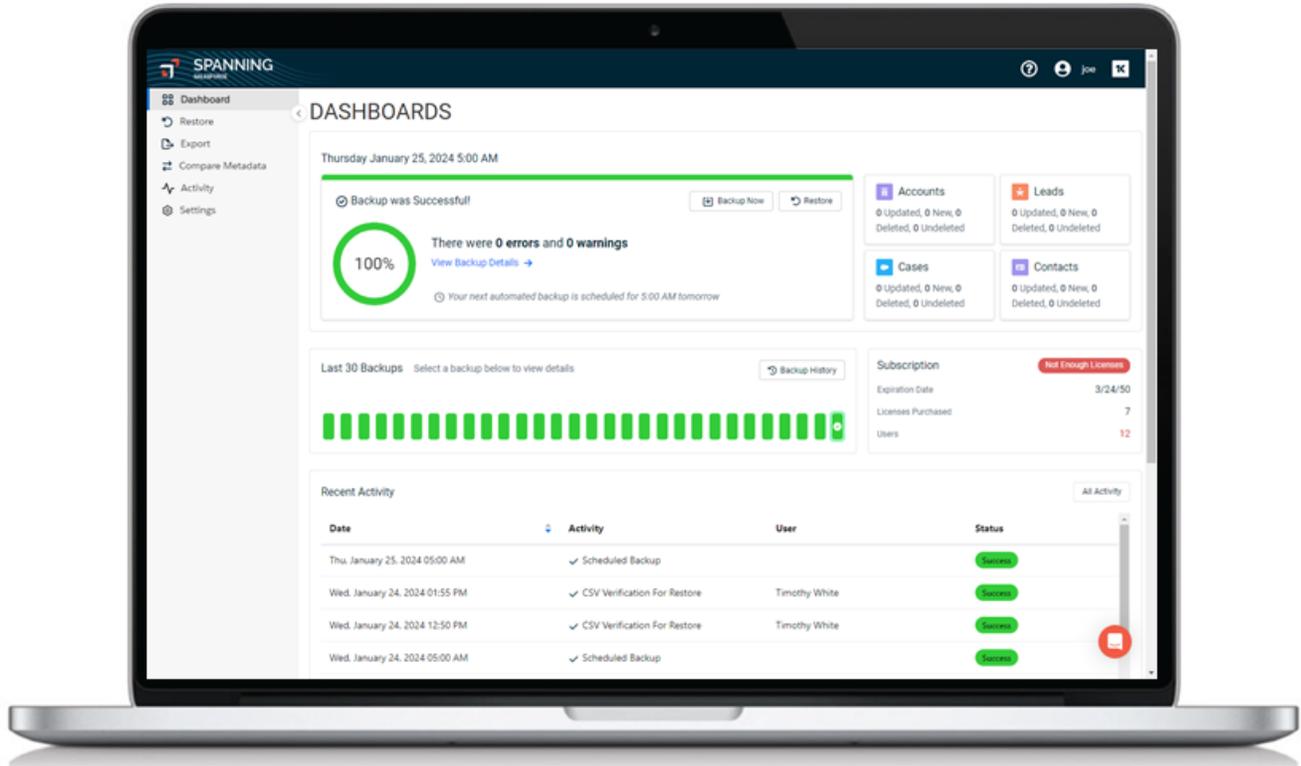


Spanning Backup for Salesforce Admin Guide

Document Date 02/17/2024



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Getting Started

Thanks for selecting Spanning Backup for Salesforce! At Spanning, our mission is to ensure your organization's data is well-protected and always available for rapid restore, keeping 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 confidence and proof that your data is backed up, safe, and ready for recovery.

Spanning strives to build real relationships with our customers and deliver exceptional service. If you ever have a question or need additional assistance please contact us at support@spanning.com or search our Knowledge Base at <https://helpdesk.kaseya.com/hc/en-gb/categories/4405594419857>.

You can access the Spanning Backup for Salesforce Installation Guide [here](#).

About this guide

This guide was written for individuals who administer Spanning Backup for Salesforce.

This guide contains information on how to use Spanning to restore data and metadata, export data from Spanning, and manage Spanning Backup for Salesforce. It is divided into functional parts intended to support you as you manage your environment.

Next steps

During installation, your Spanning Backup for Salesforce environment was configured and began running daily backups. See these topics for details on monitoring and managing Spanning Backup:

- "[Working with Backups](#)" to modify the daily automated backup schedule, run a backup on demand, check the status of recent backups, and modify the API call limit used for backups.
- "[Customizing the Dashboard](#)" to modify the object types that display on the dashboard and are used for notifications.
- "[Configuring Spanning Backup Settings](#)" to view or modify these settings: account information, notifications, user permissions, rule-based alerts, the external API key and secret, backup data deletion and anonymization, and Kaseya IT Complete features.
- "[Restoring Object Data](#)" to restore objects to the same organization or to a different Salesforce organization.
- "[Restoring Metadata](#)" to restore metadata components to the same organization or to a different Salesforce organization.
- "[Comparing Metadata](#)" to compare metadata components in the selected backup to live Salesforce data or to data in a later backup, and optionally restore components from the comparison results.
- "[Exporting Data](#)" to export backed up data to a CSV file and download it to your local machine.
- "[Viewing Application Activity](#)" to view a log of Spanning events (such as backups and restores) and drill down to run related operations.
- "[Helpful Resources](#)" for links to additional Spanning Backup for Salesforce resources.

Working with Backups

Spanning Backup for Salesforce runs an automated backup each day. As backups run, see these topics to monitor and manage these daily backups:

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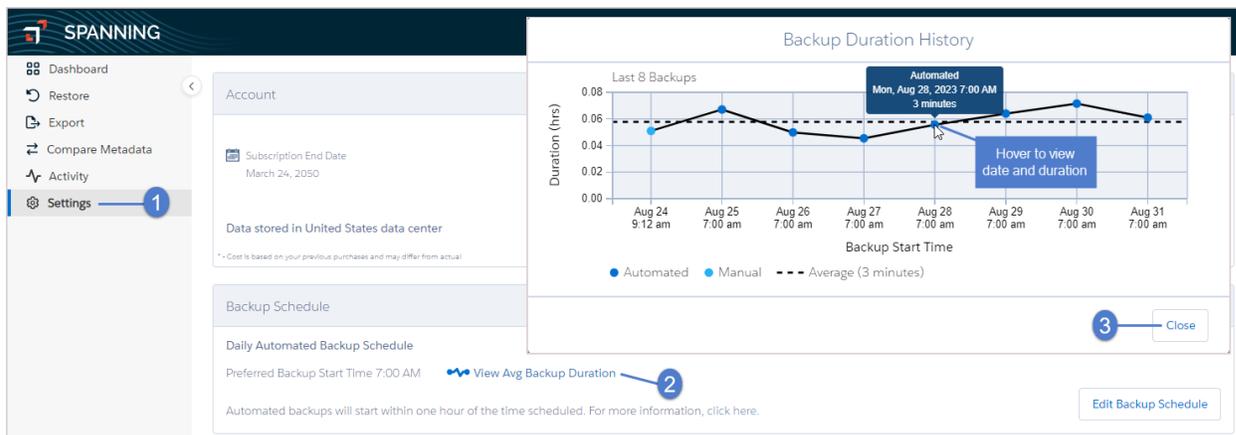
- "[Managing the automated backup schedule](#)" to view the average duration of your last 8 backups and make changes to the automated schedule if needed.
- "[Running a backup](#)" to run a manual backup on demand.
- "[Checking backup status](#)" to view the status of your last 30 backups and drill down to review and fix issues as needed.
- "[Spanning's REST API call limit](#)" to review the daily API call limit that can be used by the backup process and make adjustments if needed.

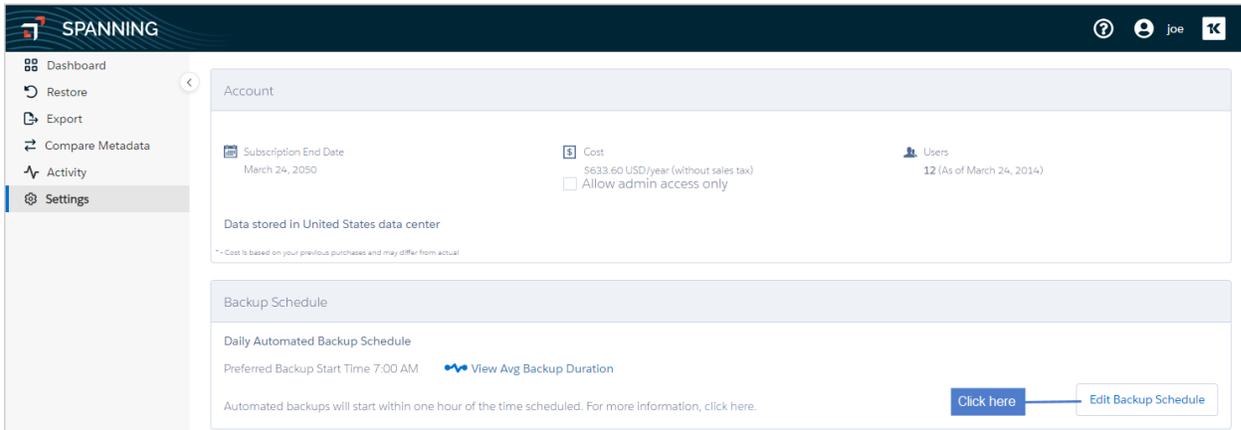
Managing the automated backup schedule

Backups run automatically at noon GMT each day. If needed, you can modify the start time of this automated schedule from the Settings page. To help you make a data-driven decision when setting a customized time for your scheduled backup, you can view a graphical chart of the time it took for your previous eight backups to complete.

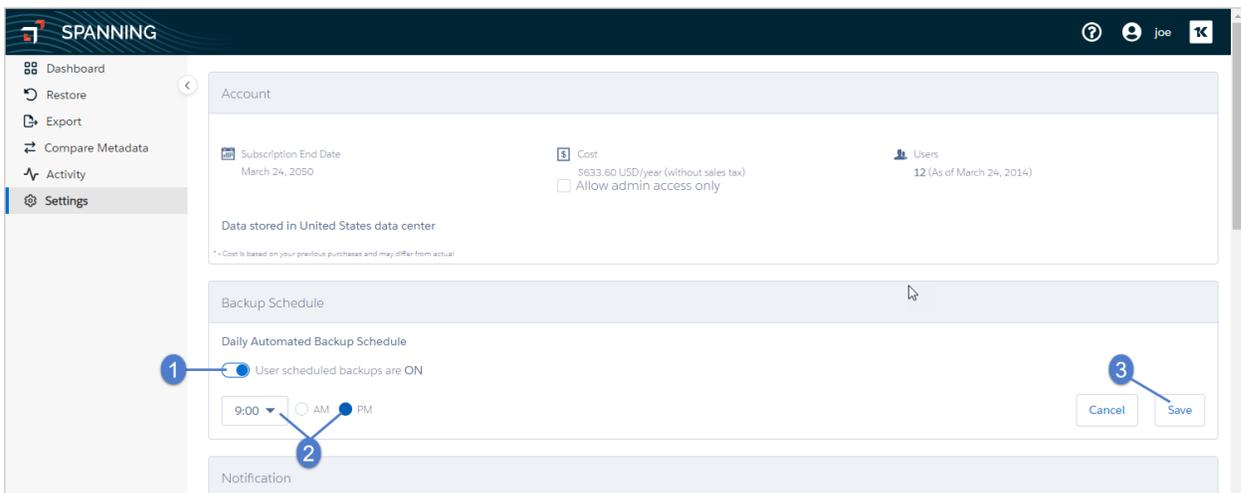
To set the start time of the daily backup schedule

1. Log into Spanning Backup for Salesforce.
2. Click **Settings**.
3. In the Backup Schedule section, click **View Avg Backup Duration** to view a graphical chart of the time it took to complete your previous eight backups:



4. Click **Edit Backup Schedule**:

5. Ensure that user scheduled backups are toggled **ON**.
6. Set the time in your local time zone for when you would like your automated backups to start.
7. Click **Save**. Scheduled backups will begin within an hour of the time you set.



Note: If you keep modifying the scheduled backup time, you may miss an automated backup. For example, if you had set the scheduled backup time for 9:00 AM, and then at 8:00 AM before the scheduled backup is about to run, you change the time to 7:00 AM, the scheduled backup will not run until 7:00 AM the next day.

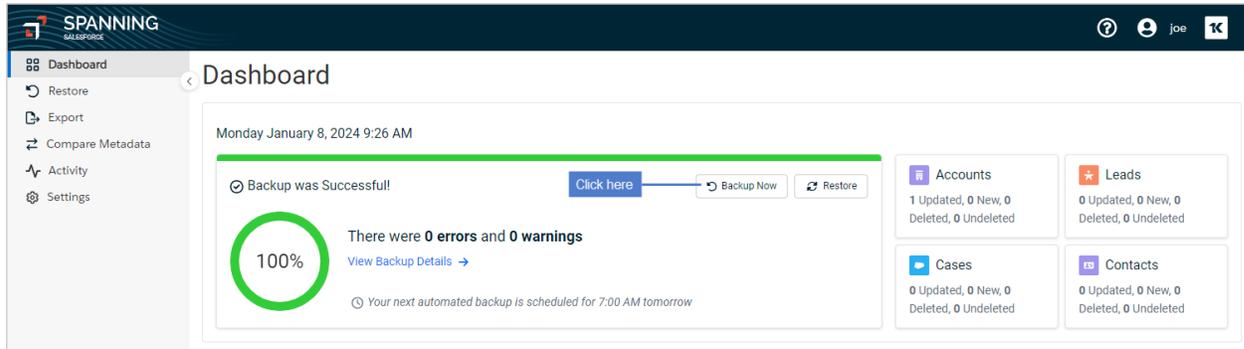
Running a backup

In addition to the daily automated backups Spanning runs to protect your data, you can run an on-demand backup whenever you like.

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To run an on-demand backup

1. Log in to Spanning Backup for Salesforce.
2. Click **Back Up Now** on the main Dashboard.



3. The backup starts and a progress bar displays:

The screenshot displays the Spanning Backup for Salesforce Admin interface. The top navigation bar includes the Spanning logo, user profile (joe), and help icons. The left sidebar contains navigation options: Dashboard, Restore, Export, Compare Metadata, Activity, and Settings.

The main content area is titled "DASHBOARDS" and shows the following information:

- Backup Status:** "Backup was Successful!" with a 100% progress indicator. It states "There were 0 errors and 0 warnings" and "Your next automated backup is scheduled for 6:00 AM tomorrow". Buttons for "Backup Now" and "Restore" are visible.
- Entity Counts:** Four cards show counts for Accounts, Leads, Cases, and Contacts. Each card displays "0 Updated, 0 New, 0 Deleted, 0 Undeleted".
- Last 30 Backups:** A horizontal bar chart showing 30 successful backup events.
- Subscription:** A card showing "Not Enough Licenses" with an expiration date of 3/24/50, 7 licenses purchased, and 12 users.
- In-Progress:** A card showing "Manual Backup TaskPriority 0 TaskPriority Records" with a "Cancel" button.

The bottom section, titled "Recent Activity", shows a table of recent actions:

Date	Activity	User	Status
Mon, January 8, 2024 09:50 AM	✓ Download Batch Output	joe.sc...@spanning...com	Success
Mon, January 8, 2024 09:26 AM	✓ Manual Backup	joe.sc...@spanning...com	Success
Mon, January 8, 2024 09:02 AM	✓ Export	...@spanning...com	Success
Mon, January 8, 2024 06:00 AM	✓ Scheduled Backup		Success

A callout box points to the "Manual Backup" row, stating "On-demand backup completed successfully".

Checking backup status

As an administrator, you can view the status of your org's backups at a glance and quickly drill down to find any problems—so you can resolve issues before they impact future restore attempts. You can also view the number of records that were updated, added, deleted, and undeleted for each backup.

Note: You may also receive backup status information via Chatter posts to your Salesforce account and status notification emails. See "[Working with notifications and alerts](#)" for details.

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See these topics for details:

- "Viewing backup status on the Dashboard"
- "Viewing backup details"
- "Viewing backup history"

Viewing backup status on the Dashboard

To monitor the status of your daily backups, simply log in to Spanning Backup for Salesforce and review the main Dashboard:

The screenshot displays the Spanning Backup for Salesforce Dashboard. The main content area shows the status of the selected backup for Monday, January 8, 2024, at 9:26 AM. A green progress indicator shows 100% completion, with a message stating "Backup was Successful!" and "There were 0 errors and 0 warnings". Below this, there are four tiles for object types: Accounts, Leads, Cases, and Contacts, each showing 0 Updated, 0 New, 0 Deleted, and 0 Undeleted records. A "Last 30 Backups" section shows a row of green bars representing backup status, with a tooltip for the most recent backup: "Friday December 22, 2023 6:00 AM, 100% complete - Backup was Successful!". A "Backup History" section on the right shows details for the selected backup, including an expiration date of 3/24/50, 7 licenses purchased, and 12 users. The left sidebar contains navigation options: Dashboard, Restore, Export, Compare Metadata, Activity, and Settings. The top navigation bar includes the Spanning logo, user profile (joe), and a notification icon.

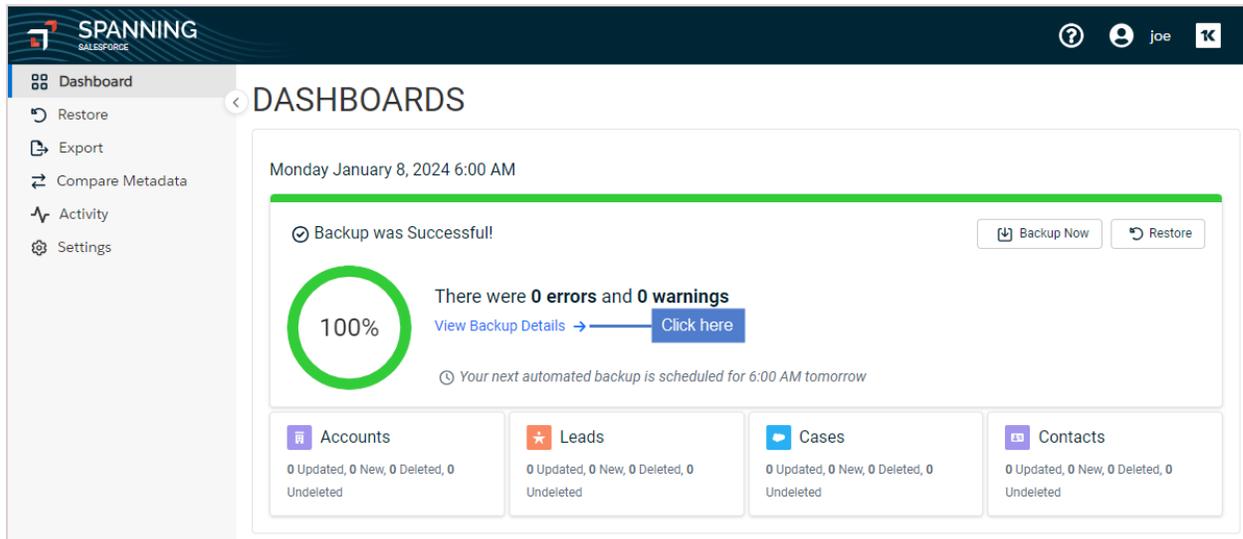
- Backup status tile – The overall status of the selected backup displays in this tile at the top of the dashboard. The most recent backup displays by default, but you can view details about another backup by clicking its  icon in the Last 30 Backups tile below.
 - **100%** indicates that all of your Salesforce data was backed up successfully. If you see any number less than 100%, click **View Backup Details** to learn more about any errors that may have occurred (see "Viewing backup details" below).
 - Changed record counts for your default object types display below (e.g., the number of records that have been updated, added, deleted, and undeleted in this backup). The default object types are Accounts, Contacts, Leads, and Opportunities, but these can be changed by running this procedure: "To change the object types displayed on the Dashboard".

- Last 30 Backups tile – This tile displays backup status icons for the last 30 backups.
 - Green indicates that the backup completed successfully with no errors.
 - Gray indicates that there were errors.
 - Hover over an icon to learn more about the backup.
 - Click an icon to display its backup status details in the tile above.
 - Click **Backup History** to view recent history on the Activity page (see "[Viewing backup history](#)" below).

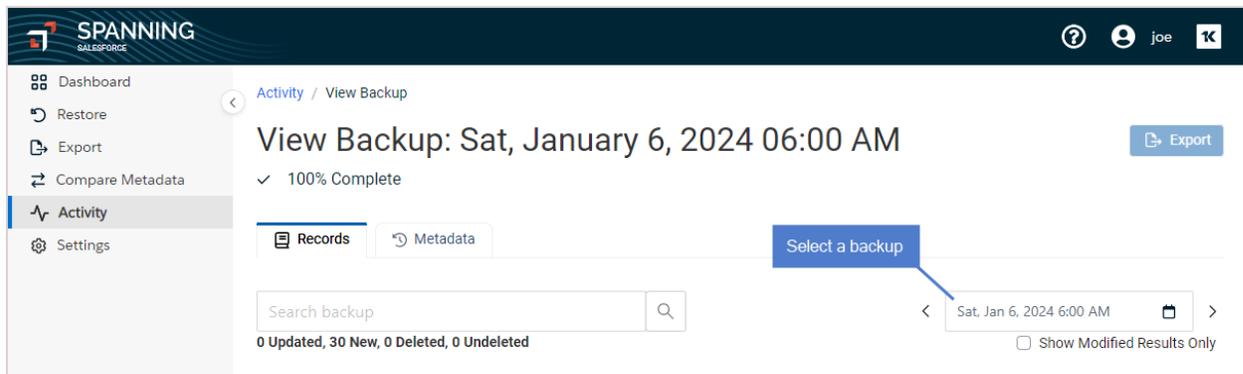
Viewing backup details

To view backup details:

1. Log in to Spanning Backup for Salesforce.
2. On the Dashboard, click **View Backup Details**.



3. On the Activity > View Backup page, select the backup date.



4. The Records tab lists all objects in the backup. You can use these options while viewing the objects:
 - To filter the object list, enter text in the **Search backup** field or check the **Show Modified Results Only** box.

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The screenshot shows the 'View Backup' interface for Saturday, January 6, 2024, at 06:00 AM. The page is 100% complete. A search bar is present with the text '(Optional) Enter search text'. A date selector shows 'Sat, Jan 6, 2024 6:00 AM' with an 'Optional' label and a 'Show Modified Results Only' checkbox checked. The table below shows the following data:

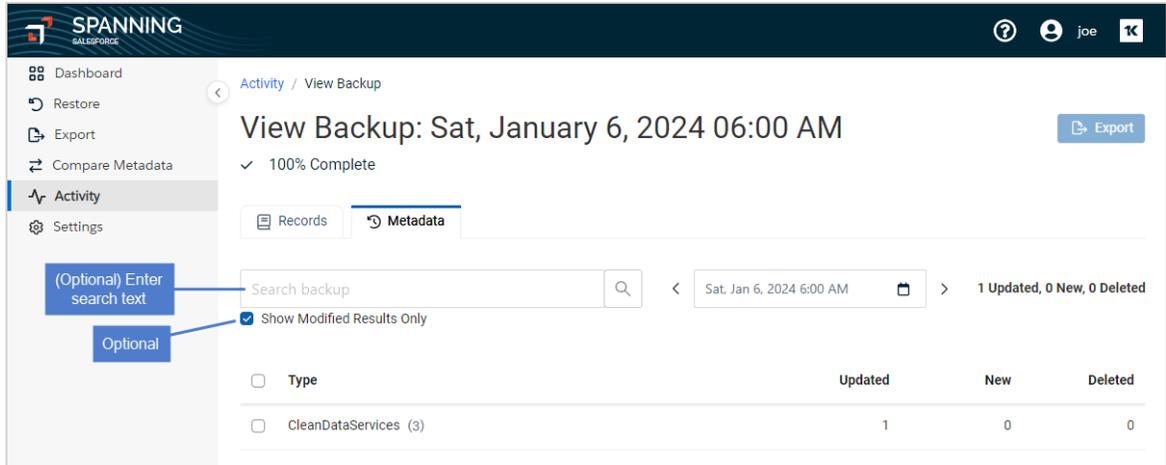
Type	Updated	New	Deleted	Undeleted
LoginGeo (27,739)*	0	11	0	0
FeedItem (18,235)	0	6	0	0
UserFeed (13,434)*	0	6	0	0
LightningUsageByBrowserMetrics (5,160)*	0	2	0	0
LightningUsageByPageMetrics (4,798)*	0	2	0	0
VisualforceAccessMetrics (2,134)*	0	1	0	0
LightningUsageByFlexiPageMetrics (1,448)	0	1	0	0

- To view a graph of the number of records that were updated, deleted, created, or undeleted over the last 8 backups, click the object's  icon. Hover over a point in the graph for details. You can also modify the From and Through dates to view the changes over an entire month.

