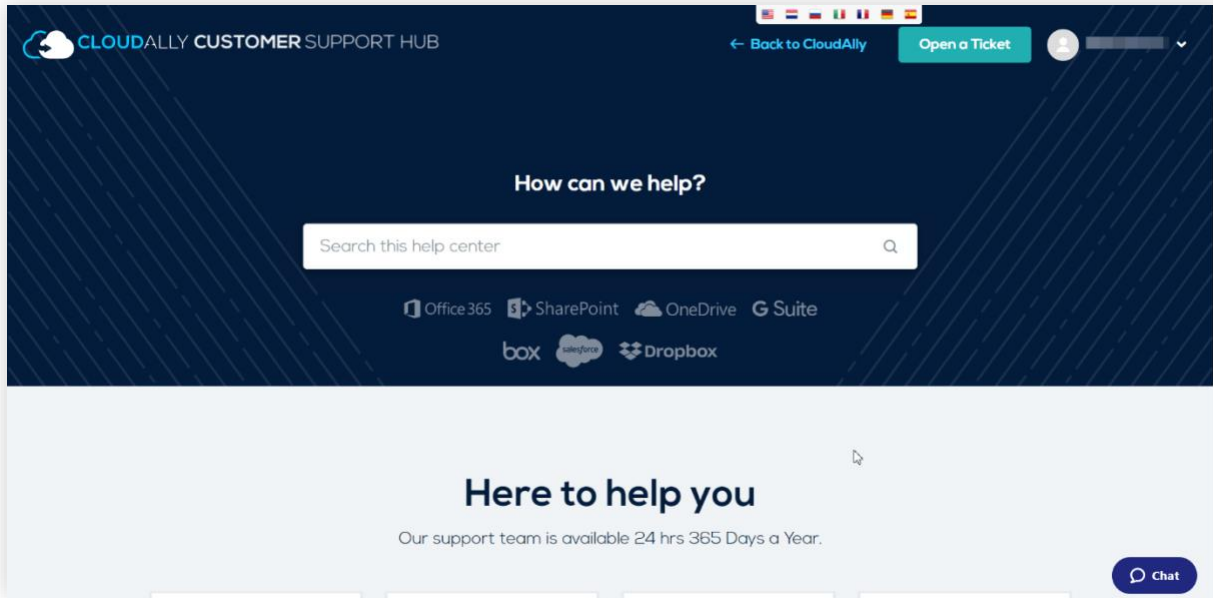
Notifications

Summary Report Recovery Notification Exceptions Notification

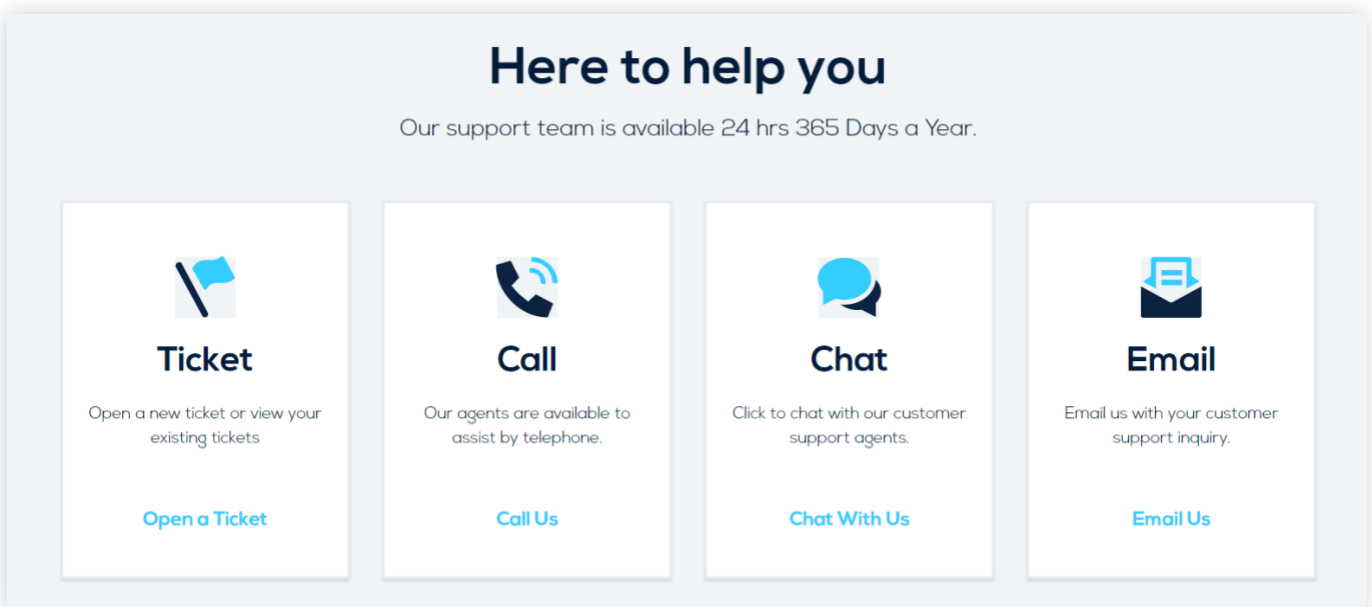
An example of a new recipient set-up screen.

Support pages

The Support button in the menu redirects you to our support hub.



In the support hub you can find articles covering some of the most common questions and providing instructions. Please feel free to contact our support engineers using a method that is the most convenient for you: via email, by phone, or in the text chat. Open a ticket and the support team will contact you to help you with any question or problem.



Browse the articles, instructions and tutorials in the Help Topics section. These materials are especially useful for new users as they explain the settings and procedures of backup activation, management and recovery.

Help Topics



Getting Started



My Account



Backup Solutions



User Guides



Videos



Copyright & Legal

Helpful Resources

About CloudAlly

Founded in 2011 as one of the world's first cloud-to-cloud backup services for Google Apps and Salesforce, CloudAlly led the industry with the first commercially available Microsoft Office 365 cloud backup in Q1 2014. ISO 27001 and HIPAA certified, CloudAlly adheres to industry standard best practices for information security management, including EU-GDPR compliance.

Knowledge Base

Search through articles in our Knowledge Base at <https://support.cloudally.com> to find answers to the most common user questions.

Support

Support - If you have any question or need further help, do not hesitate to contact us via email at support@cloudally.com. or visit our customer support hub: <https://support.cloudally.com>

Privacy

CloudAlly takes privacy seriously. Read our Privacy Policy at <https://www.cloudally.com/privacy-policy>.

Security

CloudAlly provides a secure online backup solution with internationally recognized accreditation for information security management. Read how we protect your data at <https://www.cloudally.com/cloud-backup-solutions/secure-online-backup>.

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