The screenshot shows the 'View Backup' interface for Saturday, January 6, 2024, at 06:00 AM. The backup is 100% complete. The interface includes a sidebar with navigation options (Dashboard, Restore, Export, Compare Metadata, Activity, Settings) and a main content area with tabs for 'Records' and 'Metadata'. A search bar and a 'Show Modified Results Only' checkbox are present. A table lists backup components, with 'LoginGeo (27,739)*' showing 0 Updated, 11 New, 0 Deleted, and 0 Undeleted records. A 'Backup Count History' graph is overlaid, showing record counts for 'Updated', 'New', 'Deleted', and 'Undeleted' records over time. A callout box on the graph highlights 'Automated Sat, Jan 6, 2024 6:00 AM' with '11 Records New'. A table on the right shows the breakdown of records for 'LoginGeo (27,739)*'.

Type	Updated	New	Deleted	Undeleted
<input type="checkbox"/> LoginGeo (27,739)*	0	11	0	0

- To export objects to a CSV file, check boxes to select objects, then click **Export** (for details see "[Exporting Data](#)").
5. The Metadata tab lists all metadata components in the backup. You can use these options while viewing the components:
- To filter the component list, enter text in the **Search backup** field or check the **Show Modified Results Only** box.

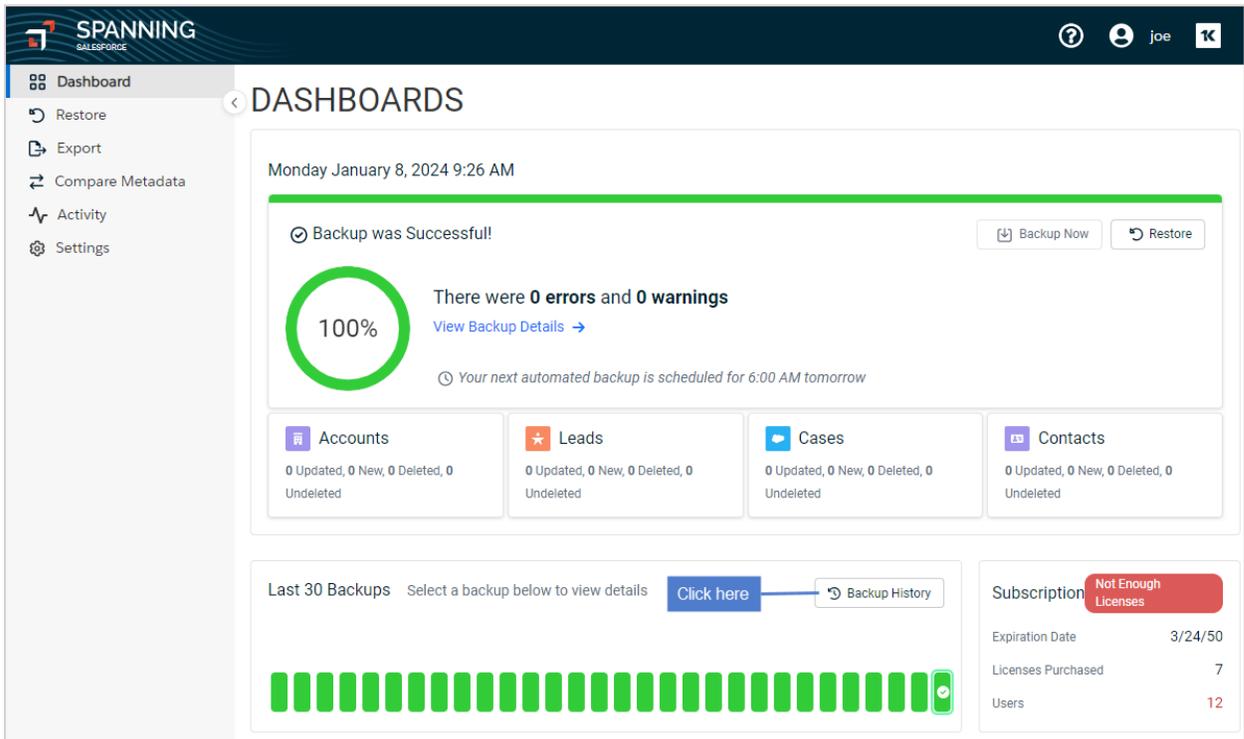


- To export components to a CSV file, check boxes to select objects, then click **Export** (for details see "Exporting Data").

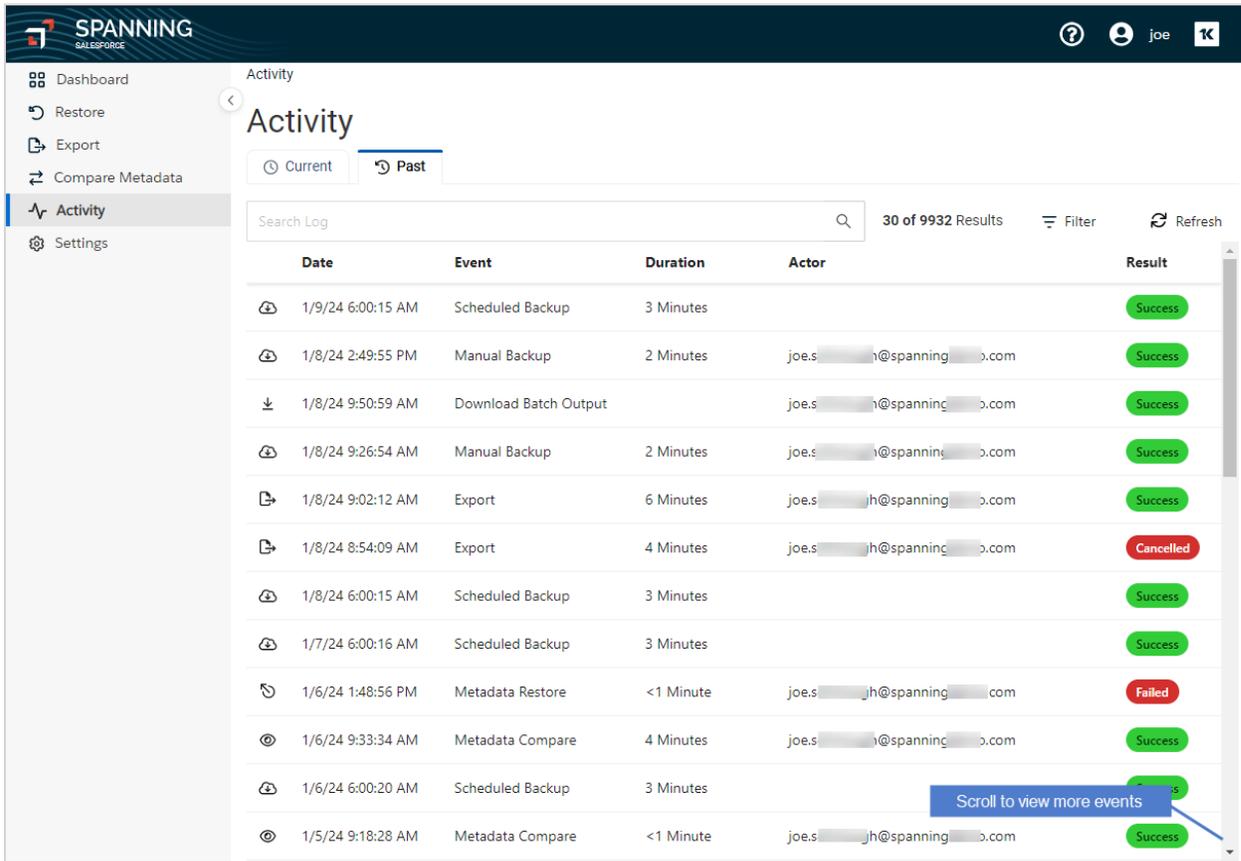
Viewing backup history

To view backup history:

1. Log in to Spanning Backup for Salesforce.
2. On the Dashboard, click **Backup History**.



3. Spanning Backup events display on the Past tab of the Activity page. Events are ordered by date.



The screenshot shows the Spanning Salesforce Activity page. The left sidebar contains navigation options: Dashboard, Restore, Export, Compare Metadata, Activity (selected), and Settings. The main content area is titled 'Activity' and has two tabs: 'Current' and 'Past' (selected). Below the tabs is a search bar labeled 'Search Log' and a filter icon. The results show '30 of 9932 Results' and a 'Refresh' button. The activity list is a table with the following columns: Date, Event, Duration, Actor, and Result. The events listed are:

Date	Event	Duration	Actor	Result
1/9/24 6:00:15 AM	Scheduled Backup	3 Minutes		Success
1/8/24 2:49:55 PM	Manual Backup	2 Minutes	joe.s...@spanning...com	Success
1/8/24 9:50:59 AM	Download Batch Output		joe.s...@spanning...com	Success
1/8/24 9:26:54 AM	Manual Backup	2 Minutes	joe.s...@spanning...com	Success
1/8/24 9:02:12 AM	Export	6 Minutes	joe.s...@spanning...com	Success
1/8/24 8:54:09 AM	Export	4 Minutes	joe.s...@spanning...com	Cancelled
1/8/24 6:00:15 AM	Scheduled Backup	3 Minutes		Success
1/7/24 6:00:16 AM	Scheduled Backup	3 Minutes		Success
1/6/24 1:48:56 PM	Metadata Restore	<1 Minute	joe.s...@spanning...com	Failed
1/6/24 9:33:34 AM	Metadata Compare	4 Minutes	joe.s...@spanning...com	Success
1/6/24 6:00:20 AM	Scheduled Backup	3 Minutes		Success
1/5/24 9:18:28 AM	Metadata Compare	<1 Minute	joe.s...@spanning...com	Success

A blue callout box with the text 'Scroll to view more events' and an arrow points to the bottom of the table.

4. You can do any of the following while viewing events on the Activity page:
- To filter the list of events, click , enter criteria, then click **Apply**:

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The screenshot shows the Spanning Salesforce Admin interface. The left sidebar contains navigation options: Dashboard, Restore, Export, Compare Metadata, Activity (selected), and Settings. The main area is titled 'Activity' and has tabs for 'Current' and 'Past'. A search log is visible above a table of activity events. A 'Filter' dialog is open, allowing users to filter by Actor (joe), Date (12/31/2023 to 1/8/2024), and Event Type (Backup). The 'Apply' button is highlighted with a blue circle '3'. On the right, a 'Result' column shows the status of each event, with 'Success' in green and 'Cancelled' in red. A blue circle '1' points to the 'Filter' button, and a blue circle '2' points to the 'Enter filter criteria' input field.

Date	Event	Result
1/9/24 6:00:15 AM	Scheduled Backup	Success
1/8/24 2:49:55 PM	Manual Backup	Success
1/8/24 9:50:59 AM	Download Batch Output	Success
1/8/24 9:26:54 AM	Manual Backup	Success
1/8/24 9:02:12 AM	Export	Success
1/8/24 8:54:09 AM	Export	Cancelled
1/8/24 6:00:15 AM	Scheduled Backup	Success
1/7/24 6:00:16 AM	Scheduled Backup	Success
1/6/24 1:48:56 PM	Metadata Restore	Failed
1/6/24 9:33:34 AM	Metadata Compare	Success
1/6/24 6:00:20 AM	Scheduled Backup	Success
1/5/24 9:18:28 AM	Metadata Compare	Success

The screenshot shows the Spanning Salesforce Admin interface with the Activity page filtered. A blue box above the table says 'The list is filtered'. The filter criteria are displayed as: actor:joe, eventType: Backup, startDate: 12/31/23 GMT, endDate: 01/08/24 GMT. The results show '2 of 9932 Results'. The table columns are Date, Event, Duration, Actor, and Result. Two rows are visible, both showing 'Manual Backup' events with a duration of '2 Minutes' and a 'Success' result.

Date	Event	Duration	Actor	Result
1/8/24 2:49:55 PM	Manual Backup	2 Minutes	joe.s...@spanning...com	Success
1/8/24 9:26:54 AM	Manual Backup	2 Minutes	joe.s...@spanning...com	Success

- Click an event to drill down and view details. You can then perform related operations from the detail page (e.g., export items from the View Backup page or download the CSV file from the View Export page).

The top screenshot shows the 'Activity' page in the Spanning Salesforce interface. The left sidebar contains navigation options: Dashboard, Restore, Export, Compare Metadata, Activity (selected), and Settings. The main content area is titled 'Activity' and has tabs for 'Current' and 'Past'. A search bar is present, and the results show 60 of 9932 results. A table lists activities with columns for Date, Event, Duration, Actor, and Result. A blue callout box points to the 'Scheduled Backup' event with the text 'Click an event'.

Date	Event	Duration	Actor	Result
1/4/24 11:47:04 AM	CSV Verification For Restore	<1 Minute	Timothy White	Success
1/4/24 6:00:17 AM	Scheduled Backup	3 Minutes		Success
1/3/24 3:29:17 PM	Metadata Restore	<1 Minute	joe.sc...h@spanning...com	Success

The bottom screenshot shows the 'View Backup' page for a backup taken on Thursday, January 4, 2024, at 06:00 AM. The page indicates the backup is 100% complete. There are tabs for 'Records' and 'Metadata'. A search bar is available, and the results show 1 Updated, 38 New, 0 Deleted, and 0 Undeleted records. A 'Show Modified Results Only' checkbox is checked. A table lists the backup details for various object types.

Type	Updated	New	Deleted	Undeleted
LoginGeo (27,716)*	0	25	0	0
FeedItem (18,225)	0	6	0	0
UserFeed (13,424)*	0	6	0	0
FileSearchActivity (266)*	0	1	0	0
User (18)	1	0	0	0

Spanning's REST API call limit

When first installed, Spanning is limited to 15% of your total available Salesforce REST API calls per day by default. This is to ensure that Spanning Backup does not exhaust the API call limit for your instance. You can increase or decrease this API call limit at any time from your Spanning Dashboard.

Spanning can back up between 200-1,000 records in your account per API call (depending on how many fields are in each record). However, we can back up only one attachment per API call. We recommend editing the Spanning API call limit accordingly. This way, Spanning can back up all of the data in your account in a timely manner without exhausting all of the API calls in your Salesforce instance.

It is important to remember that the initial backup of your Salesforce data takes the longest to complete since we are backing up all of the data in your account. After the initial backup is completed, subsequent daily backups will be much faster since we will only be backing up new and changed data.

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Please note that if the Spanning API limit is set too low, backups may run for many days if the API limit is reached before the backups complete. You can always modify the number of API calls that Spanning uses. After your initial backup completes, you can recalibrate this number to not use as many API calls.

See these topics for more on working with Spanning's REST API call limit:

- ["To determine the correct number of API calls"](#)
- ["To change the number of API calls that Spanning uses"](#)
- ["Bulk API"](#)

To determine the correct number of API calls

To determine the correct number of API calls for your instance, first check the number of available API calls in your Salesforce instance. Next, determine how many total attachments are in your instance by following these steps:

1. Log in to your Salesforce account as the admin user.
2. Click the **Setup** button in the upper-right corner of the screen.
3. Click the **Data Management** button in the left-panel navigation pane (if you are on Salesforce Lightning Experience, click the **Data** button in the left panel navigation pane).
4. Select the **Storage Usage** option from the sub menu.
5. Under the Current File Storage Usage subheading, you see the number of attachments:

Current File Storage Usage	
Record Type	Record Count
Accounts	18,305
Attachments	2,823
Documents	21
Photos	130
Content	99

6. If needed, modify the number of API calls as described in ["To change the number of API calls that Spanning uses"](#).

To change the number of API calls that Spanning uses

1. Log in to Spanning Backup for Salesforce.
2. On the Dashboard, scroll down to the REST API section.
3. Review recent API usage.

4. Check today's API usage:

The screenshot shows the SPANNING dashboard interface. On the left is a navigation menu with options: Dashboard, Restore, Export, Compare Metadata, Activity, and Settings. The main content area is divided into two sections:

- Recent Activity:** A table with columns for Date, Activity, User, and Status. It lists several successful scheduled backups from December 28, 2023, to January 2, 2024.
- API Calls:** A section with tabs for Rest API and Bulk API. It shows a bar chart for 'Today's API usage' at 4%. There are buttons for 'Change API Account' and 'Change API Limit', and radio buttons for 'Today' (selected) and 'History'.

5. Select the **History** option to check API usage over the last 8 days:

This screenshot shows the same dashboard but with the 'History' option selected in the API Calls section. The 'Recent Activity' table remains the same. The 'API Calls' section now displays a line chart titled 'Last 7 days' showing 'Call Count' on the y-axis (0 to 40,000) and dates on the x-axis (12/25 to 1/01). A solid blue line represents 'Calls' and a dashed black line represents the 'Limit' at 40,000. A tooltip for 12/31 shows 'Limit: 40000' and 'Calls: 1626'. A callout box points to the 'History' radio button with the text 'Click to view API usage over the last 8 days'.

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6. Click **Change API Limit**.

The screenshot shows the SPANNING Backup for Salesforce dashboard. The left sidebar contains navigation options: Dashboard, Restore, Export, Compare Metadata, Activity, and Settings. The main content area displays a table of backup activities with columns for Date, Activity, User, and Status. Below the table is the 'API Calls' section, which includes a 'Change API Limit' button highlighted with a blue arrow and the text 'Click here'. A line graph shows 'Last 7 days' of API call counts, with a legend for 'Calls' and 'Limit'. A tooltip for 12/31 shows a Limit of 40000 and Calls of 1626.

Date	Activity	User	Status
Tue. January 2, 2024 06:00 AM	✓ Scheduled Backup		Success
Mon. January 1, 2024 06:00 AM	✓ Scheduled Backup		Success
Sun. December 31, 2023 06:00 AM	✓ Scheduled Backup		Success
Sat. December 30, 2023 06:00 AM	✓ Scheduled Backup		Success
Fri. December 29, 2023 06:00 AM	✓ Scheduled Backup		Success
Thu. December 28, 2023 06:00 AM	✓ Scheduled Backup		Success

7. Enter the new limit. Click **Yes**.

The screenshot shows the SPANNING Backup for Salesforce dashboard with the 'Change API Limit' dialog box open. The dialog box contains a text input field with the value '10000' and a '+' button, highlighted with a blue circle and the number '1'. Below the input field are 'Cancel' and 'Yes' buttons, with the 'Yes' button highlighted with a blue circle and the number '2'. The background shows the same dashboard as the previous screenshot.

Set the MAXIMUM number of day API calls that Spanning Backup may use.

10000

Cancel Yes

Bulk API

Under special circumstances, an environment might be so large or the rate of change so significant that the normal REST API capacity is not enough to keep up. In these rare cases, Spanning can utilize Bulk API methods instead to process large batches of data for backup.

- Bulk queries are metered separately and differently from REST queries.
- Bulk queries are measured and limited by the hour.

Customizing the Dashboard

The Dashboard provides a high-level overview of your Spanning Backup for Salesforce environment. You can customize the Spanning Dashboard to view backup details of the four object types that are most important to you (see "[To change the object types displayed on the Dashboard](#)").

The screenshot shows the Spanning Backup for Salesforce Dashboard. At the top, it displays the date and time of the last backup: Wednesday, January 10, 2024, 6:00 AM. A green banner indicates that the backup was successful. A circular progress indicator shows 100% completion. Below this, there are four cards for different object types: Accounts, Leads, Cases, and Contacts. Each card shows 0 Updated, 0 New, 0 Deleted, and 0 Undeleted items. A 'Last 30 Backups' section shows a row of 30 green bars representing backup history. A 'Subscription' section indicates 'Not Enough Licenses' with an expiration date of 3/24/50 and 7 users.

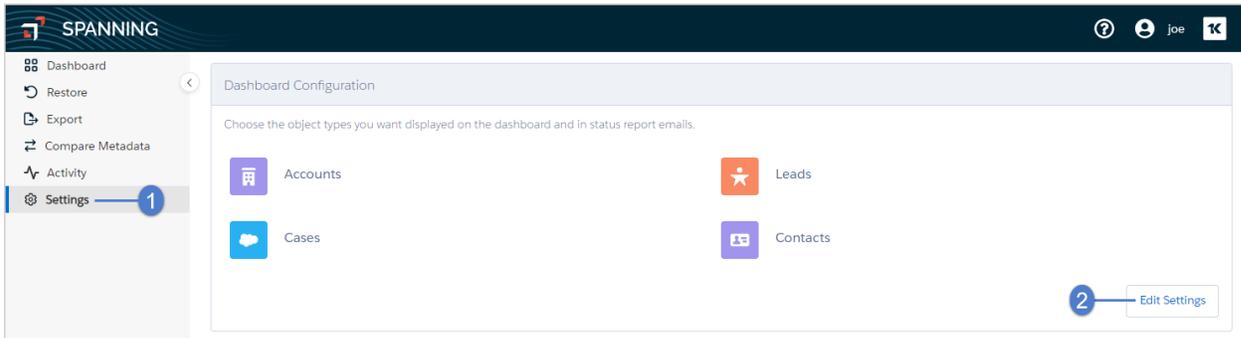
To change the object types displayed on the Dashboard

Note: Status notifications are generated only for the four objects that display on the Dashboard. Changing the display changes which status notifications are generated.

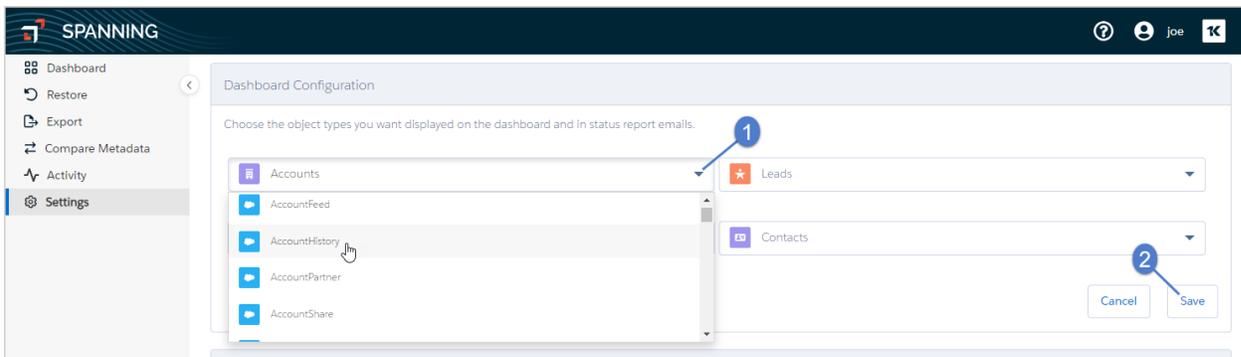
1. Log in to Spanning Backup for Salesforce.
2. Click **Settings**.

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3. In the Dashboard Configuration section, click **Edit Settings**.



4. Select your preferred object types from the drop-down lists.
5. Click **Save**.



Configuring Spanning Backup Settings

As your Salesforce environment changes over time, you may need to adjust various Spanning Backup settings. See these topics to view or modify your Spanning Backup settings:

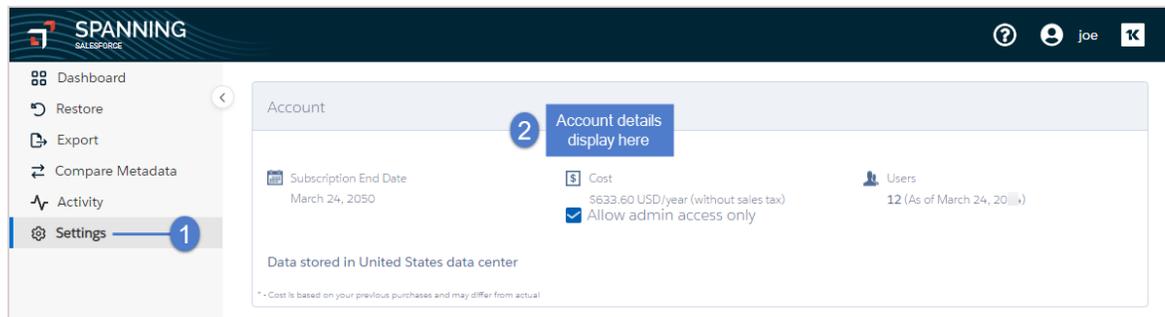
- ["Viewing account information"](#) to see your account's subscription end date, cost, number of users, and data center location.
- ["Working with notifications and alerts"](#) to enable email notifications and set up custom alerts.
- ["Assigning custom roles and permissions"](#) to specify which Spanning Backup functions a user can access.
- ["Configuring the external API key and secret"](#) to view or modify the API key and secret used by the Spanning backup process.
- ["Handling sensitive data"](#) to remove or anonymize sensitive records in your Spanning Backup for Salesforce environment.
- ["Integrating KaseyaOne and UniView"](#) to view or modify integration settings for KaseyaOne or UniView.

Viewing account information

To view information about your Spanning Backup for Salesforce account:

1. Log in to Spanning Backup for Salesforce.
2. Click **Settings**.

3. The following information displays in the Account tile:
 - Subscription End Date – End date of your Spanning Backup subscription. (Spanning Backup requires a yearly subscription that's billed at the time of purchase/activation.)
 - Cost – Cost of the account per year based on previous purchases (actual price may differ from what is shown here).
 - *Allow admin access only* check box – If this box is checked, only admin users can log in to Spanning Backup for Salesforce.
 - Users – Number of Spanning Backup users as of the date displayed.
 - Data stored in data center – Indicates the location of the data center where your Spanning Backup data is stored.



Working with notifications and alerts

Based on your preferences, you can set up email notifications, Chatter notifications, and custom alerts to monitor activities performed by Spanning Backup for Salesforce. See these topics for details:

- ["Status notification emails"](#)
- ["Billing notification emails"](#)
- ["Chatter posts"](#)
- ["Rule-based alerts"](#)

Status notification emails

Status notifications are generated for the four objects that display on your Dashboard. To view or modify these objects, see ["Customizing the Dashboard"](#).

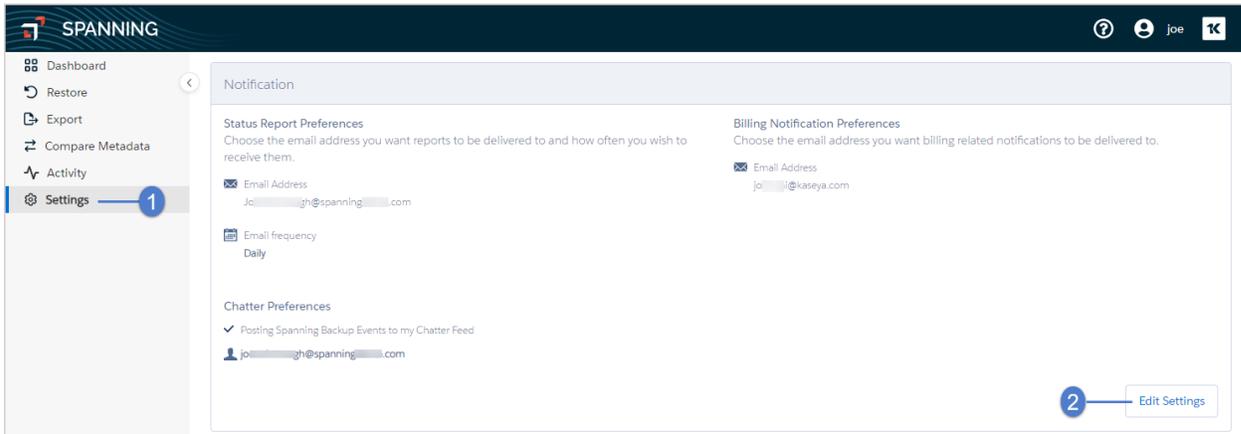
Spanning allows you to select daily or weekly emails for status notifications.

To enable status notification emails

1. Log in to Spanning Backup for Salesforce.
2. Click **Settings**.

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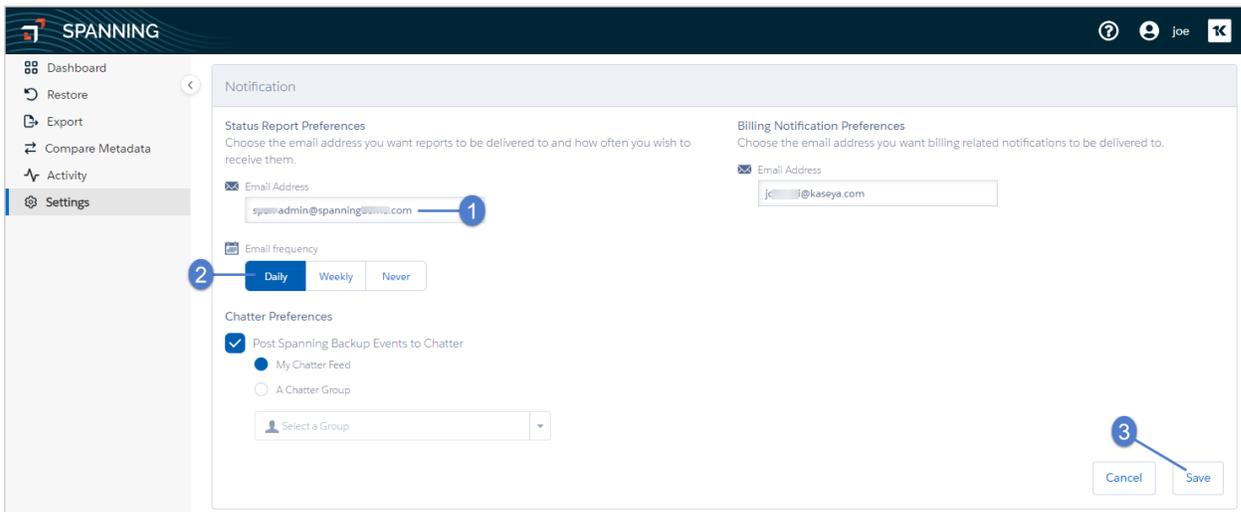
- In the Notification section, click **Edit Settings**.



- Add the email address of the admin user or distribution list that will receive status notifications.

Note: The email address you enter here is also used for rule-based alerts.

- Set the frequency of email notifications to Daily or Weekly.
- Click **Save**.

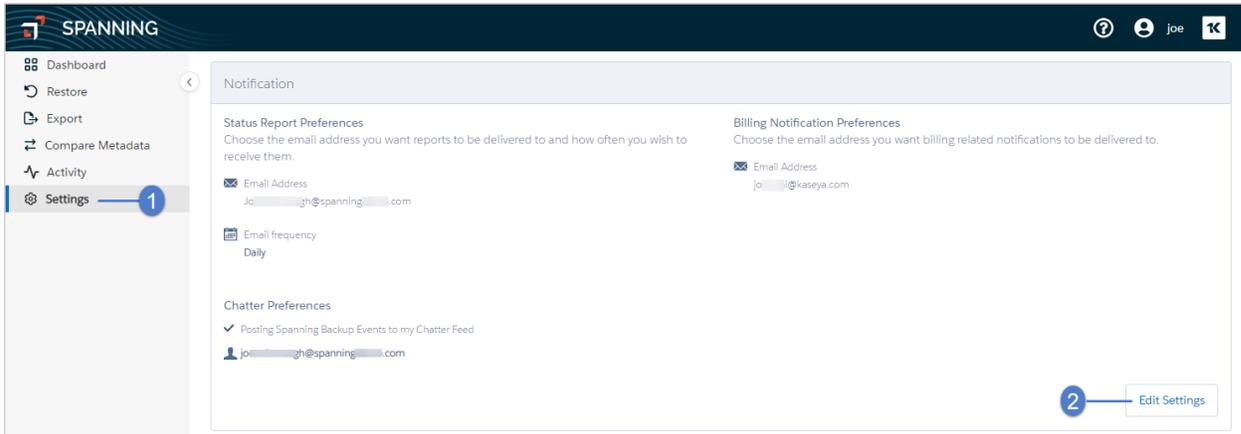


Billing notification emails

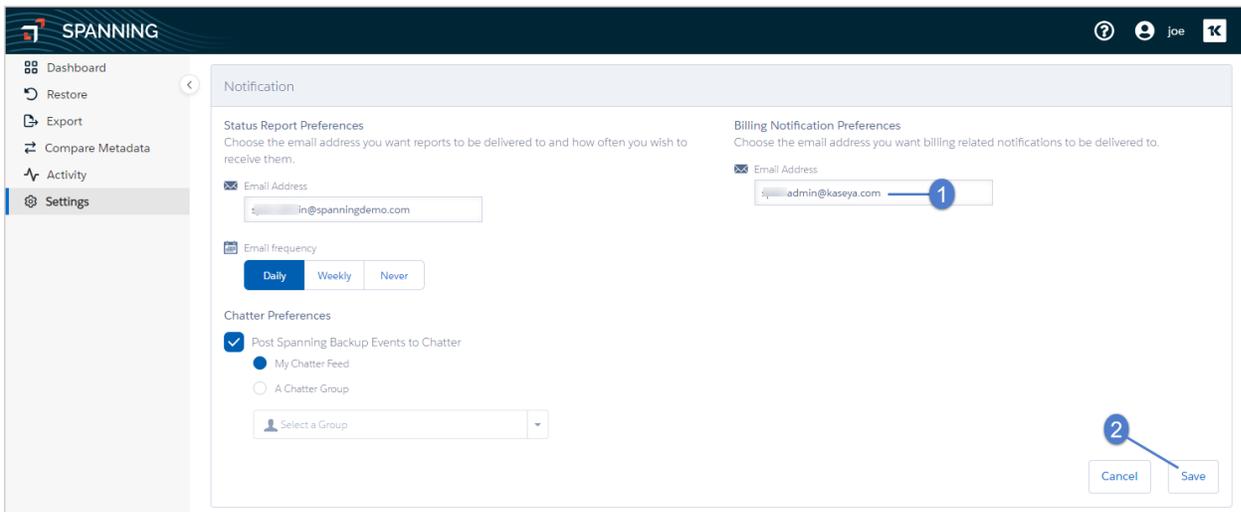
Spanning sends email notifications related to payments and renewals. To prevent the account from accidentally expiring and putting your data at risk because of delays with payments and renewals, Spanning recommends using an email distribution list for billing notifications.

To modify the email address for billing notifications

1. Log in to Spanning Backup for Salesforce.
2. Click **Settings**.
3. In the Notification section, click **Edit Settings**.



4. Edit the email address of the admin user or distribution list that will receive billing notifications.
5. Click **Save**.



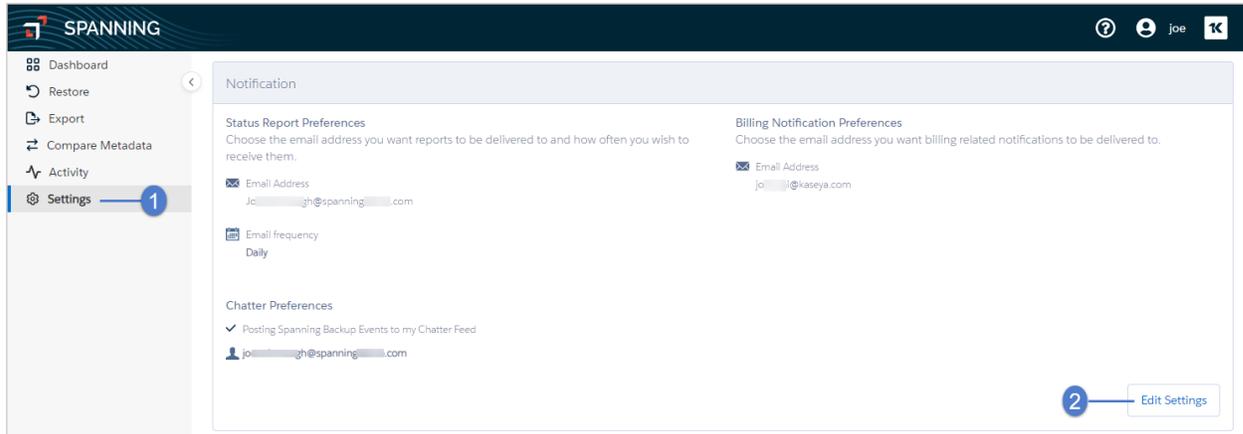
Chatter posts

Spanning can post the status of your backups, restores, and exports directly to Chatter.

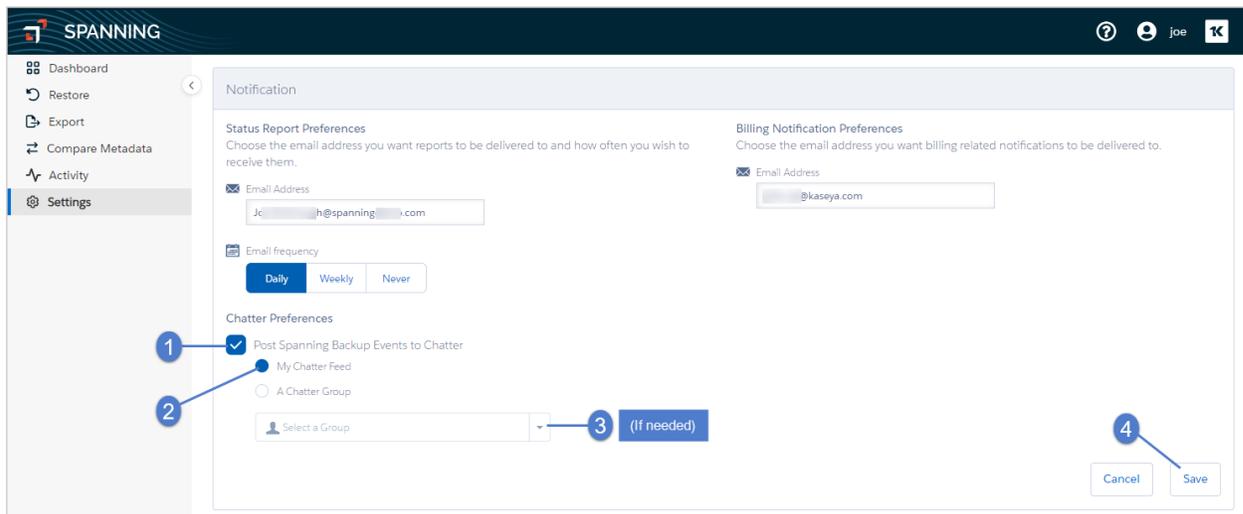
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To enable Chatter posts

1. Log in to Spanning Backup for Salesforce.
2. Click **Settings**.
3. In the Notification section, click **Edit Settings**.



4. Check the **Post Spanning Backup Events to Chatter** option.
5. Select whether you would like the Chatter posts to show up in My Chatter Feed or in a specific Chatter Group. For the Chatter Group option, select a group from the list.
6. Click **Save**.



Rule-based alerts

Use the rule-based alerts feature to set up custom alerts to notify admins of unusual Salesforce activity, which could be an indicator of malicious events, data corruption, or a failed integration.

As a Spanning Backup for Salesforce admin, you can set alerts when there is significant activity (adds, deletes, modifications) on any object type.

You can set these types of alerts:

- Absolute alerts – Use to be notified when the number of objects added, deleted, or modified goes over or under a preset number. For example, you could set up an alert to notify you when 200 or more accounts are deleted. Or, if you have an integration that normally updates all your accounts every night and want to be alerted if it stops working, you could set an alert to notify you when the number of account updates is too low.
- Relative alerts – Use to be notified when the number of objects deleted, modified, or added goes up or down versus the previous backup— either by a specific number of objects or by a percentage. For example, if you want to spot unusually high deletion activity on contacts, you could set an alert to notify you when the number of contact deletions noted in the most recent backup increases by at least 20% versus the previous backup.

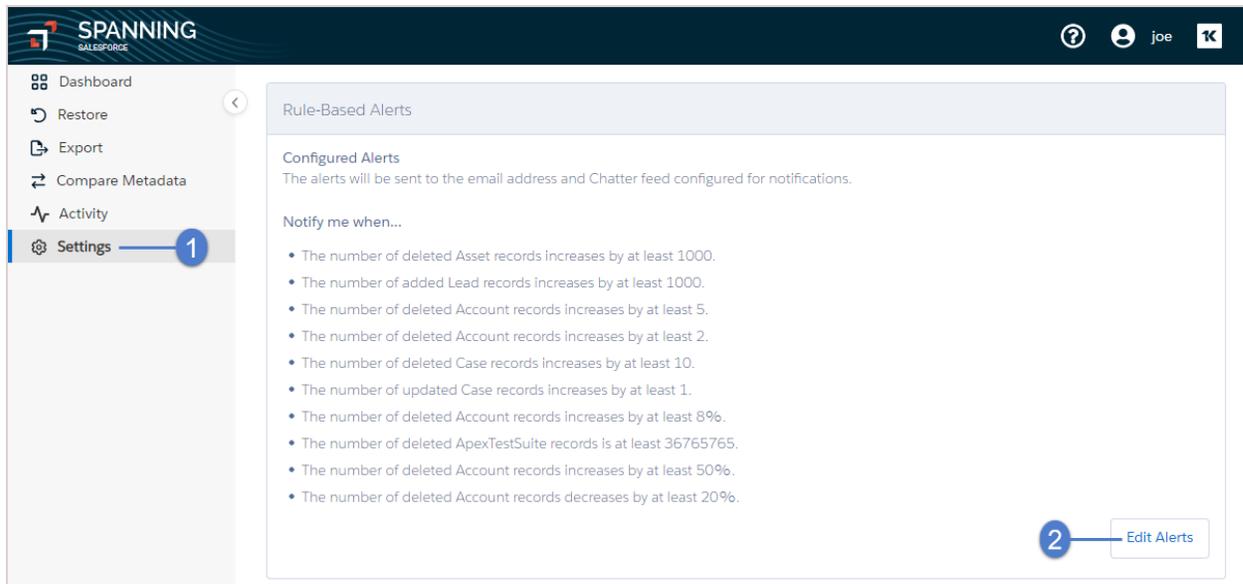
When a backup completes, Spanning Backup totals the number of objects added, deleted, modified, and undeleted for each object type. Then, based on the alerts you have configured, Spanning sends an email or post in Chatter for each alert condition that was triggered.

Alerts are sent to the email address specified in the Notification > Status Report Preferences > Email field. To view or modify this email address, see "[Status notification emails](#)". Alerts are also posted to Chatter (if enabled).

Rule-based alert example

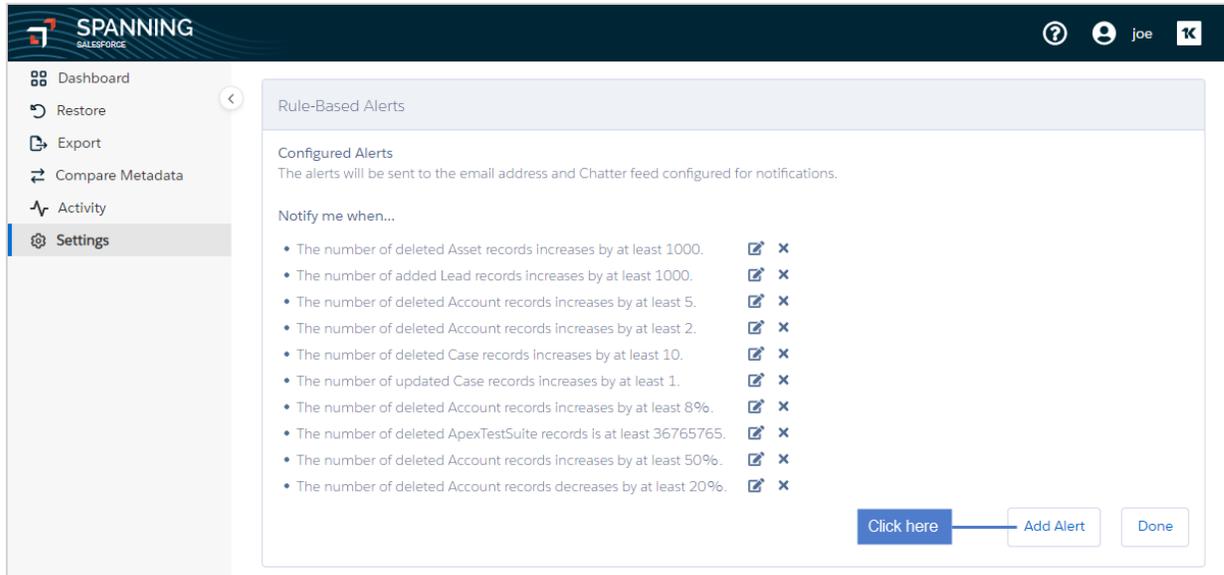
In this example, we will set up an alert that is triggered if at least 100 contacts are modified between backups.

1. Log in to Spanning Backup for Salesforce.
2. Click **Settings**.
3. In the Rule-Based Alerts section, click **Edit Alerts**. The Alert panel changes to edit mode, where you can add new rules and edit any existing rules.

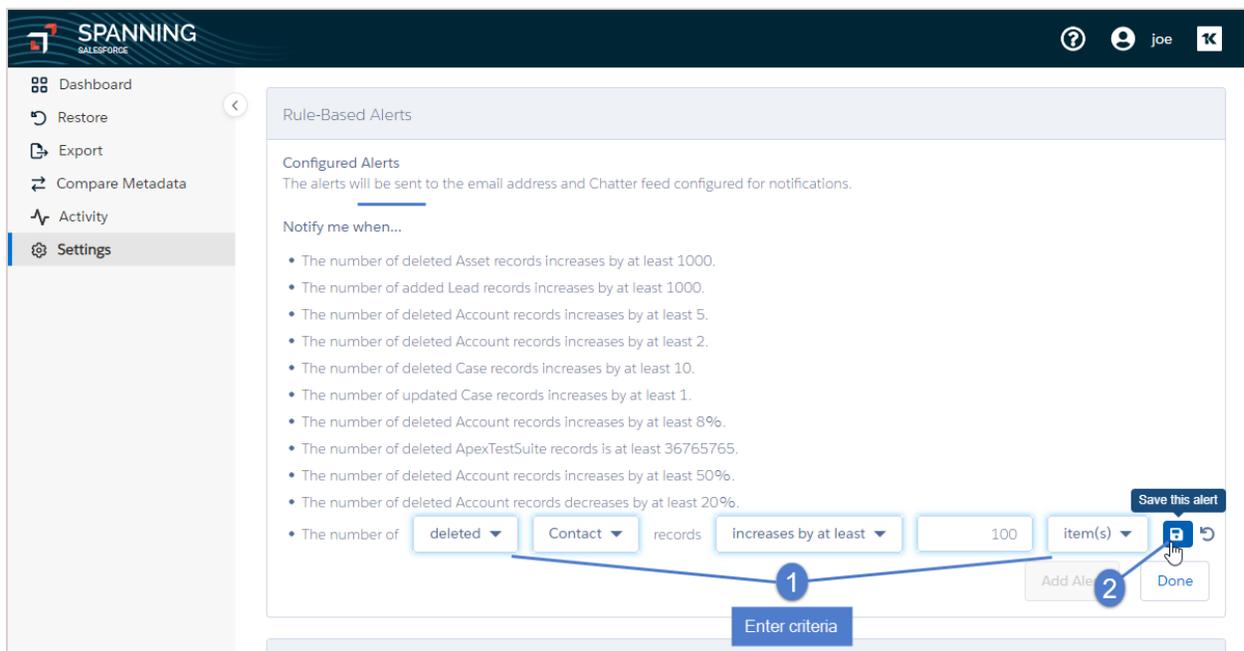


4. Click **Add Alert**.

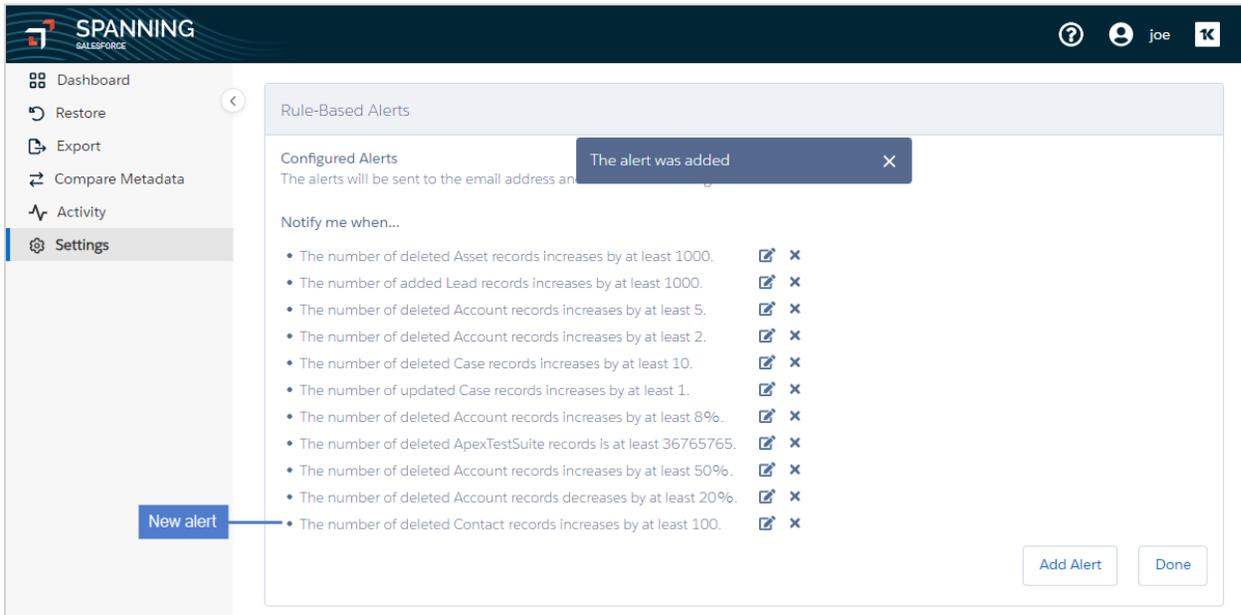
Note: You can also edit an existing alert by clicking  or delete an alert by clicking .



5. To set a rule that alerts when 100 or more contacts are deleted between backups, enter the alert criteria as shown in the following screenshot. Click .



6. The alert is added:



Assigning custom roles and permissions

Access to Spanning Backup for Salesforce is controlled by the Salesforce administrator. By default, Spanning Backup is installed only for Salesforce administrators (users that have the administrator profile and privileges in Salesforce). Additionally, Spanning provides a default setting that verifies the permissions of the logged-in user to ensure they have been granted proper access to your Salesforce.com data.

The Salesforce administrator can grant further access to Spanning by configuring Salesforce and by disabling the permissions check within Spanning Backup.

By default, the Spanning Backup accounts that are created for Salesforce administrators enable users to perform all Spanning Backup operations.

For more granular control of which Spanning Backup for Salesforce functions an administrator can access, you can opt to enable or disable user roles and permissions. See these topics for details:

- ["Spanning roles and permissions"](#)
- ["To assign custom roles and permissions to a user"](#)

Spanning roles and permissions

Spanning roles and permissions are described in the following table:

Role or permission type	Description
Administrator	Administrator is the default role. This role allows access to all Spanning Backup

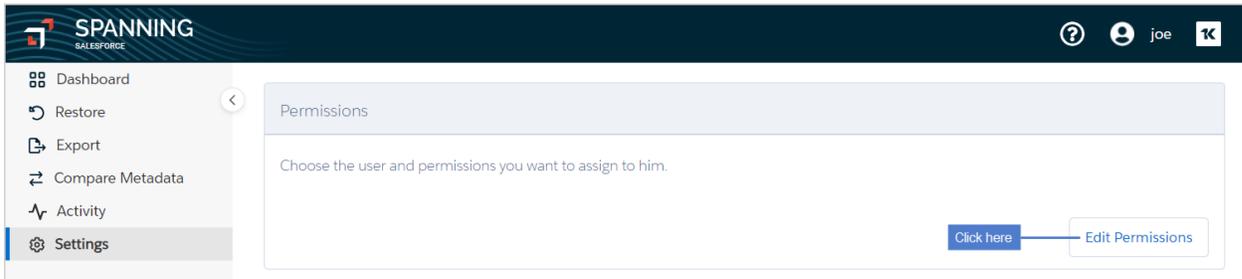
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Role or permission type	Description
	<p>functions.</p> <p>Note: Only the Administrator can assign or un-assign the Administrator role from other users.</p>
Backups	Allows a user to manually start a backup on demand. (For details, see "Running a backup" .)
Metadata Compare	Allows a user to view and run a Metadata Compare. (For details, see "Comparing Metadata" .)
Settings	Allows a user to view and make changes to Spanning Backup for Salesforce settings. Configurable settings include: the automated backup schedule, notifications, Dashboard configuration, user permissions, rule-based alerts, the external API key & secret, and backup data deletion and anonymization. (For details, see "Configuring Spanning Backup Settings" .)
Permissions	<p>Allows the user to add or remove permissions from Spanning Backup users.</p> <p>Note: Requires the Settings permission to be added as well.</p>
Backup Data Deletion And Anonymization	<p>Allows the user to use the Backup Data Deletion and Anonymization feature to remove or overwrite sensitive Spanning Backup for Salesforce data. For details, see "Handling sensitive data".</p> <p>Note: Requires the Settings permission to be added as well.</p>
Exports	Allows the user to export data from backup. For details, see "Exporting Data" .
Restores	Allows the user to restore data from backup. For details, see "Restoring Object Data" or "Restoring Metadata" .
API Usage	Allows the user to access the API usage feature. For details, see "Spanning's REST API call limit" .
Activity History	Allows the user to access the Activity History feature. For details, see "Viewing Application Activity" .
External API Key & Secret	<p>Allows the user to view or modify the external API key & secret used by the Spanning backup process. For details, see "Configuring the external API key and secret".</p> <p>Note: Requires the Settings permission to be added as well.</p>

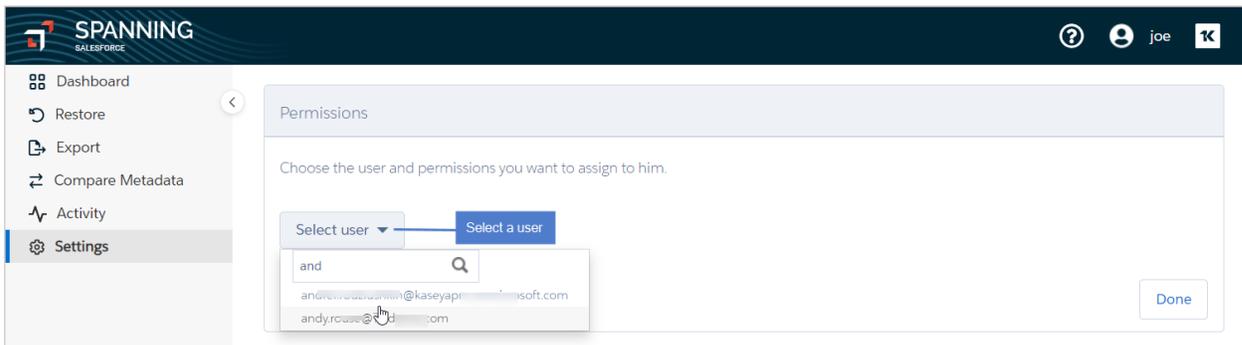
To assign custom roles and permissions to a user

1. Log into Spanning Backup for Salesforce.
2. Click **Settings**.

3. In the Permissions section, click **Edit Permissions**:



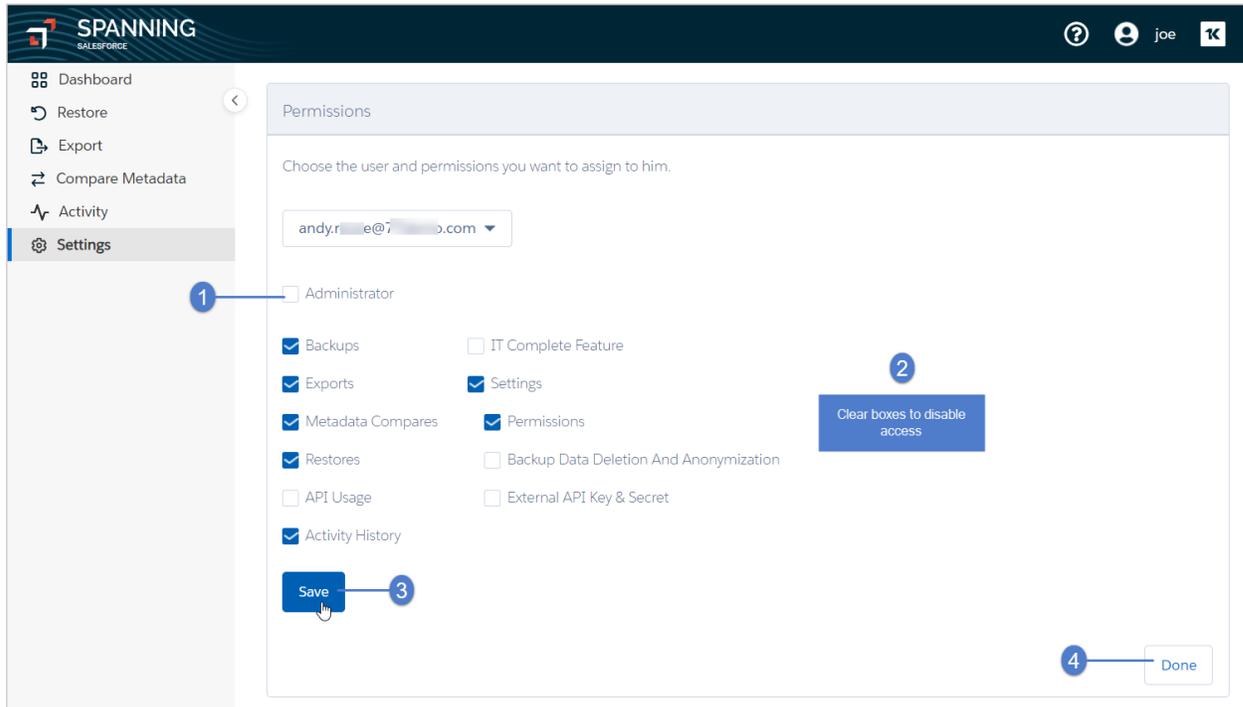
4. Select the user:



5. Clear the Administrator box, clear additional boxes to disable access to those features, then click **Save**.

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6. Click **Done** to exit.

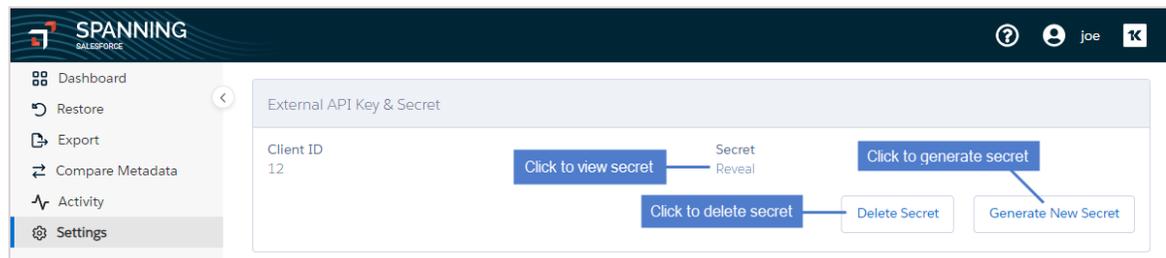


Configuring the external API key and secret

The external API key and secret are used by the Spanning backup process to access Salesforce data. The key and secret were configured during Spanning Backup for Salesforce installation. Use this procedure as needed to view or modify the API secret.

To view or modify the external API secret

1. Log into Spanning Backup for Salesforce.
2. Click **Settings**.
3. In the External Key & Secret section, do any of the following:
 - To view the secret, click **Reveal**.
 - To delete the secret, click **Delete Secret**, then click **Confirm**.
 - To generate a new secret, click **Generate New Secret**, then click **Confirm**.



Handling sensitive data

With the Backup Data Deletion and Anonymization feature, you can easily overwrite or delete sensitive data from Spanning Backup to stay in compliance with regional regulations, such as GDPR or CCPA. This feature enables you to upload a CSV file containing the Salesforce IDs of the records to overwrite or delete. Spanning recommends that you overwrite rather than delete sensitive data to preserve the data structure. Review the information in "[Overwriting sensitive data](#)" and "[Deleting sensitive data](#)" for details. Then run the "[To overwrite or delete sensitive data](#)" procedure to anonymize or delete your data.

Note: The Backup Data Deletion and Anonymization feature does not change production Salesforce data in any way.

Overwriting sensitive data

Overwriting sensitive data is the preferred way to address a GDPR request. The overwrite operation overwrites all data values with fake data. It does not change the data structure. This fake data is used to replace your sensitive information:

- Strings are overwritten with **XXXXXXXXXXXX**.
- Numbers are overwritten with **0**.
- Booleans are overwritten with **false**.
- Dates are overwritten with **Jan 1, 1970**.
- Blobs are overwritten with a file that contains the string **This file has been overwritten as part of a GDPR request**.

Deleting sensitive data

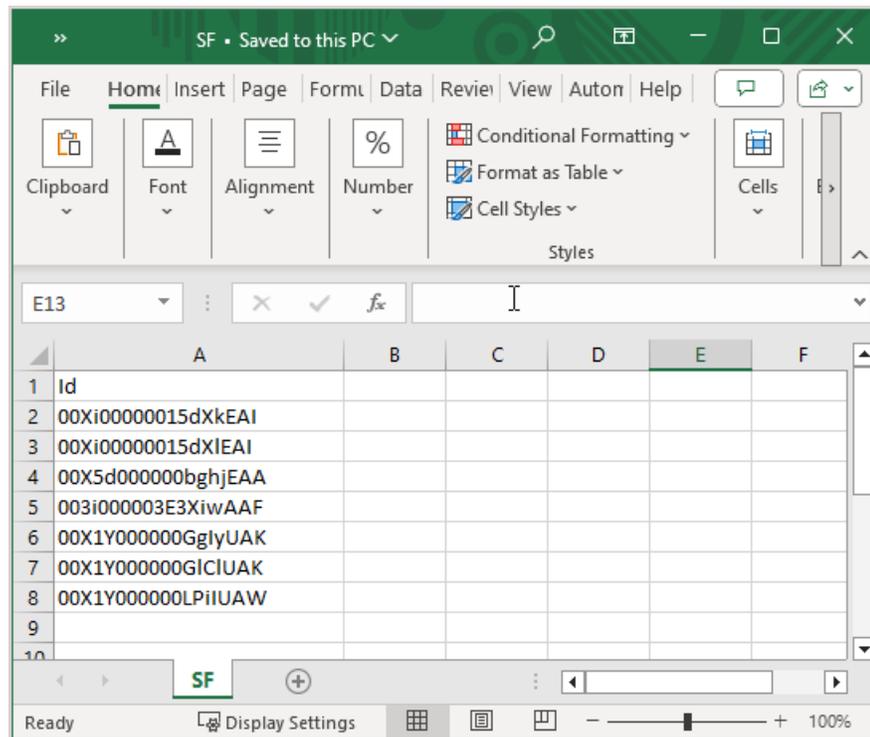
The delete operation removes sensitive records and their children from Spanning Backup, which changes the data structure. The delete operation does not change counters in any way (e.g., counts of saved records and deleted records do not change).

IMPORTANT After deleting records, you might not be able to successfully perform some operations (such as restores) if you have deleted any dependent child records needed for the operation. Because of this, Spanning recommends using the overwrite option instead of deleting records. Only use the delete option if absolutely necessary.

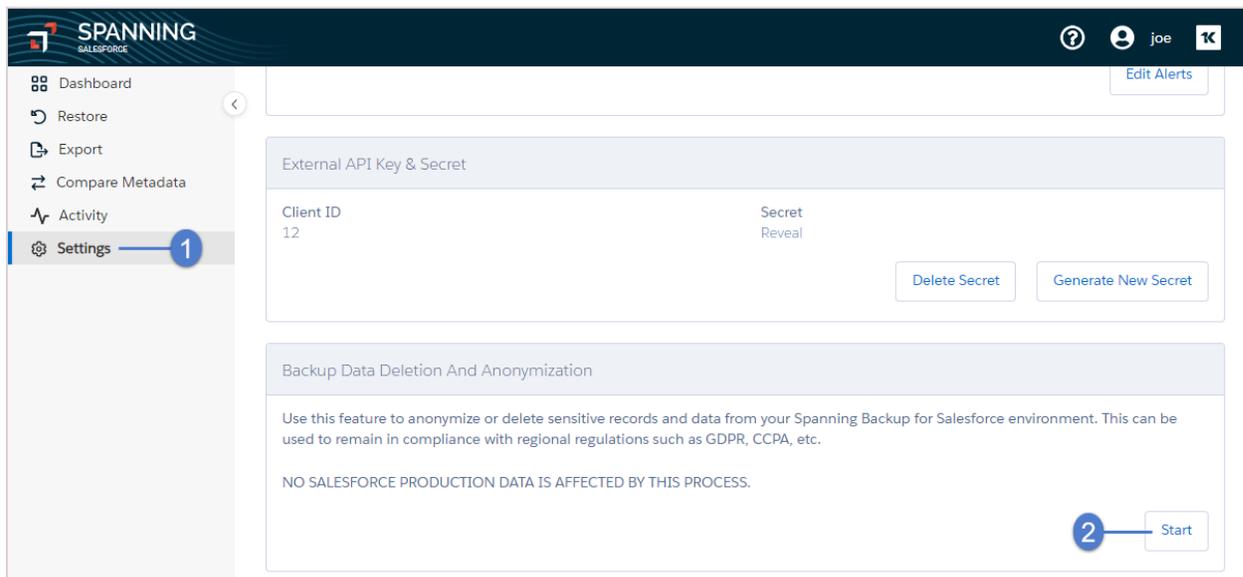
To overwrite or delete sensitive data

1. Prepare your CSV file to match the format in the screenshot below.
 - The CSV must contain a column with a header of **Id** (no quotes, not case-sensitive). The CSV can contain other columns if you'd like— Spanning Backup will only use the ID column and will ignore any other columns.
 - In the **Id** column, list all of the Salesforce IDs that you want to overwrite or delete. The IDs can be records of any object type. All Salesforce IDs to be loaded should be 18 characters long. The maximum file size allowed is 100MB.

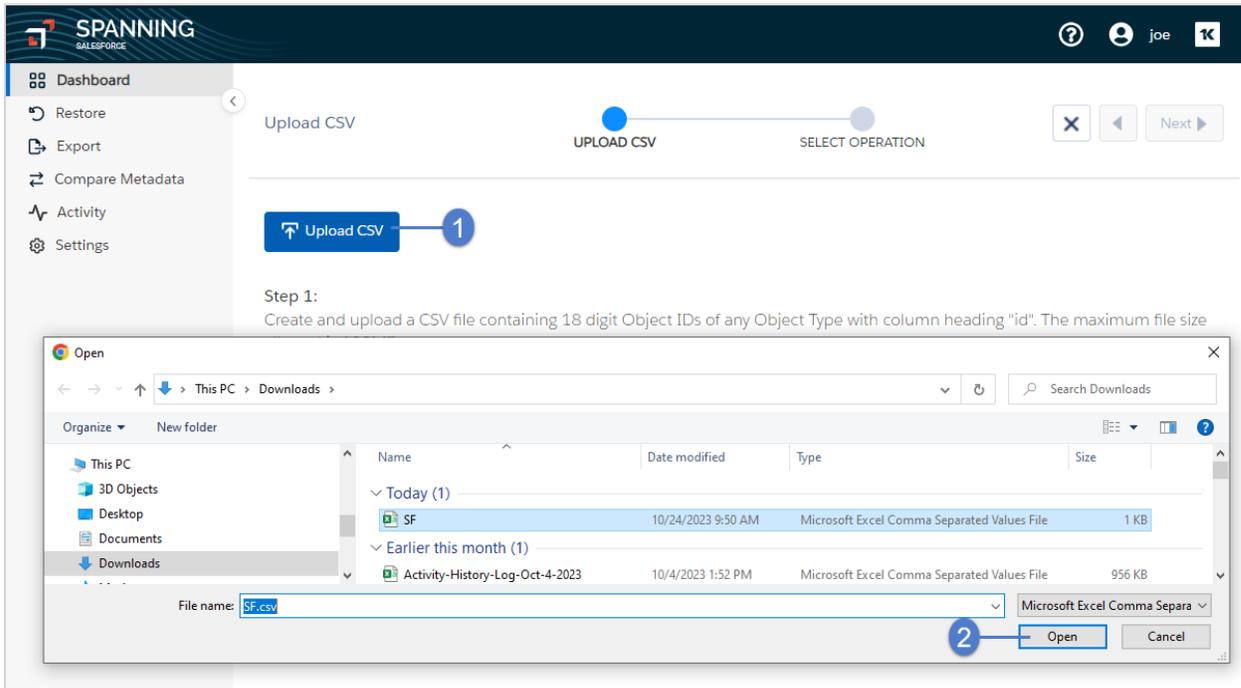
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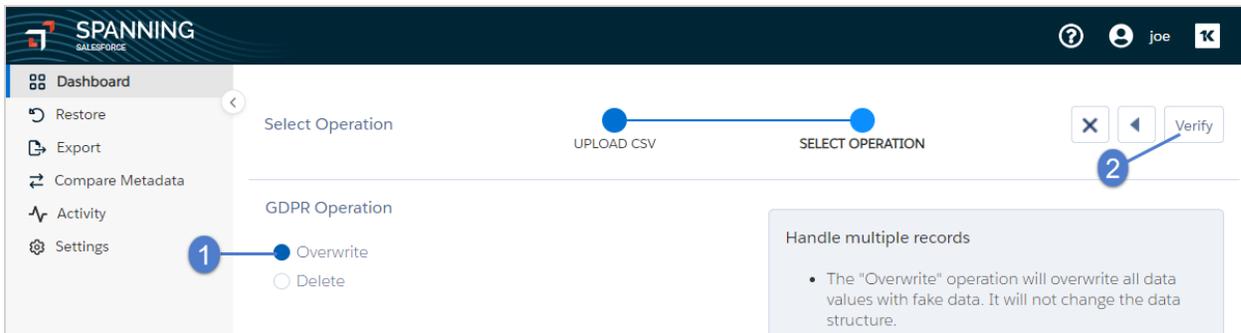
2. Log in to Spanning Backup for Salesforce.
3. Click **Settings**.
4. Under Backup Data Deletion and Anonymization, click **Start**:



5. Click **Upload CSV**. Browse to upload your CSV file.



6. Select **Overwrite** or **Delete**.
7. Verify your CSV file.



8. Review the verification results. Click **Perform Overwriting** or **Perform Delete**.

The screenshot displays the Spanning Salesforce interface. The top navigation bar includes the Spanning logo, a user profile for 'joe', and a notification icon. The left sidebar contains menu items: Dashboard, Restore, Export, Compare Metadata, Activity (selected), and Settings. The main content area is titled 'View Data Deletion and Anonymization Overwriting: Sat, Jan 13, 2024 10:25 AM' and shows a '100% Complete' status. A table lists verification results with columns for Record ID, Records Count, and Status. A 'Review verification results' button is highlighted with a '1' callout, and a 'Perform Overwriting' button is highlighted with a '2' callout.

Record ID	Records Count	Status
00X1[REDACTED]AK	2	Success
00X[REDACTED]AK	2	Success
00X[REDACTED]JAW	2	Success
00X[REDACTED]EAA	1	Success
00X[REDACTED]AI	1	Success
00X[REDACTED]EAI	1	Success

9. On the Dashboard, you can see the overwrite or delete operation running:

The screenshot displays the Spanning Backup for Salesforce Admin Dashboard. The top navigation bar includes the Spanning logo, a help icon, a user profile for 'joe', and a close icon. The left sidebar contains navigation options: Dashboard, Restore, Export, Compare Metadata, Activity, and Settings. The main content area is titled 'DASHBOARDS' and shows the date and time: 'Saturday January 13, 2024 6:00 AM'. A large green progress indicator shows '100%' completion for a backup, with the message 'Backup was Successful!' and 'There were 0 errors and 0 warnings'. Below this, it states 'Your next automated backup is scheduled for 6:00 AM tomorrow'. There are buttons for 'Backup Now' and 'Restore'. The dashboard also features four summary cards for 'Accounts', 'Leads', 'Cases', and 'Contacts', each showing '0 Updated, 0 New, 0 Deleted, 0 Undeleted'. A 'Last 30 Backups' section shows a row of 30 green bars, with the last one having a checkmark. A 'Subscription' card indicates 'Not Enough Licenses' and shows 'Expiration Date: 3/24/50', 'Licenses Purchased: 7', and 'Users: 12'. At the bottom, an 'In-Preparing' section shows 'GDPR running' with a progress bar at 0% and a 'Cancel' button. A blue callout box on the left says 'Records are overwritten or deleted'.

10. When the operation is complete, view the results on the Dashboard by clicking the **GDPR Overwriting** or **GDPR Deleting** row in the Recent Activity.

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The screenshot displays the Spanning Backup for Salesforce dashboard. The left sidebar contains navigation options: Dashboard, Restore, Export, Compare Metadata, Activity, and Settings. The main content area is divided into several sections:

- Last 30 Backups:** A section with a 'Backup History' button and a row of 30 green progress indicators.
- Subscription:** A summary box showing 'Not Enough Licenses', 'Expiration Date: 3/24/50', 'Licenses Purchased: 7', and 'Users: 12'.
- Recent Activity:** A table listing recent operations. A callout box points to a 'GDPR Overwriting' entry with the message: 'Overwrite completed successfully. Click to view details'.

Date	Activity	User	Status
Sat, January 13, 2024 10:29 AM	✓ GDPR Overwriting	joe.s...h@spanning...com	Success
Sat, January 13, 2024 10:25 AM	✓ GDPR Verification	joe.s...h@spanning...com	Success
Sat, January 13, 2024 06:00 AM	✓ Scheduled Backup		Success

The second screenshot shows the 'Activity / Data Deletion and Anonymization Verification' page. The title is 'View Data Deletion and Anonymization Overwriting: Sat, Jan 13, 2024 10:29 AM'. It indicates '100% Complete' and features a 'Details display' button. Below is a table of records:

Record ID	Records Count	Status
00X[REDACTED]JAK	2	Success
00X1Y[REDACTED]UAK	2	Success
00X[REDACTED]JAW	2	Success
00X[REDACTED]EAA	1	Success
00X[REDACTED]EAI	1	Success
00X[REDACTED]EAI	1	Success

Integrating KaseyaOne and UniView

Spanning Backup for Salesforce is pleased to announce the integrated authentication option for Kaseya VSA and Unitrends UniView. This feature enables the seamless authentication from Kaseya VSA or Unitrends UniView when configured in Spanning Backup for Salesforce. The control of the feature lies inside Spanning Backup for Salesforce. This feature makes multi-organization management of Spanning backup for Salesforce significantly easier for Managed Service Providers or our Direct customers with multiple Salesforce organizations. This alternate authentication also removes the requirement for Salesforce Administrators to provide additional credentials to partners who manage their backups, further securing their Salesforce organizations.

See these procedures for details:

- ["To enable IT Complete login for UniView"](#)
- ["To enable IT Complete login for VSA"](#)

- "To disable IT Complete login"

To enable IT Complete login for UniView

This procedure must be run from the UniView Backup Portal. In the [UniView Portal Guide](#), follow the procedure under **Integrating a Salesforce organization**. Upon completing these steps in UniView, return to Spanning Backup for Salesforce. The integration you added displays on the Settings page in the Kaseya IT Complete Features section. Ensure that the **Allow Kaseya IT Complete login for administrators** box is checked to enable log in with IT Complete.

The screenshot displays the Spanning Backup for Salesforce interface. The top navigation bar includes the Spanning logo, user profile 'joe', and an 'Edit Alerts' button. The left sidebar lists navigation options: Dashboard, Restore, Export, Compare Metadata, Activity, and Settings (highlighted with a blue circle and '1'). The main content area is divided into three sections:

- External API Key & Secret:** Shows Client ID '12' and Secret 'Reveal'. Buttons for 'Delete Secret' and 'Generate New Secret' are present.
- Backup Data Deletion And Anonymization:** Includes a description of the feature and a 'Start' button. A note states: 'NO SALESFORCE PRODUCTION DATA IS AFFECTED BY THIS PROCESS.'
- Kaseya IT Complete Features:** Contains a checked checkbox for 'Allow Kaseya IT Complete login for administrators' (highlighted with a blue circle and '3'). Below are sections for 'Linked K1 Organization' (with a dropdown menu) and 'Linked Backup.Net Organization' (with a dropdown menu).

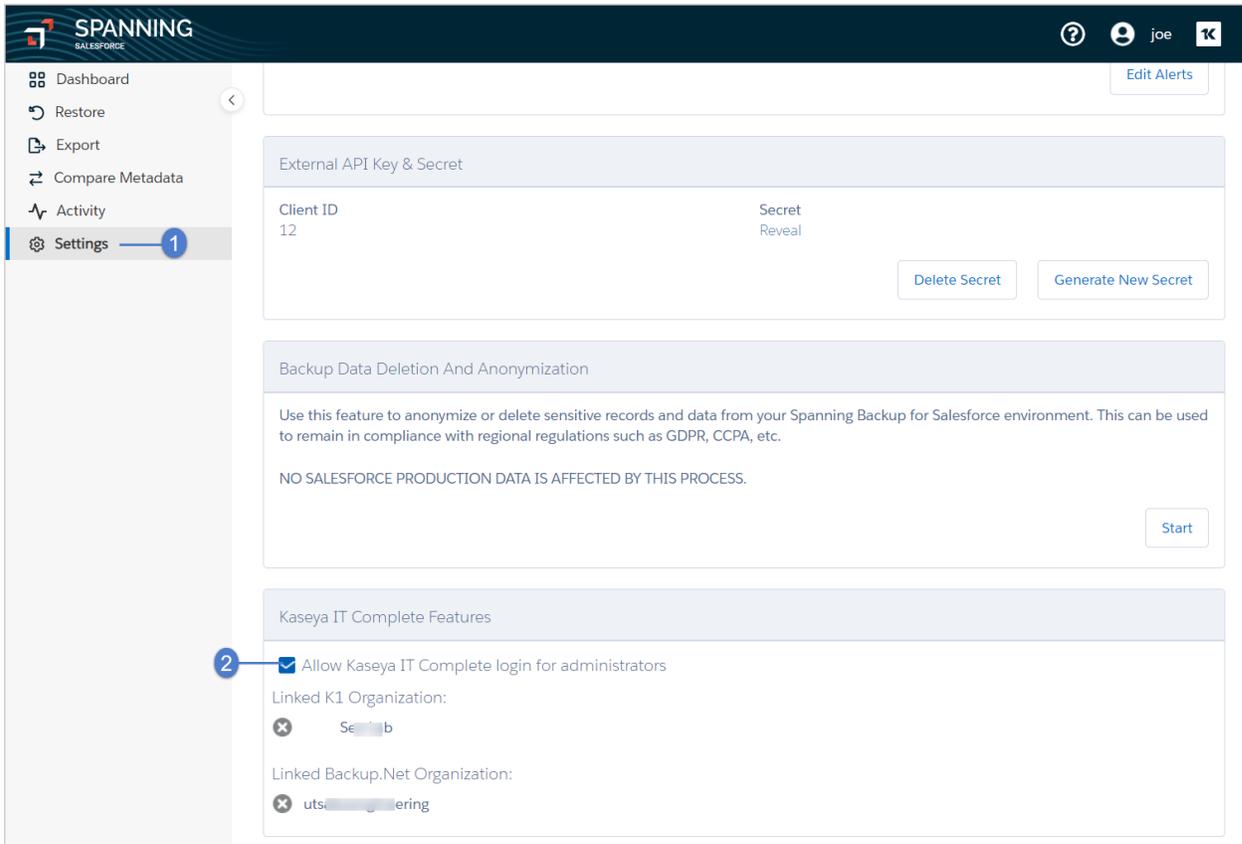
A blue box at the bottom left of the screenshot contains the text: 'UniView is linked to Spanning Backup for Salesforce' (highlighted with a blue circle and '2').

To enable IT Complete login for VSA

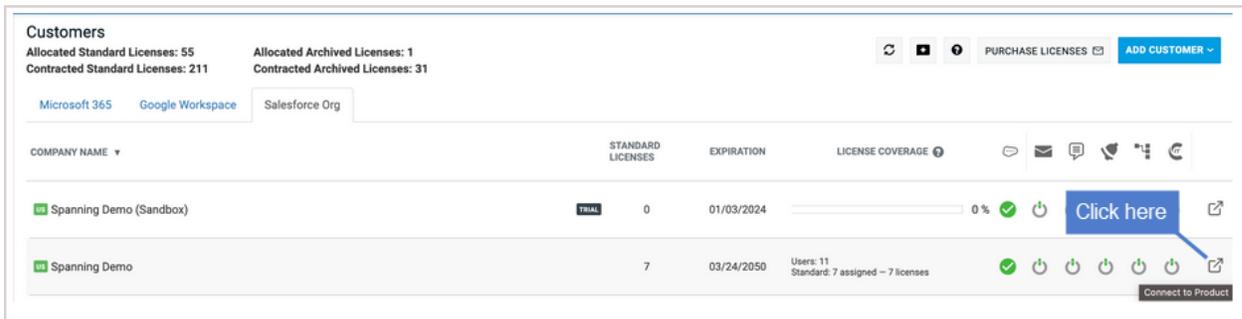
IT Complete single sign-on is configured in the Spanning Backup for Salesforce organization. Initial configuration requires access to the organization as the Spanning Administrator. The organization must already be associated with Kaseya VSA.

Use this procedure to enable login with IT Complete:

1. Log in to Spanning Backup for Salesforce as an administrator.
2. Click **Settings**.
3. In the Kaseya IT Complete Features section, check this box: **Allow Kaseya IT Complete login for administrators**.



- 4. Return to the Salesforce Backup module in Kaseya VSA and locate the organization you just enabled for login with IT Complete. Click **Connect to Product**. You are logged in to the organization with your VSA account.

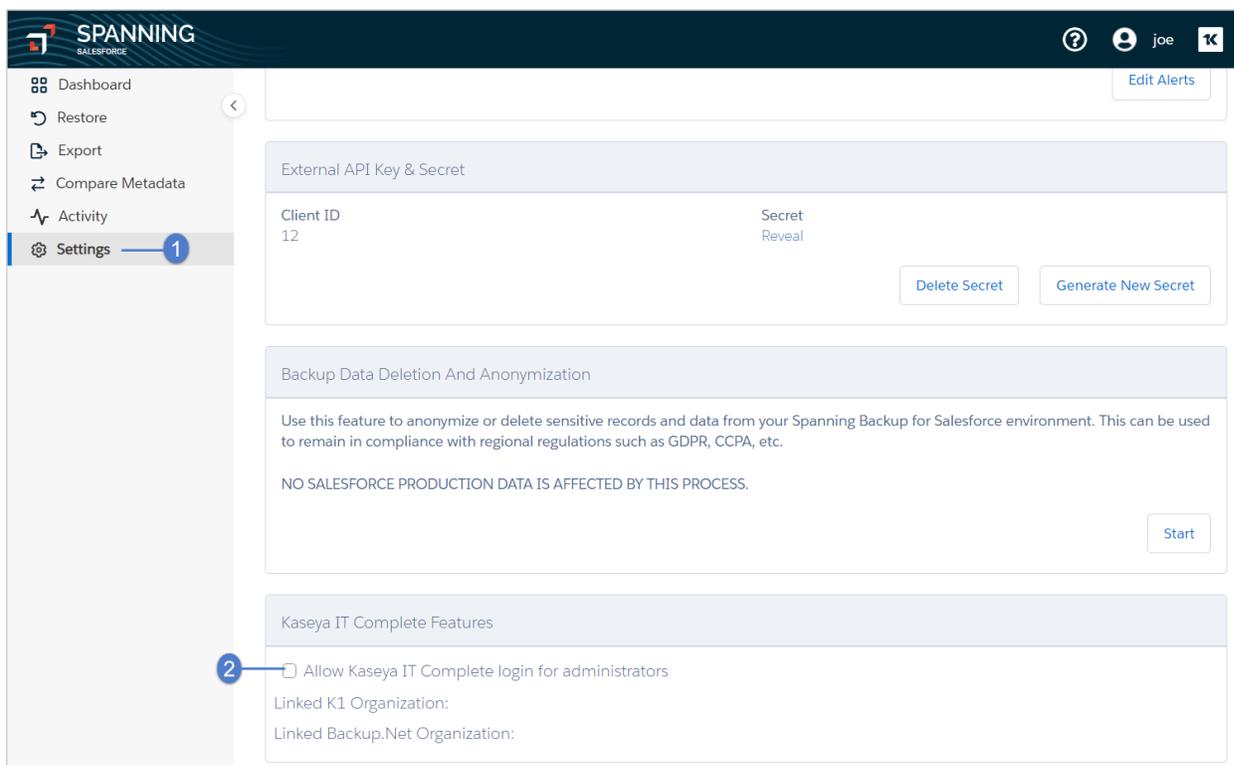


While logged in to Spanning Backup for Salesforce all activity is audited and listed in the Activity log as your VSA identity (see "Viewing Application Activity" for details).

To disable IT Complete login

Use this procedure to disable the IT Complete integration. Upon running this procedure, administrators must use their Salesforce credentials to log in to Spanning Backup for Salesforce.

1. Log in to Spanning Backup for Salesforce as an administrator.
2. Click **Settings**.
3. In the Kaseya IT Complete Features section, clear this box: **Allow Kaseya IT Complete login for administrators**.



Restoring Object Data

Once your initial backup is complete, you'll be able to use the restore and export functions in Spanning. The amount of time it takes to complete your first backup will vary according to how much data is being backed up in Salesforce.

When information is lost, your end-users and administrators can quickly find and restore data from any point-in-time backup. The speed, accuracy, and user experience for restoring data are key to keeping your organization moving forward and reducing business continuity risk.

See these topics for details:

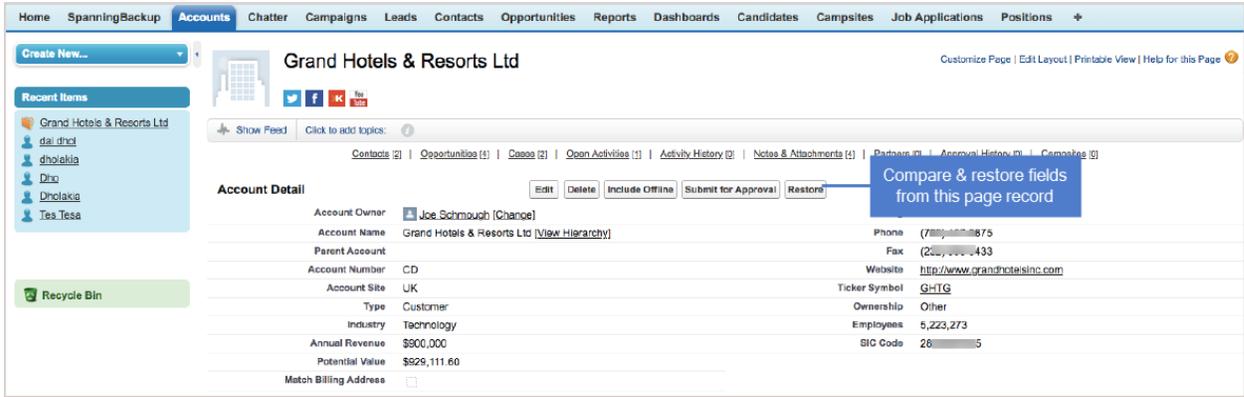
- ["Restoring object data using the Salesforce interface"](#)
- ["Restoring object data to the same organization"](#)
- ["Restoring object data to a different organization"](#)

Restoring object data using the Salesforce interface

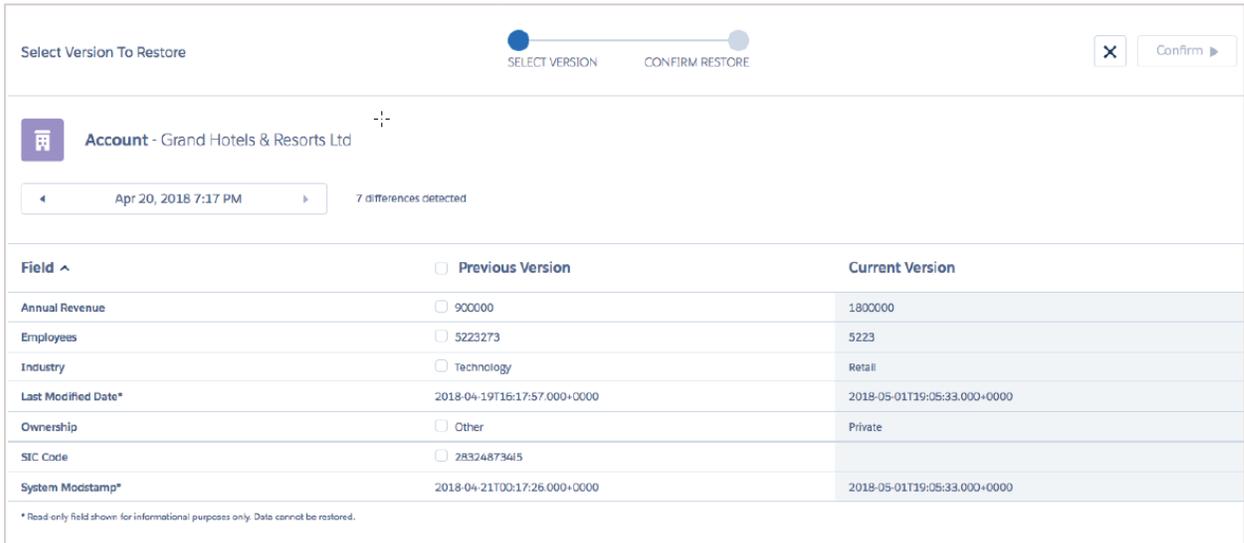
Run this procedure to restore previous versions of individual objects directly back into Salesforce:

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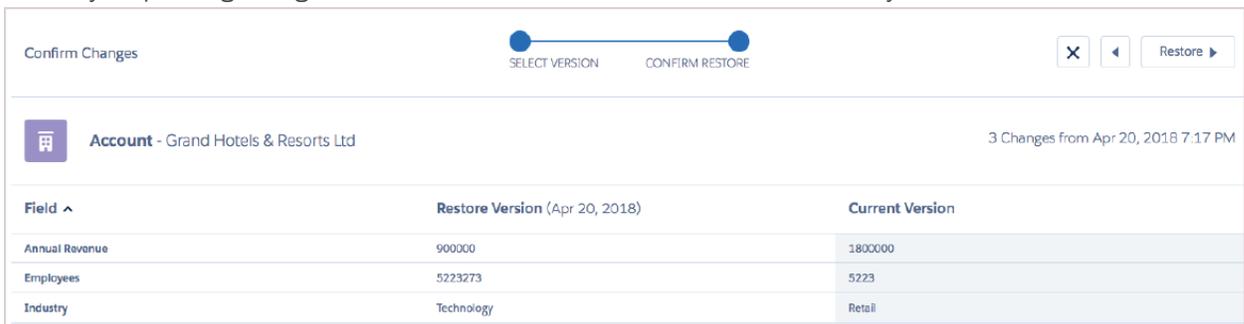
1. Log in to Spanning Backup for Salesforce and navigate to the page record whose object data you will restore.
2. Click **Restore** to initiate field-level compare and restore of Salesforce record data directly from this individual record page.



3. Select the backup date and individual fields you would like to restore. Click **Confirm**.



4. Review your pending changes. Click **Restore**. The selected data is restored into your Salesforce instance.



Restoring object data to the same organization

Spanning Backup same-org restore enables admins to undo a delete or update in bulk— quickly, easily, and automatically from a specified point in time.

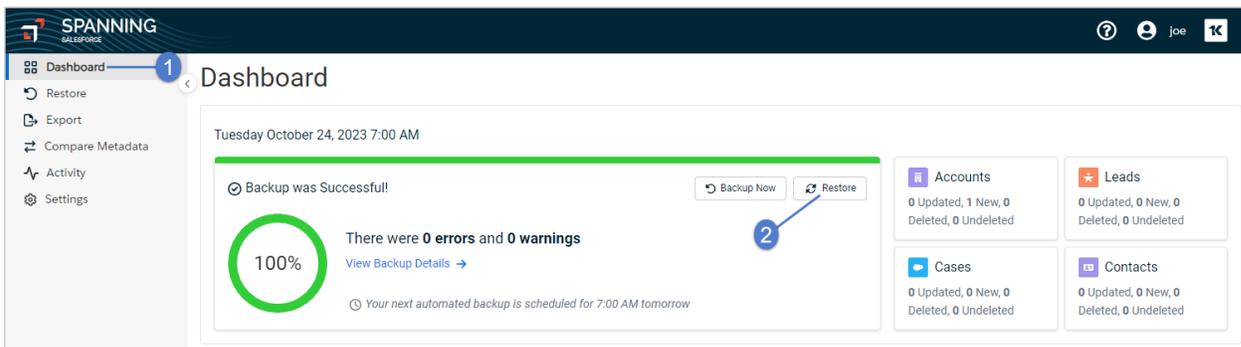
By using the UI Search method, you can restore all updated, unchanged, or deleted records in an object type at once. And you can choose whether to restore the related child-grandchild items (master-detail relationships) of any parent items. For details, see "[To restore object data to the same organization](#)".

If you know exactly which records you need to restore, you can opt to upload a CSV file containing the Salesforce IDs of these records and restore them to your Salesforce org. For details, see "[To restore to the same organization by importing a CSV file](#)".

To restore object data to the same organization

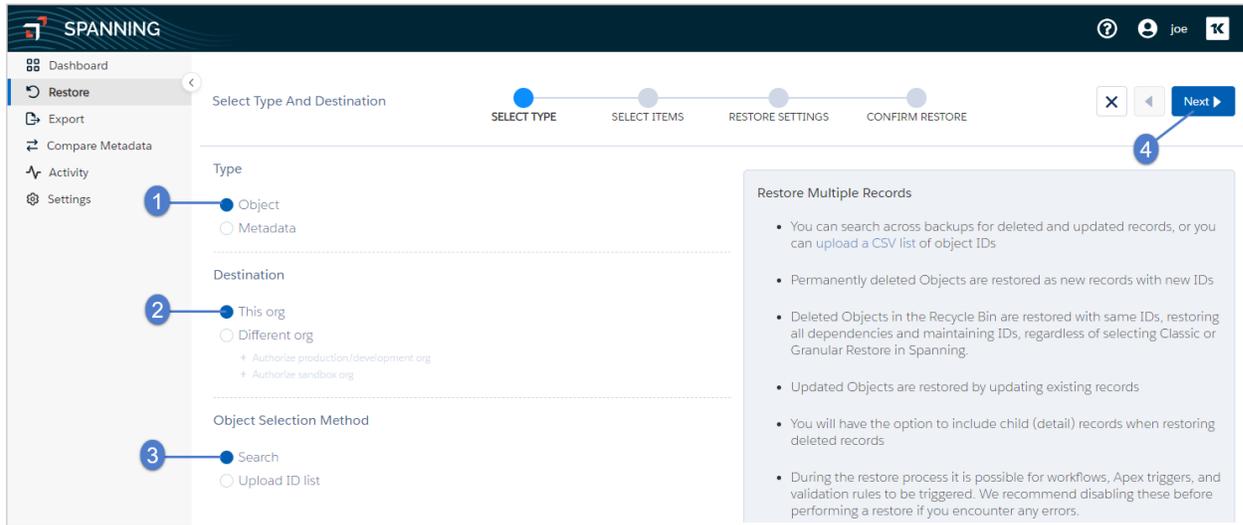
Use this procedure to restore recently updated, deleted, or unchanged records to the same organization.

1. Log in to Spanning Backup for Salesforce.
2. Click **Restore** on the main Dashboard.



3. Select **Object** as the type of data you want to restore.
4. Select **This Org** for the restore destination.
5. Ensure that **Search** is selected for the Object Selection Method.

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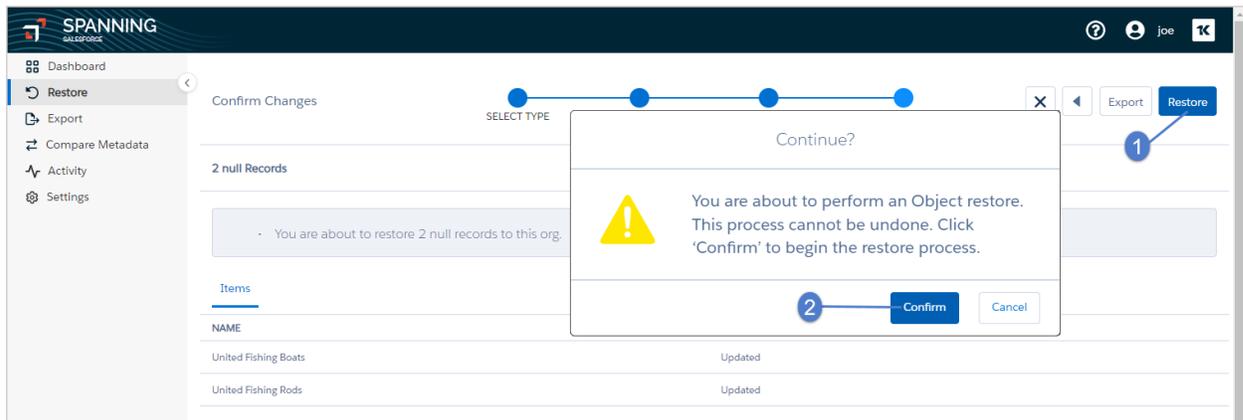
6. Click **Next**.

7. Select a date range and whether you want to display items that were Updated, Deleted, New or Updated, or Unchanged since the first backup selected.
8. Select the object types that you want to restore:
 - To restore an entire object, select its checkbox.
 - To restore selected items, click the object type but do not select its checkbox.
 - In our example, we are recovering updated items from the Account object type.
9. (If applicable) Select the items that you would like to restore. You can select as many items as you like. Additionally, you can preview any item by clicking the **Preview** button before you restore the data. (To display the Preview button, hover the mouse over a row. The button displays on the right.)
10. Choose whether to include child objects during restore.
11. Choose whether to restore or repair lookup relationships during restore. When records are restored, they generate a new Salesforce ID. This feature attempts to repair or update any lookup relationships that were referencing the record prior to restore.

12. Click **Next**.

13. (Optional) To overwrite any of the field values during the restore, check the **Overwrite field values during the restore process** option. Select the fields that you want to overwrite and then input the values you want inserted. Alternatively, you can choose **Saved Preset** if you would like to reuse saved overwrite values or **Save Preset** to save the new values you enter.
14. (Optional) To restore specific fields for updated records instead of restoring all fields, check the **Restore specific fields of updated records** option. Then, select the object type and fields that you want to restore. (This applies only if a record contains updatable fields.)
15. Click **Next**.

16. Review the pending changes. Click **Restore**. Click **Confirm**. The selected data is restored to your Salesforce instance.

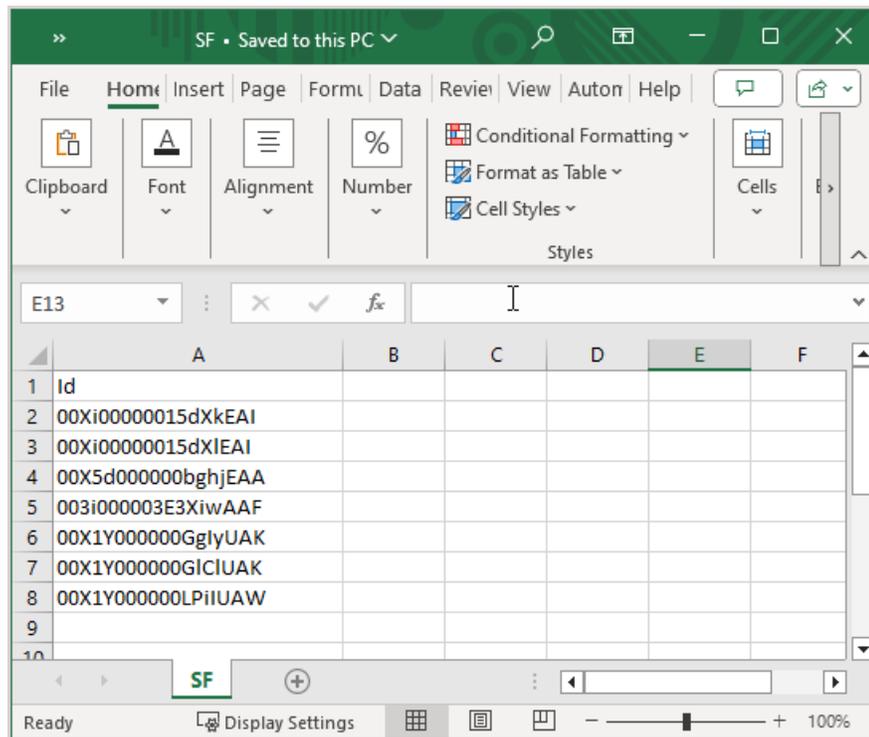


To restore to the same organization by importing a CSV file

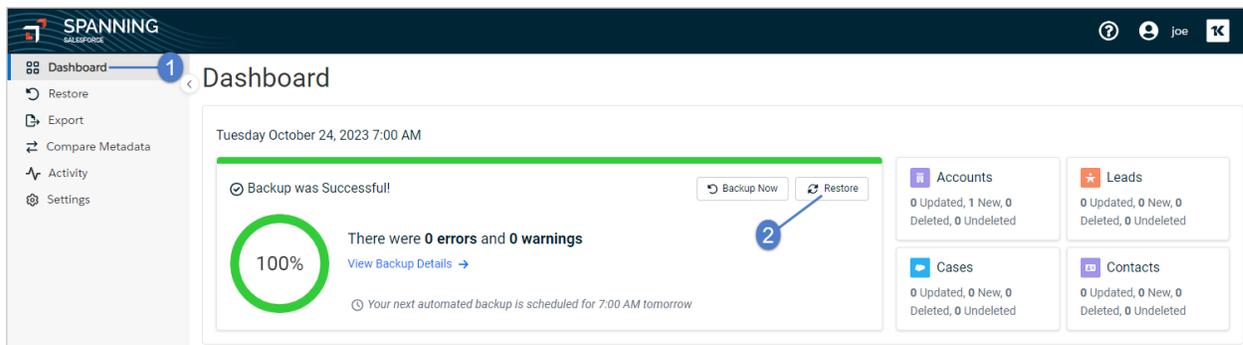
If you have run a process in your Salesforce environment that has updated the records for many fields in error, and you know exactly which records were affected and which records you need to restore, you can upload a CSV containing the IDs of the affected Salesforce records to perform a bulk restore. A single CSV file can have IDs of different object types, such as accounts, contacts, notes, and opportunities.

To restore to the same org by importing a CSV file:

1. Prepare your CSV file to match the format in the figure below.
 - The CSV must contain a column with a header of **Id** (no quotes, not case-sensitive). The CSV can contain other columns if you'd like— Spanning Backup will only use the ID column and will ignore any other columns.
 - In the **Id** column, list all of the Salesforce IDs that you want to restore. The IDs can be records of any object type. All Salesforce IDs to be loaded should be 18 characters long. The maximum file size allowed is 100MB.

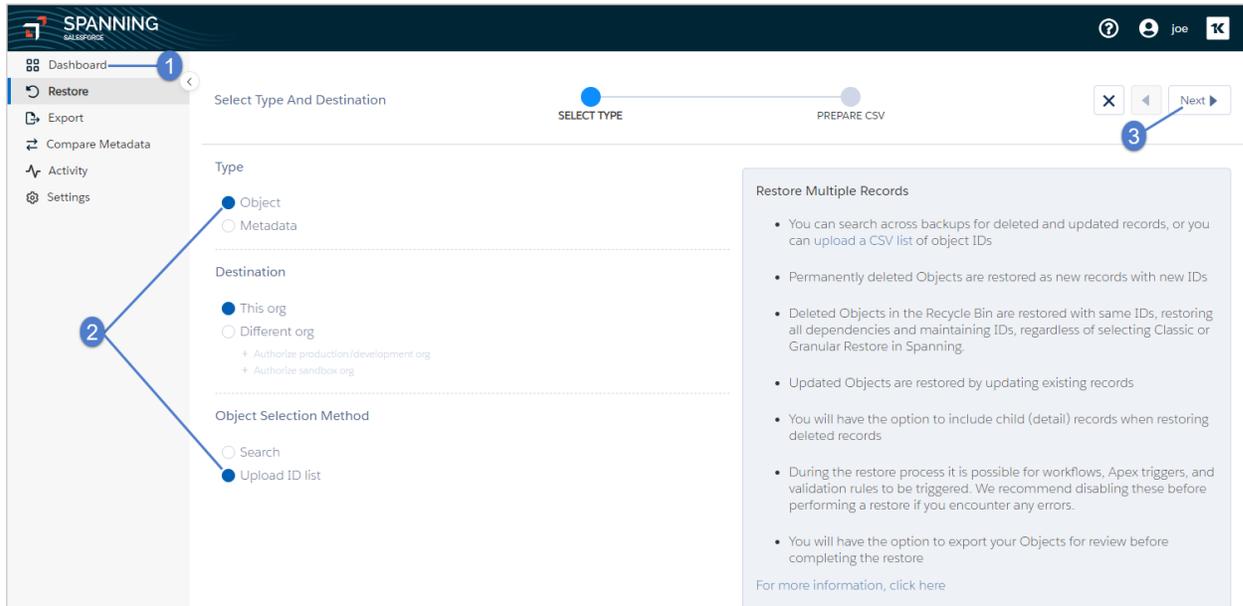
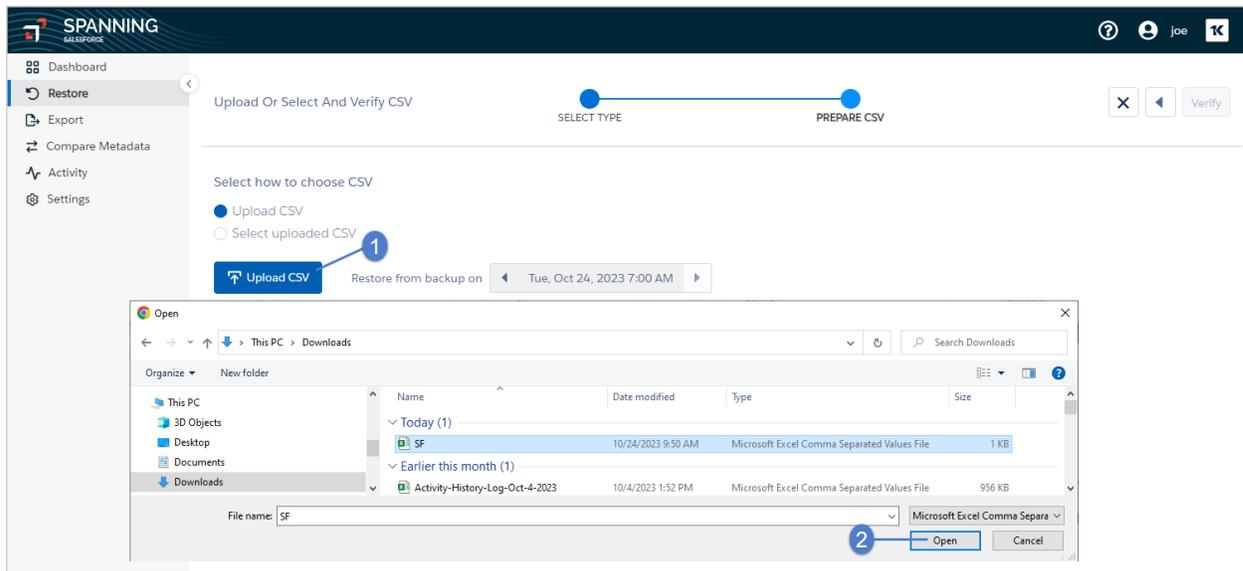


2. Log in to Spanning Backup for Salesforce.
3. Click **Restore** on the main Dashboard.



4. Select **Object** as the type of data you want to restore.
5. Select **This Org** for the restore destination.
6. Select **Upload ID List** for the object selection method.

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7. Click **Next**.8. Click **Upload CSV**. Browse to upload your CSV file.

9. Select the backup to restore from.

10. Verify your CSV file. When verification is complete, you are notified via email and Chatter (if enabled).

The first screenshot shows the 'Upload Or Select And Verify CSV' page in the Spanning Salesforce interface. The page has a progress bar at the top with two steps: 'SELECT TYPE' and 'PREPARE CSV'. A 'Verify' button is visible in the top right corner, with a blue circle and the number '2' pointing to it. Below the progress bar, there are radio buttons for 'Upload CSV' (selected) and 'Select uploaded CSV'. A date selector is shown with 'Wed, Oct 18, 2023 10:06 AM' selected, with a blue circle and the number '1' pointing to it. Below the date selector, there are instructions for Step 1 and Step 2, and a 'Verify' button.

The second screenshot shows the 'CSV VERIFICATION' page. A large white box in the center of the page contains a loading spinner and the text 'Verifying List'. Below the spinner, there is a message: 'You can choose to wait here while the verification is running, or navigate back to the Spanning Dashboard. You will be notified via email and Chatter when the verification completes.' A 'Go To Dashboard' button is located at the bottom of the white box. The 'Verify' button from the previous screenshot is still visible in the top right corner.

You can wait on the CSV Verification page while the file is being verified or access the restore from the Dashboard or by clicking the link provided in the email or Chatter notification. To access the restore from the Dashboard, click the **CSV Verification** row in the Recent Activity:

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The screenshot shows the SPANNING Salesforce Admin Dashboard. The main heading is "Dashboard" with a timestamp of "Tuesday October 24, 2023 7:00 AM". A large green circle indicates "Backup was Successful!" with "100%" completion. Below this, it states "There were 0 errors and 0 warnings" and "Your next automated backup is scheduled for 7:00 AM tomorrow". On the right, there are four summary cards for Accounts, Leads, Cases, and Contacts, each showing 0 Updated, 0 New, and 0 Deleted/Undeleted records. Below these is a "Last 30 Backups" section with a progress bar and a "Backup History" button. To the right is a "Subscription" section showing an expiration date of 3/24/50, 7 licenses purchased, and 12 users, with a "Not Enough Licenses" warning. At the bottom, the "Recent Activity" section shows a "CSV Verification" activity completed successfully at 10:33 AM on October 24, 2023.

11. Confirm that all of the correct records have been selected.
 - If an object ID could not be found in the backup, it is not included in the restore. You can opt to download a CSV list of any missing records by clicking **Download List**.
 - You can preview any item by clicking the **Preview** button before you restore the data. (To display the Preview button, hover the mouse over a row. The button displays on the right.)
12. Click **Next**.

The screenshot shows the SPANNING Salesforce Admin Restore interface. The main heading is "Restore" with a sub-heading "Select Items To Restore". A progress bar at the top indicates the current step is "SELECT ITEMS", with "RESTORE SETTINGS" and "CONFIRM RESTORE" as subsequent steps. A "Next" button is highlighted with a blue circle and a "2" label. Below the progress bar, the interface shows "SF.csv" and "Restore records from backup on Wed, Oct 18, 2023 10:06 am". A warning message states "1 IDs not found" and provides a "Download List" button. A table lists several email templates with checkboxes for selection. A "Preview" button is visible on the right side of the table. A blue circle with a "1" label points to the "Review the objects that will be restored" button.

NAME	OBJECT ID	OBJECT TYPE
Communities: One-Time Password Email	00X1Y000000GjlyUAK	EmailTemplate
Experience Cloud: One-Time Password Email for Headless Forgot Password Verification	00X5d000000bgjhEAA	EmailTemplate
SUPPORT: Self-Service Reset Password (SAMPLE)	00X000000015dXIEAI	EmailTemplate
SUPPORT: Self-Service New User Login (SAMPLE)	00X000000015dXKEAI	EmailTemplate
Communities: User Verification Email	00X1Y000000GICUAK	EmailTemplate
Communities: User Lockout Email	00X1Y000000LPIUUAW	EmailTemplate

13. Select optional restore settings:
 - To include child objects during restore, check the **Include children of deleted records** option.
 - To restore specific fields for updated records instead of restoring all fields, select the **Restore specific fields of updated records** option. Then, select the object type and fields that you want to restore. (This applies only if a record contains updatable fields.)

- To overwrite any of the field values during the restore, check the **Overwrite field values during the restore process** option. Select the fields that you want to overwrite and then input the values you want inserted. Alternatively, you can choose **Saved Preset** if you would like to reuse saved overwrite values or **Save Preset** to save the new values you enter.
- To restore or repair lookup relationships, select the **Restore Lookup Relationships** option. When records are restored, they generate a new Salesforce ID. This feature attempts to repair or update any lookup relationships that were referencing the record prior to restore.

14. Click **Next**.

The screenshot shows the 'Select Restore Settings' screen in the Spanning Salesforce interface. The progress bar at the top indicates the current step is 'RESTORE SETTINGS'. A 'Next' button is highlighted with a blue circle and arrow labeled '2'. A '1' points to the 'Overwrite field values during the restore process' checkbox. A 'Related Object Types' dialog box is open, showing a list of object types for EmailTemplate records:

- OwnerId -> User
- FolderId -> Folder FolderId -> Organization FolderId -> User
- BrandTemplateId -> BrandTemplate

15. Click **Restore**. Click **Confirm**. Data is restored into your active Salesforce account.

The screenshot shows the 'Confirm Changes' screen in the Spanning Salesforce interface. The progress bar at the top indicates the current step is 'CONFIRM RESTORE'. A 'Restore' button is highlighted with a blue circle and arrow labeled '2'. A '1' points to a summary box stating 'You are about to restore 6 EmailTemplate records to this org.' A 'Continue?' dialog box is open, asking for confirmation to proceed with the restore process. A '3' points to the 'Confirm' button in the dialog.

NAME
Communities: User Lockout Email
Communities: One-Time Password Email
Communities: User Verification Email
Experience Cloud: One-Time Password Email for Headless Forgot Password Verification
SUPPORT: Self-Service Reset Password (SAMPLE)
SUPPORT: Self-Service New User Login (SAMPLE)

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Restoring object data to a different organization

Spanning Backup bulk restore to a different org enables admins to restore object data to a different production, development, or sandbox org in bulk— quickly, easily, and automatically from a specified point in time.

Start by reviewing the "[Prerequisites for restoring to a different organization](#)". Then restore data using one of these methods:

- UI Search – Use to restore all updated, unchanged, or deleted records in an object type at once. For details, see "[To restore recently updated, deleted, or unchanged records to a different org](#)".
- Upload CSV file – If you know exactly which records you need to restore, you can opt to upload a CSV file containing the Salesforce IDs of these records and restore them to another production, development, or sandbox Salesforce instance. For details, see "[To restore to a different org by uploading a CSV file](#)".

Prerequisites for restoring to a different organization

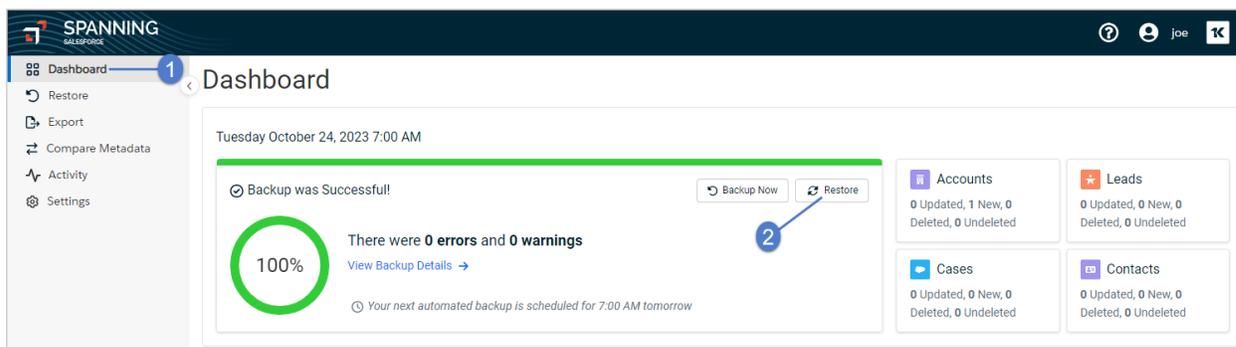
Before restoring, ensure that these requirements have been met:

- Ensure that the destination org is setup with the same customizations and metadata as the source org.
- Disable workflows, Apex triggers, and validation rules for the destination org.
- Ensure that the destination org has enough storage space to accommodate the data you select from the source org.
- Confirm that you are authenticated and have **Modify All Data** permission for the destination org.

To restore recently updated, deleted, or unchanged records to a different org

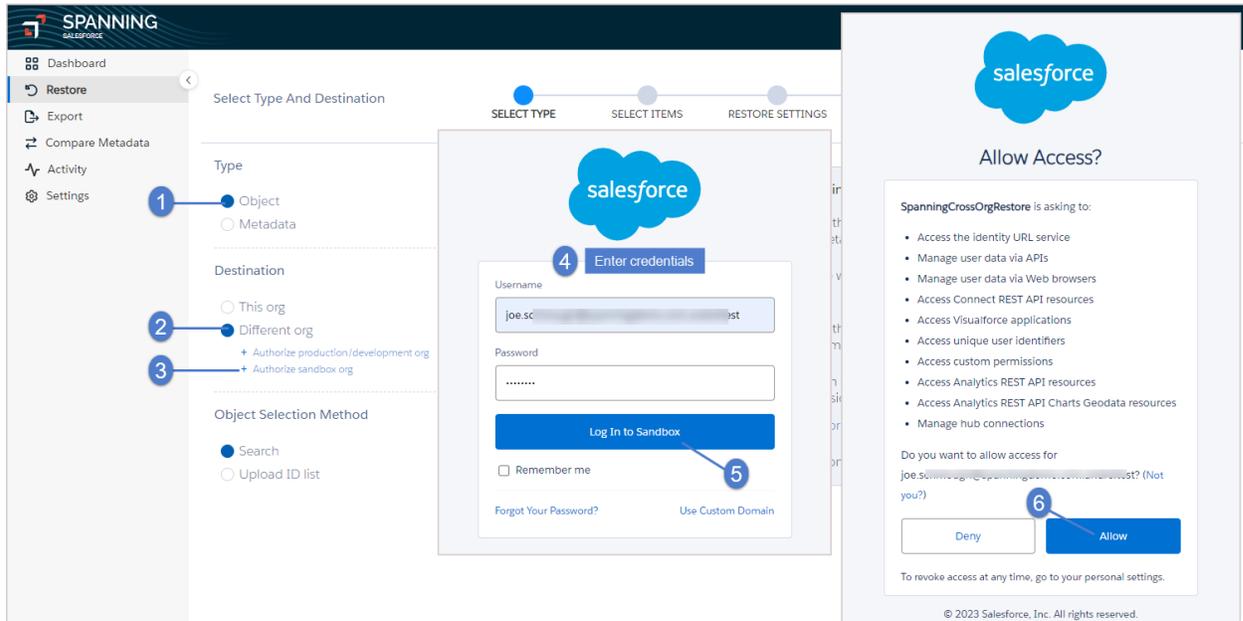
Use this procedure to restore object data to a different organization by using the UI Search method.

1. Log in to Spanning Backup for Salesforce.
2. Click **Restore** on the main Dashboard.

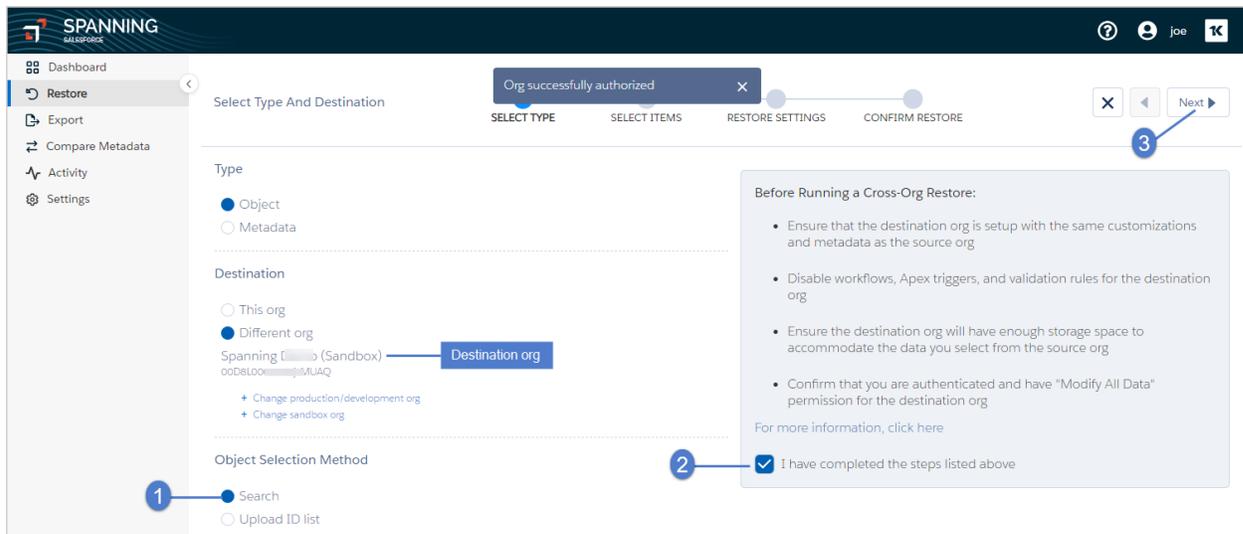


3. Select **Object** as the type of data you want to restore.
4. Select **Different Org** for the restore destination, then click the applicable **Authorize Org** link below to select the destination org.
5. When prompted, enter the login credentials for your destination org. Click **Log In**.

- Click **Allow** to grant access.



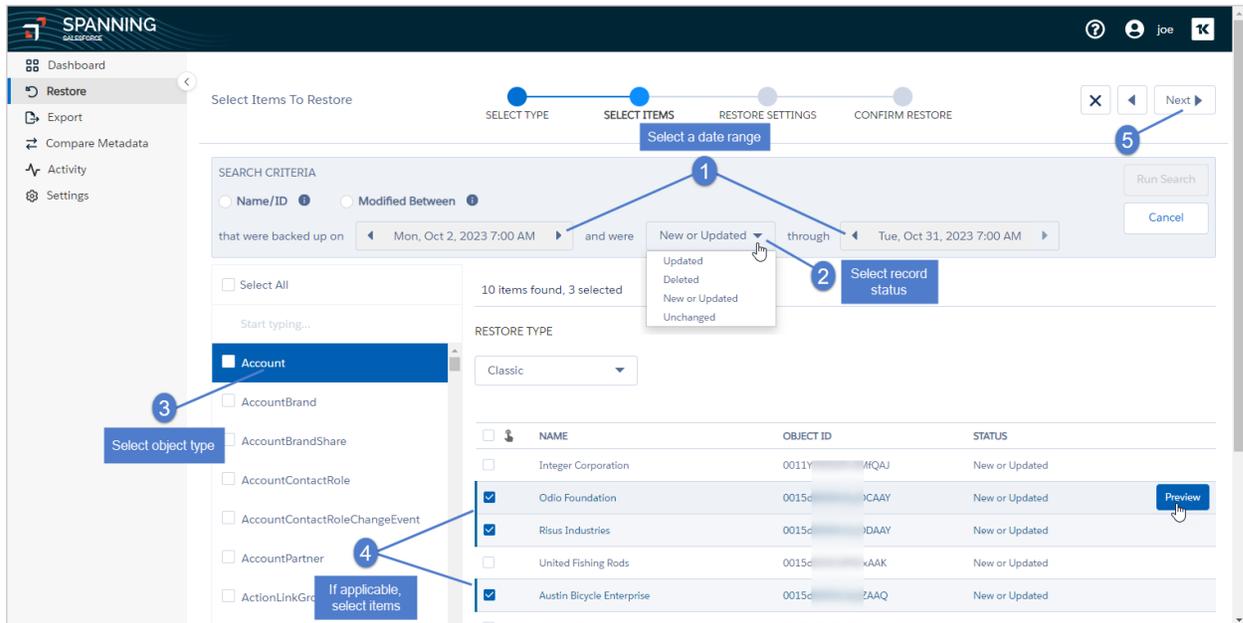
- Ensure that **Search** is selected for the Object Selection Method.
- Confirm that prerequisites in the Before Running a Cross-Org Restore list have been met by checking the **I have completed the steps listed above** box.
- Click **Next**.



- Select a date range and whether you want to display items that were Updated, Deleted, New or Updated, or Unchanged since the first backup selected.
- Select the object types that you want to restore:
 - To restore an entire object, select its checkbox.
 - To restore selected items, click the object type but do not select its checkbox.

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- In our example, we are recovering updated items from the Account object type.
- (If applicable) Select the items that you would like to restore. You can select as many items as you like. Additionally, you can preview any item by clicking the **Preview** button before you restore the data. (To display the Preview button, hover the mouse over a row. The button displays on the right.)
 - Click **Next**.



- (Optional) To overwrite any of the field values during the restore, check the **Overwrite field values during the restore process** option. Select the fields that you want to overwrite and then input the values you want inserted. Alternatively, you can choose **Saved Preset** if you would like to reuse saved overwrite values or **Save Preset** to save the new values you enter.

15. Click **Next**.

SPANNING SALESFORCE

Dashboard

Restore

Export

Compare Metadata

Activity

Settings

Select Restore Settings

SELECT TYPE SELECT ITEMS RESTORE SETTINGS CONFIRM RESTORE

3 Account Records - Odio Foundation, Risus Industries, Austin B...

Overwrite field values during the restore process
Replace field values for specific fields of Object Types during the restore process.

Create New Saved Preset

Account AccountSource Specific Value Web

Search Values

Advertisement
Employee Referral
External Referral
Partner
Public Relations
Seminar - Internal
Seminar - Partner
Trade Show
Web
Word of Mouth
Other

Save As Preset

Related Object Types

Below is the list of related object types for the items chosen to restore. Your restore may run into errors if the related records do not exist in the Salesforce org.

Account (5)

- ParentId -> Account
- OwnerId -> User
- PartnerManager__c -> Contact
- Contact__c -> Contact
- Campaign__c -> Campaign

16. Review the pending changes. Click **Restore**. Click **Confirm**. The selected data is restored to the destination org.

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Confirm Changes

SELECT TYPE SELECT ITEMS RESTORE SETTINGS CONFIRM RESTORE

Continue?

You are about to perform an Object restore. This process cannot be undone. Click 'Confirm' to begin the restore process.

Confirm Cancel

NAME	STATUS
Austin Bicycle Enterprise	New or Updated
Risus Industries	New or Updated
Odlio Foundation	New or Updated

Dashboard

Tuesday October 31, 2023 7:00 AM

Backup was Successful!

There were 0 errors and 0 warnings

100%

Your next automated backup is scheduled for 7:00 AM tomorrow

Accounts: 1 Updated, 0 New, 0 Deleted, 0 Undeleted

Leads: 0 Updated, 0 New, 0 Deleted, 0 Undeleted

Cases: 0 Updated, 0 New, 0 Deleted, 0 Undeleted

Contacts: 0 Updated, 0 New, 0 Deleted, 0 Undeleted

Subscription: Not Enough Licenses

Expiration Date: 3/24/50

Licenses Purchased: 7

Users: 12

In-Preparing

Multi-Record Restore running

Cross-org restore is running

0%

17. When the restore is complete, you are notified via email and Chatter (if enabled). View the restore results on the Dashboard by clicking the **Cross-Org Restore** row in the Recent Activity.

The screenshot displays the Spanning Backup for Salesforce Admin Dashboard. The main heading is "Dashboard" with a timestamp of "Tuesday October 31, 2023 7:00 AM". A large green circle indicates "100%" completion, with the message "Backup was Successful!". Below this, it states "There were 0 errors and 0 warnings" and "Your next automated backup is scheduled for 7:00 AM tomorrow". A "Backup Now" button and a "Restore" button are visible. The dashboard includes several summary cards: "Accounts" (1 Updated, 0 New, 0 Deleted, 0 Undeleted), "Leads" (0 Updated, 0 New, 0 Deleted, 0 Undeleted), "Cases" (0 Updated, 0 New, 0 Deleted, 0 Undeleted), and "Contacts" (0 Updated, 0 New, 0 Deleted, 0 Undeleted). A "Subscription" card shows "Not Enough Licenses" with details: Expiration Date 3/24/50, Licenses Purchased 7, and Users 12. The "Last 30 Backups" section shows a row of 30 green bars, with the most recent one highlighted. The "Recent Activity" table shows a successful restore operation:

Date	Activity	User	Status
Tue, October 31, 2023 01:13 PM	✓ Cross-Org Restore	joe. o.com	Success

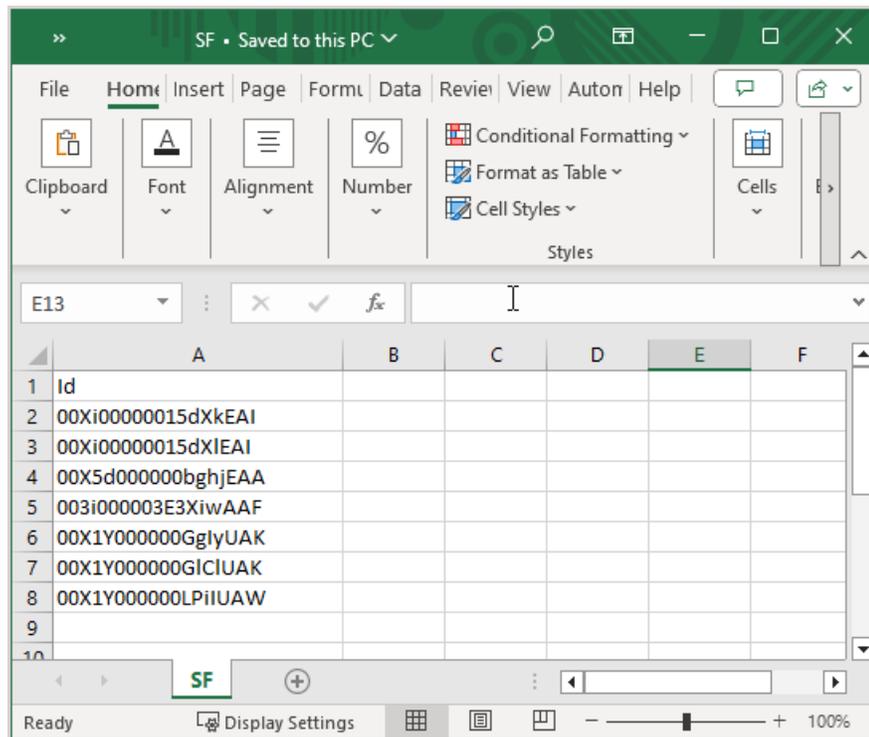
To restore to a different org by uploading a CSV file

If you have run a process in your Salesforce environment that has updated the records for many fields in error, and you know exactly which records were affected and which records you need to restore, you can upload a CSV containing the IDs of the affected Salesforce records to perform a bulk restore. A single CSV file can have IDs of different object types, such as accounts, contacts, notes, and opportunities.

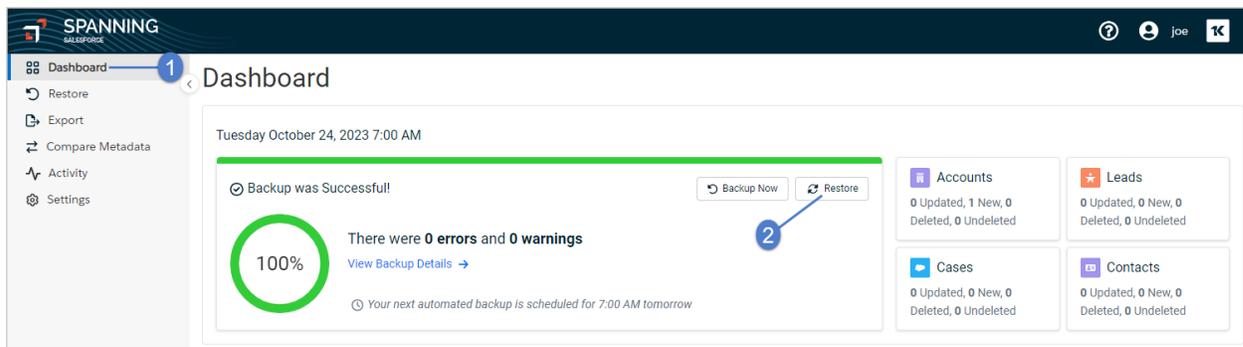
To restore to a different org by importing a CSV file:

1. Prepare your CSV file to match the format in the figure below.
 - The CSV must contain a column with a header of **Id** (no quotes, not case-sensitive). The CSV can contain other columns if you'd like— Spanning Backup will only use the ID column and will ignore any other columns.
 - In the **Id** column, list all of the Salesforce IDs that you want to restore. The IDs can be records of any object type. All Salesforce IDs to be loaded should be 18 characters long. The maximum file size allowed is 100MB.

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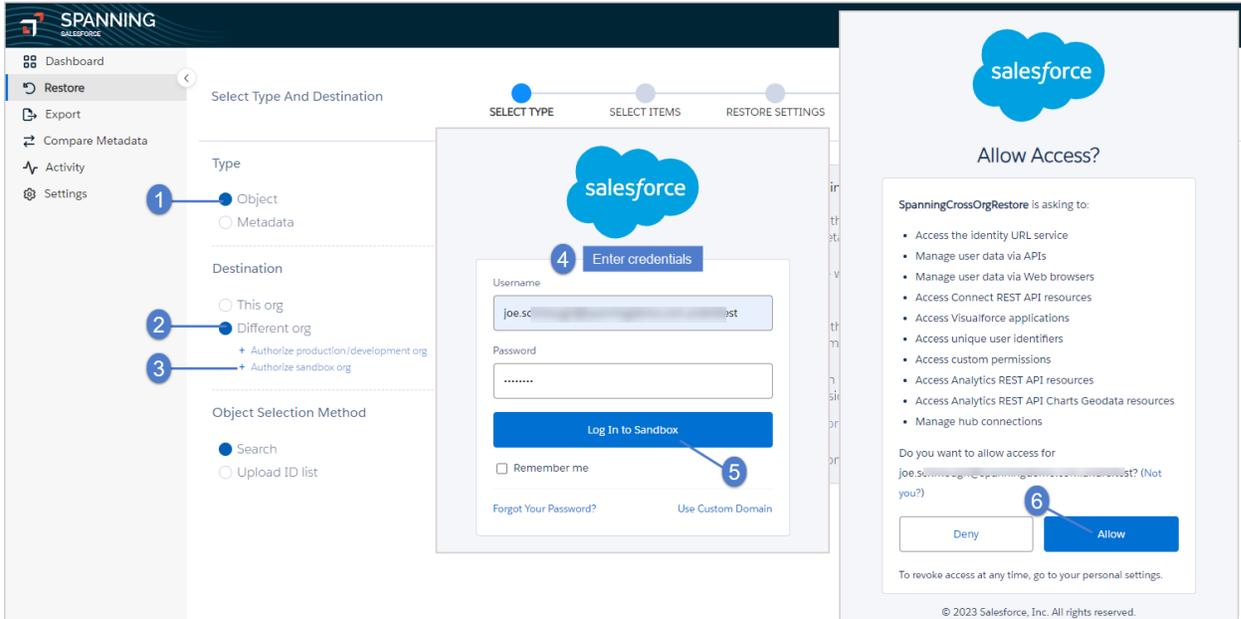


2. Log in to Spanning Backup for Salesforce.
3. Click **Restore** on the main Dashboard.

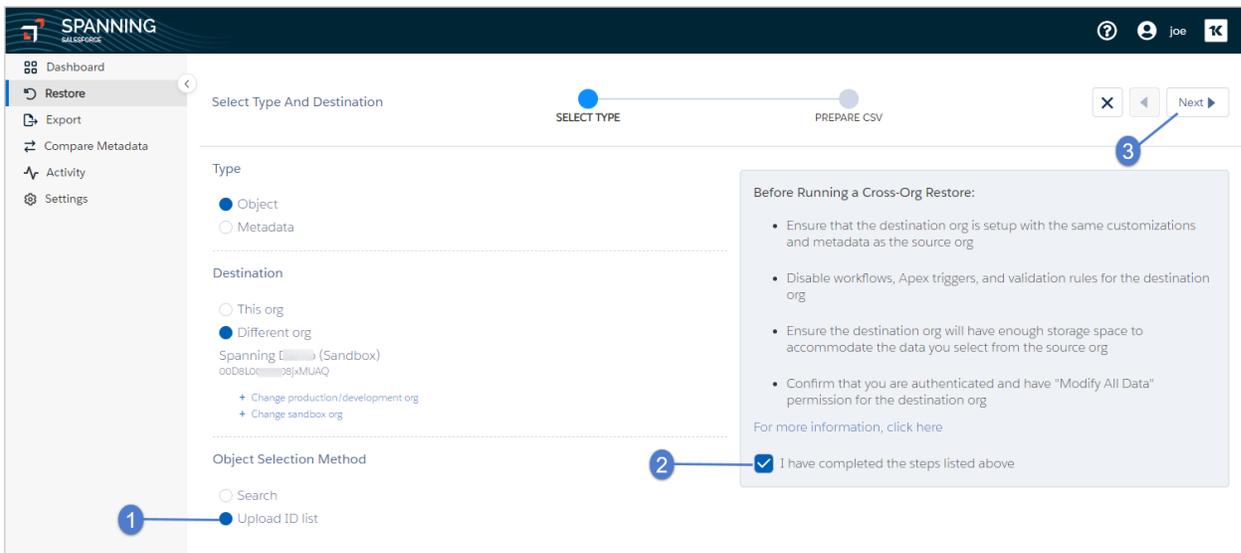


4. Select **Object** as the type of data you want to restore.
5. Select **Different Org** for the restore destination, then click the applicable **Authorize Org** link below to select the destination org.
6. When prompted, enter the login credentials for your destination org. Click **Log In**.

- Click **Allow** to grant access.

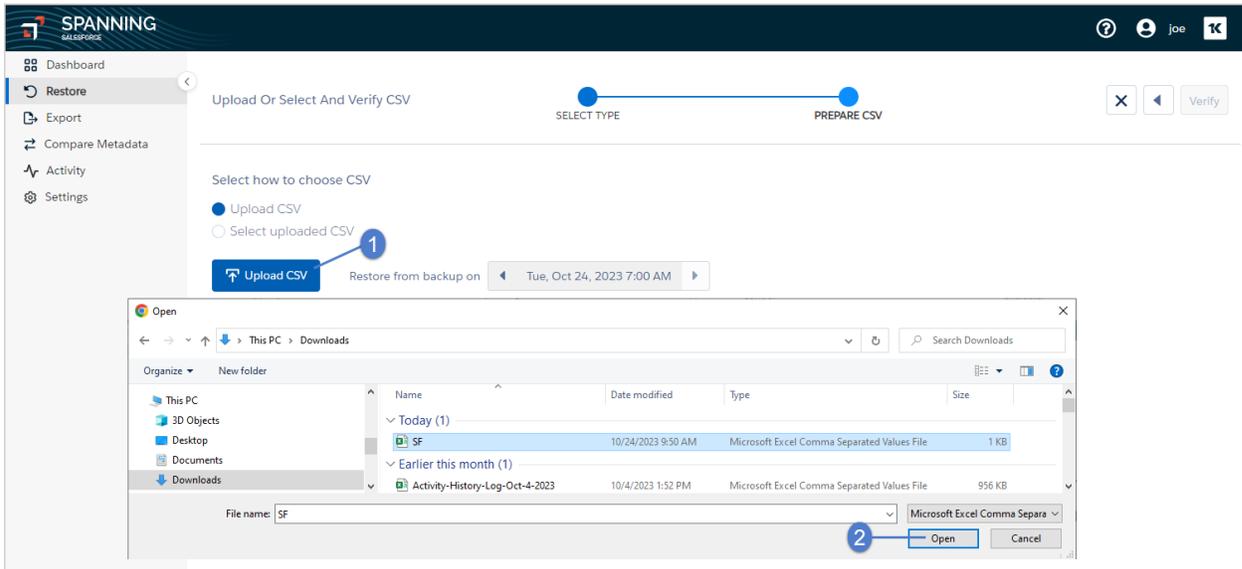


- Select **Upload ID list** for the Object Selection Method.
- Confirm that prerequisites in the Before Running a Cross-Org Restore list have been met by checking the **I have completed the steps listed above** box.
- Click **Next**.

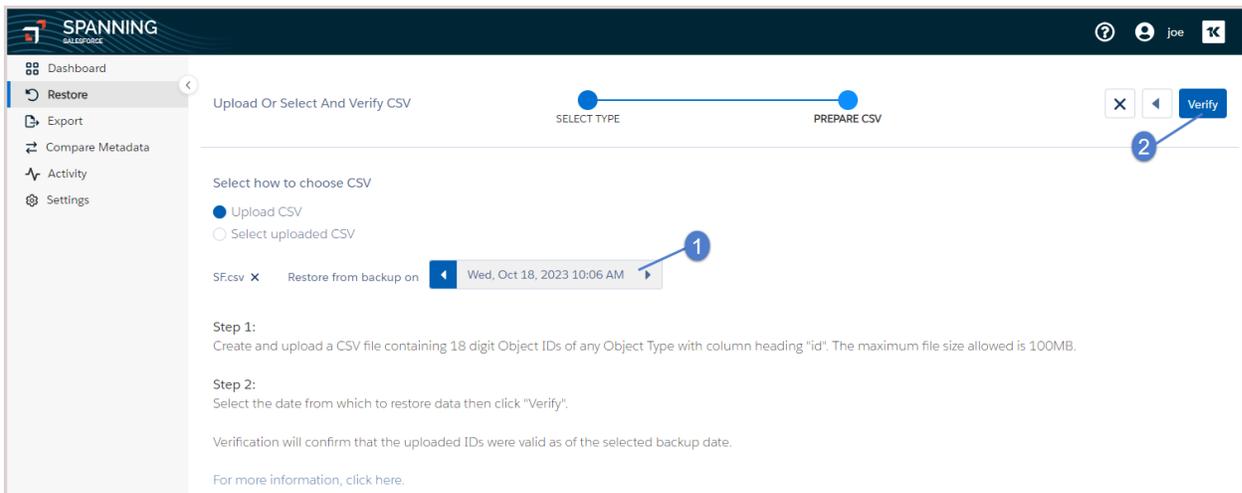


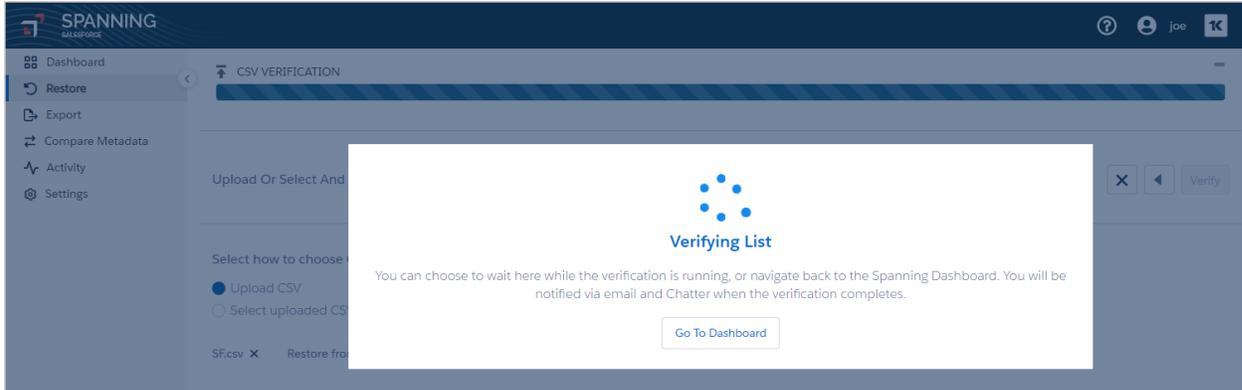
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11. Click **Upload CSV**. Browse to upload your CSV file.

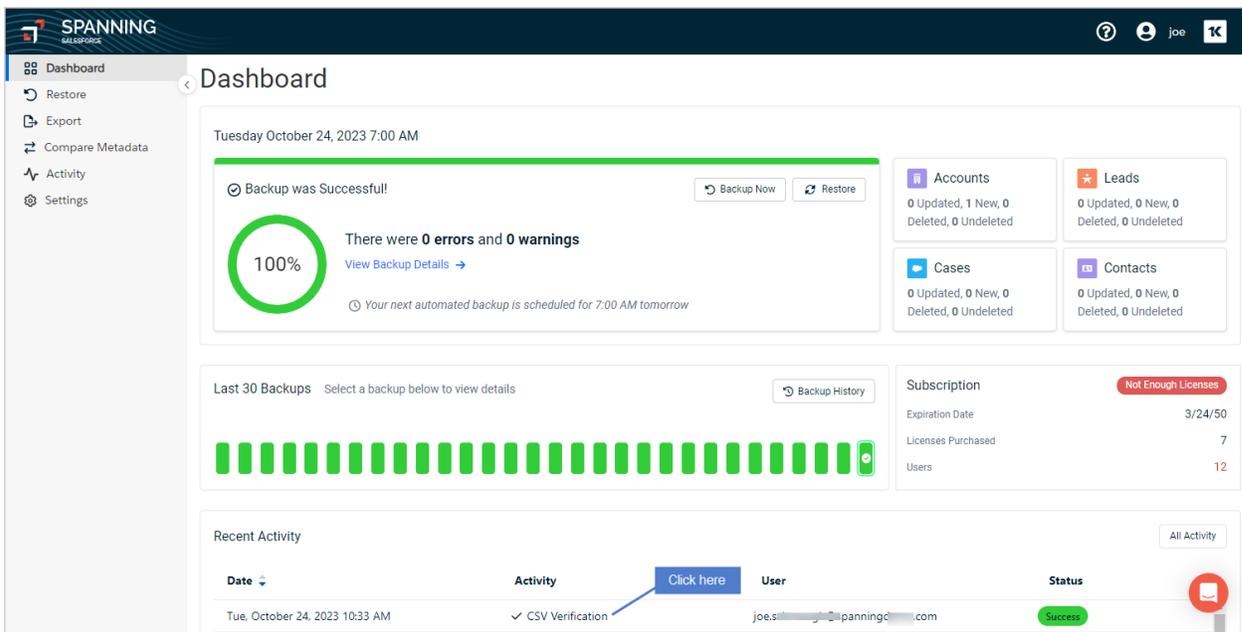


12. Select the backup to restore from.
13. Verify your CSV file. When the verification is complete, you are notified via email and Chatter (if enabled).





You can wait on the CSV Verification page while the file is being verified or access the verify operation later from the Dashboard or by clicking the link provided in the email or Chatter notification. To view verification details from the Dashboard, click the **CSV Verification** row in the Recent Activity:



14. Confirm that all of the correct records have been selected.
 - If an object ID could not be found in the backup, it is not included in the restore. You can opt to download a CSV list of any missing records by clicking **Download List**.
 - You can preview any item by clicking the **Preview** button before you restore the data. (To display the Preview button, hover the mouse over a row. The button displays on the right.)
15. Click **Next**.

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SPANNING SALESFORCE

Dashboard

Restore

Export

Compare Metadata

Activity

Settings

Select Items To Restore

SELECT ITEMS RESTORE SETTINGS CONFIRM RESTORE

Sf.csv Restore records from backup on Wed, Oct 18, 2023 10:06 am to Spanning

D (Sandbox)

1 IDs not found
Download a list of object IDs not found in the selected backup

Review the objects that will be restored

Download a CSV of IDs that did not match records in the selected backup

Download List

NAME	OBJECT ID	OBJECT TYPE
Communities: One-Time Password Email	00X1Y000000GlyUAK	EmailTemplate
Experience Cloud: One-Time Password Email for Headless Forgot Password Verification	00X5d000000bghjEAA	EmailTemplate
SUPPORT: Self-Service Reset Password (SAMPLE)	00X00000015dXIEA1	EmailTemplate
SUPPORT: Self-Service New User Login (SAMPLE)	00X00000015dXKEA1	EmailTemplate
Communities: User Verification Email	00X1Y000000GICUAK	EmailTemplate
Communities: User Lockout Email	00X1Y000000LPIUAW	EmailTemplate

16. Select optional restore settings:

- To include child objects during restore, check the **Include children** option.
- To overwrite any of the field values during the restore, check the **Overwrite field values during the restore process** option. Select the fields that you want to overwrite and then input the values you want inserted. Alternatively, you can choose **Saved Preset** if you would like to reuse saved overwrite values or **Save Preset** to save the new values you enter.

17. Click **Next**.

SPANNING SALESFORCE

Dashboard

Restore

Export

Compare Metadata

Activity

Settings

Select Restore Settings

SELECT ITEMS RESTORE SETTINGS CONFIRM RESTORE

6 EmailTemplate Records - SUPPORT: Self-Service Reset Password (SA...

Include children
When restoring records, also restore related children and grandchildren.

Overwrite field values during the restore process
Replace field values for specific fields of Object Types during the restore process.

Select optional settings

Create New Saved Preset Haymarket

Account Name Specific Value Haymarket Demo

Account BillingCity Specific Value NYC

Account BillingLatitude Specific Value dsadad

Save Delete

Related Object Types

Below is the list of related object types for the items chosen to restore. Your restore may run into errors if the related records do not exist in the Salesforce org.

EmailTemplate (3)

- OwnerId -> User
- FolderId -> Folder FolderId -> Organization FolderId -> User
- BrandTemplateId -> BrandTemplate

18. Click **Restore**. Click **Confirm**. Data is restored to the selected organization.

The screenshot shows the 'Confirm Restore' step in the Spanning Backup for Salesforce Admin interface. A modal dialog is displayed with a warning icon and the text: "Continue?" "You are about to perform an Object restore. This process cannot be undone. Click 'Confirm' to begin the restore process." A blue arrow labeled '1' points to the 'Restore' button in the top right, and another blue arrow labeled '2' points to the 'Confirm' button in the modal dialog. Below the modal is a table of 6 EmailTemplate records.

NAME	OBJECT ID
Communities: User Lockout Email	00X1YC...tIUAW
Communities: One-Time Password Email	00X1YC...gJyUAK
Communities: User Verification Email	00X1YC...CIUAK
Experience Cloud: One-Time Password Email for Headless Forgot Password Verification	00X5d...jhEAA
SUPPORT: Self-Service Reset Password (SAMPLE)	00X100...XIEAT
SUPPORT: Self-Service New User Login (SAMPLE)	00X100...XkEAT

19. When the restore is complete, you are notified via email and Chatter (if enabled). View the restore results on the Dashboard by clicking the **Cross-Org Restore** row in the Recent Activity.

The screenshot shows the Spanning Backup for Salesforce Admin Dashboard. The main section shows "Backup was Successful!" with a 100% progress indicator and "There were 0 errors and 0 warnings". Below this is a "Last 30 Backups" section with a progress bar and a "Subscription" section with "Not Enough Licenses" warning. The "Recent Activity" section shows a row for "Cross-Org Restore" with a blue arrow pointing to the "Click here" link.

Date	Activity	User	Status
Sat, November 4, 2023 09:55 AM	✓ Cross-Org Restore	joe.s...h@spanr...o.com	Success

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Restoring Metadata

Spanning offers metadata restore of specific metadata types, making it easy to restore metadata directly in Spanning Backup. The following metadata types are restorable in Spanning Backup for Salesforce: ApprovalProcesses, AssignmentRules, Classes, Dashboards, Emails, FlowDefinitions, Flows, Layouts, Objects, Pages, Permissionsets, Profiles, Reports, ReportTypes, Roles, Triggers, and Workflows.

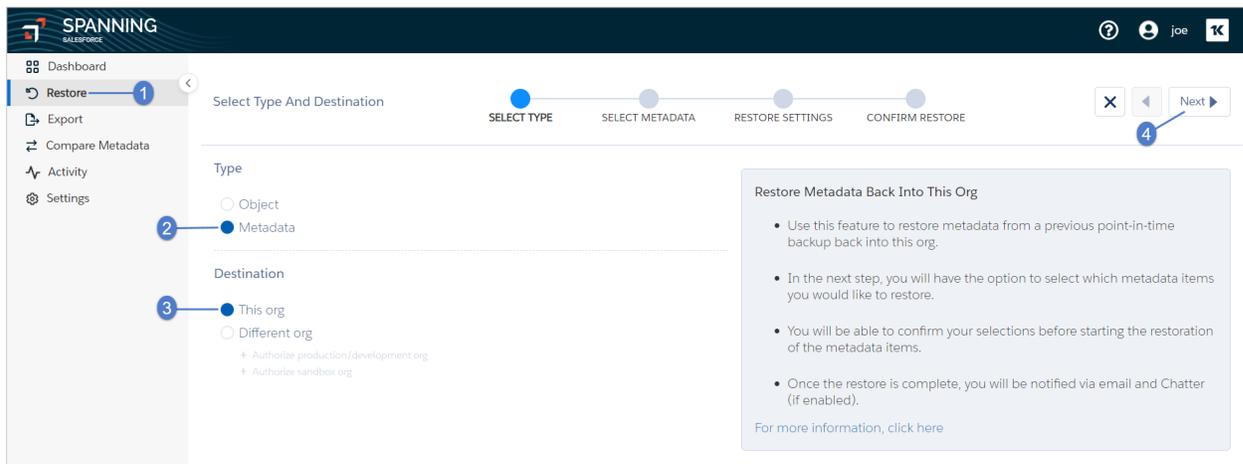
Note: To restore other metadata types, you'll need to export them out of Spanning Backup, then use a tool like Force.com IDE, ANT Migration Tool, or Workbench to import them into Salesforce. To export metadata, see "Exporting Data".

Use these procedures to restore metadata:

- "To restore metadata to the same organization"
- "To restore metadata to a different organization"

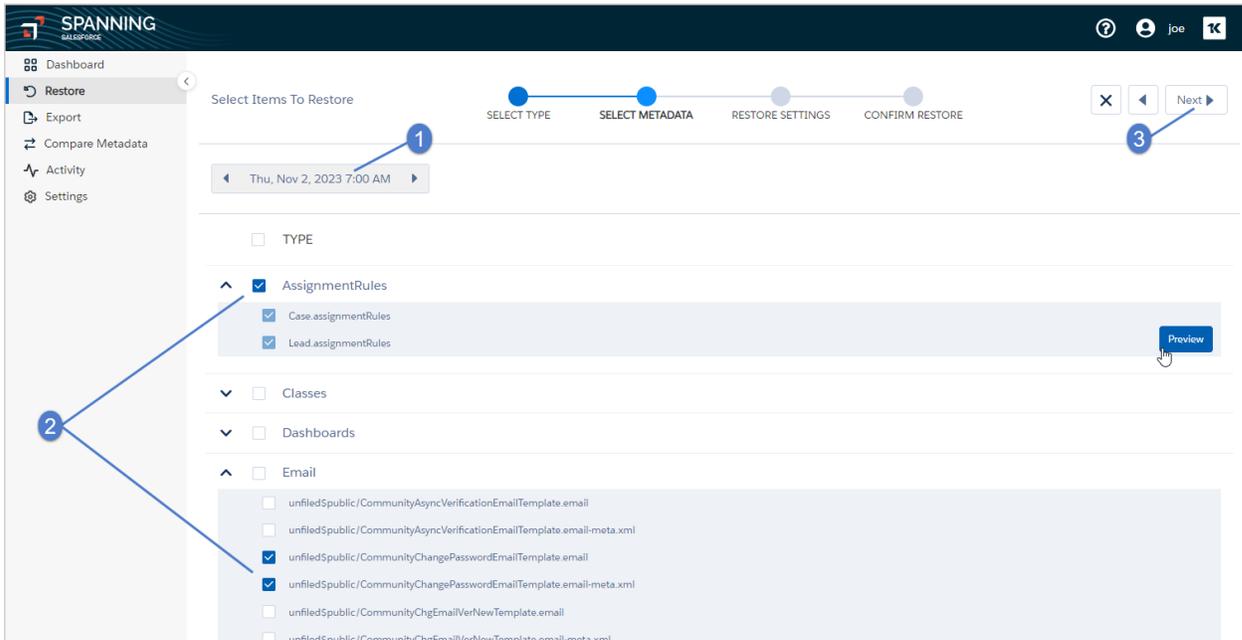
To restore metadata to the same organization

1. Log in to Spanning Backup for Salesforce as the System Administrator.
2. Click **Restore**.
3. Select **Metadata** as the type of data you want to restore.
4. Select **This Org** for the restore destination.
5. Click **Next**.

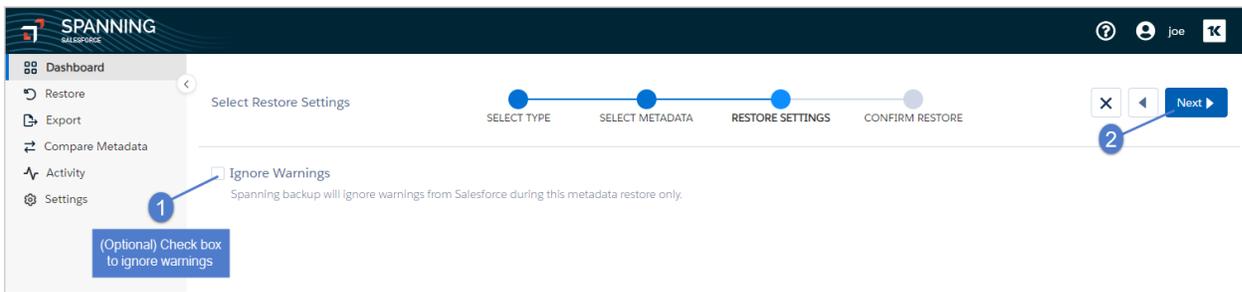


6. Select the backup to restore from.
7. Choose the items to restore by expanding the metadata types and selecting individual items. To preview an item, hover over the item and click **Preview**.

8. Once you've selected all the items you want to restore, click **Next**.

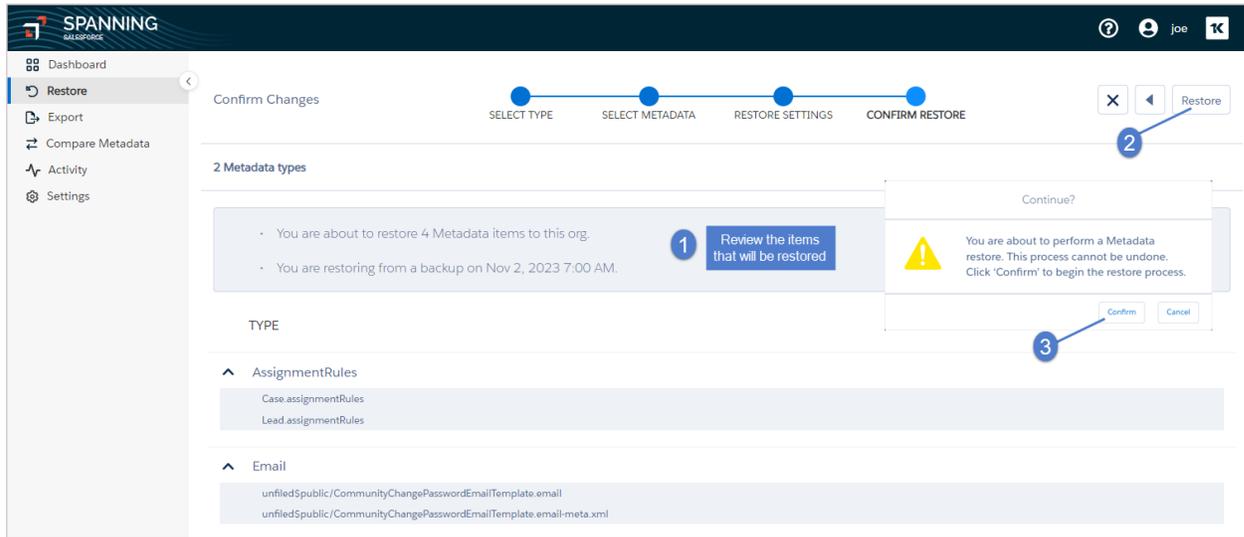


9. (Optional) Check the box to ignore warnings from Salesforce during this metadata restore only.
 10. Click **Next**.

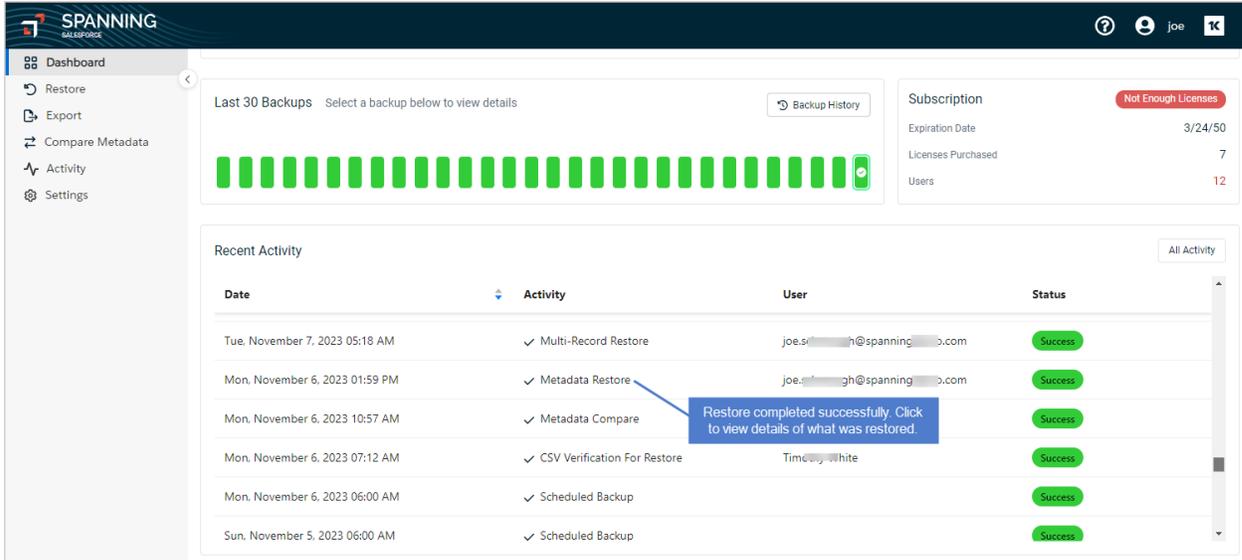


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11. Review the items that will be restored. Click **Restore**. Click **Confirm**.



12. When the restore is complete, you are notified via email and Chatter (if enabled). View the restore results on the Dashboard by clicking the **Metadata Restore** row in the Recent Activity.



SPANNING SALESFORCE

Dashboard

Restore

Export

Compare Metadata

Activity

Settings

Last 30 Backups Select a backup below to view details

Backup History

Subscription **Not Enough Licenses**

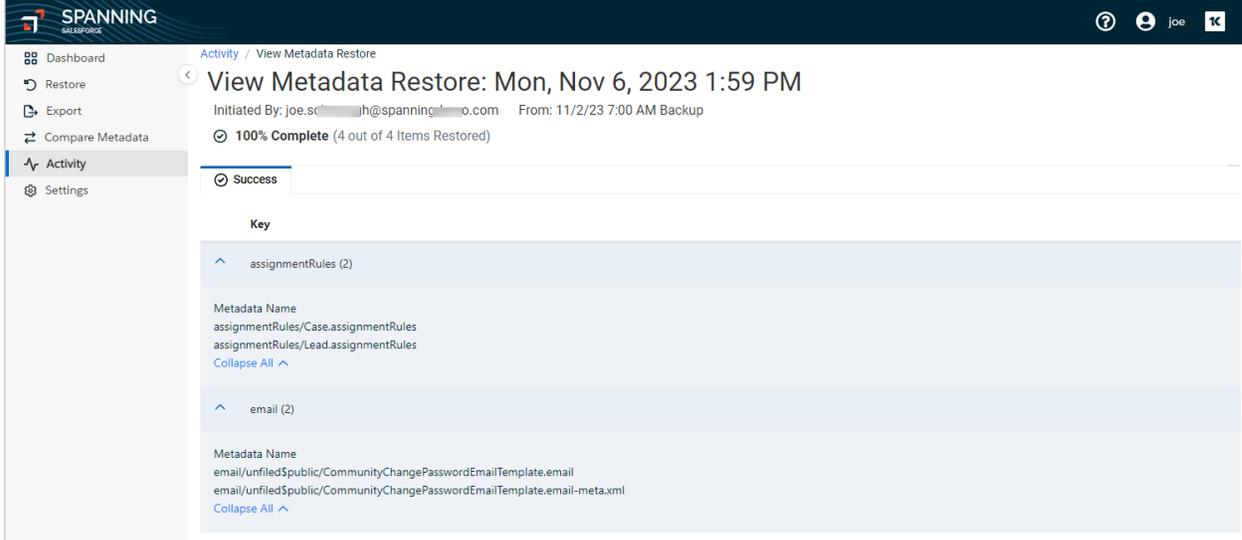
Expiration Date 3/24/50

Licenses Purchased 7

Users 12

Recent Activity All Activity

Date	Activity	User	Status
Tue, November 7, 2023 05:18 AM	✓ Multi-Record Restore	joe.s...h@spanning...o.com	Success
Mon, November 6, 2023 01:59 PM	✓ Metadata Restore	joe.s...h@spanning...o.com	Success
Mon, November 6, 2023 10:57 AM	✓ Metadata Compare		Success
Mon, November 6, 2023 07:12 AM	✓ CSV Verification For Restore	Timothy White	Success
Mon, November 6, 2023 06:00 AM	✓ Scheduled Backup		Success
Sun, November 5, 2023 06:00 AM	✓ Scheduled Backup		Success



SPANNING SALESFORCE

Dashboard

Restore

Export

Compare Metadata

Activity

Settings

Activity / View Metadata Restore

View Metadata Restore: Mon, Nov 6, 2023 1:59 PM

Initiated By: joe.s...h@spanning...o.com From: 11/2/23 7:00 AM Backup

100% Complete (4 out of 4 Items Restored)

Success

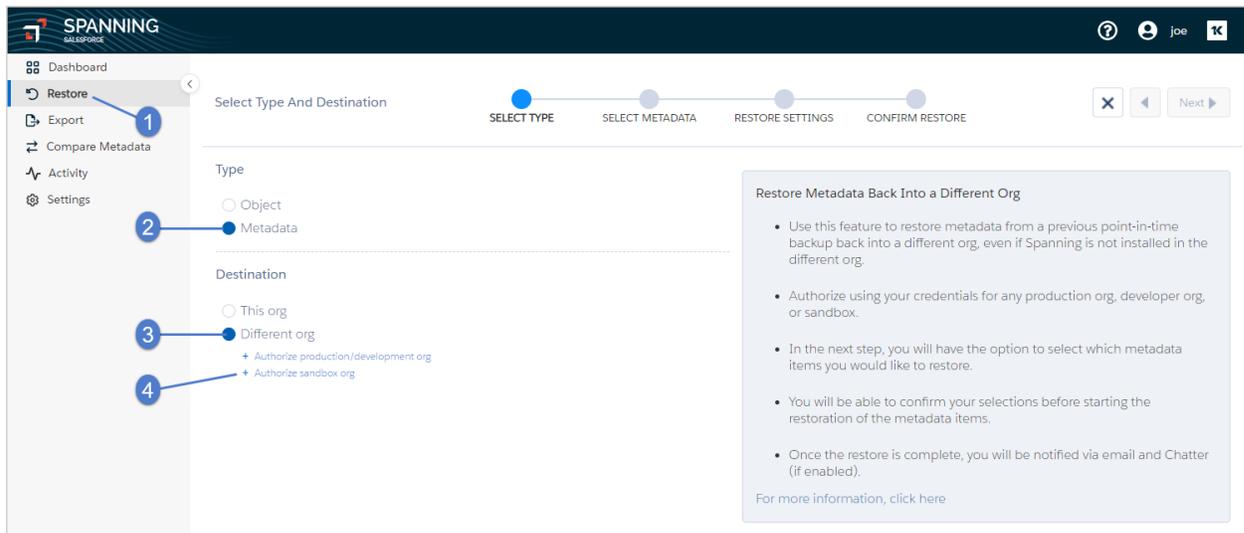
Key

- assignmentRules (2)
 - Metadata Name
 - assignmentRules/Case.assignmentRules
 - assignmentRules/Lead.assignmentRules
 - Collapse All ^
- email (2)
 - Metadata Name
 - email/unfiled\$public/CommunityChangePasswordEmailTemplate.email
 - email/unfiled\$public/CommunityChangePasswordEmailTemplate.email-meta.xml
 - Collapse All ^

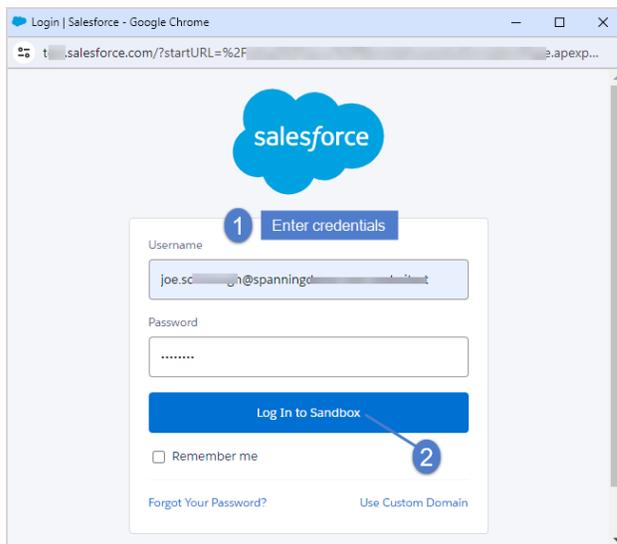
To restore metadata to a different organization

1. Log in to Spanning Backup for Salesforce as the System Administrator.
2. Click **Restore**.
3. Select **Metadata** as the type of data you want to restore.
4. Select **Different Org** for the restore destination, then click the applicable **Authorize Org** link below to select the destination org.

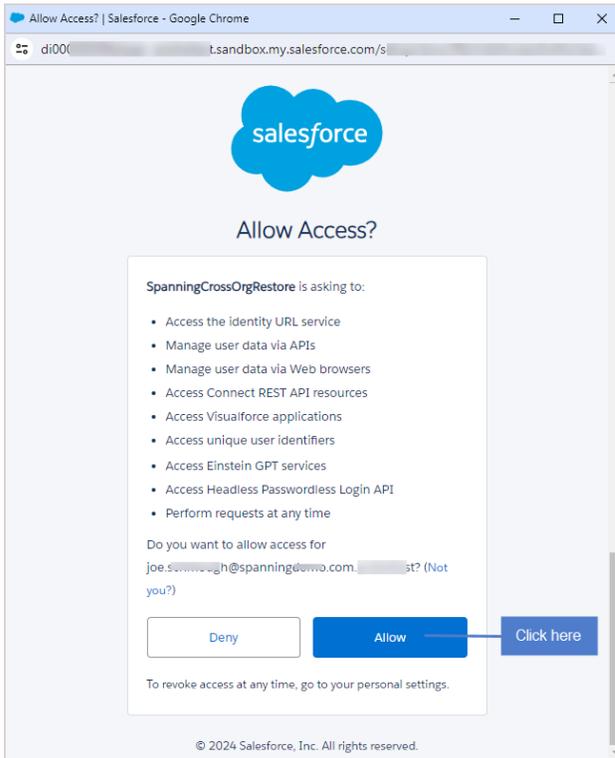
February 2024



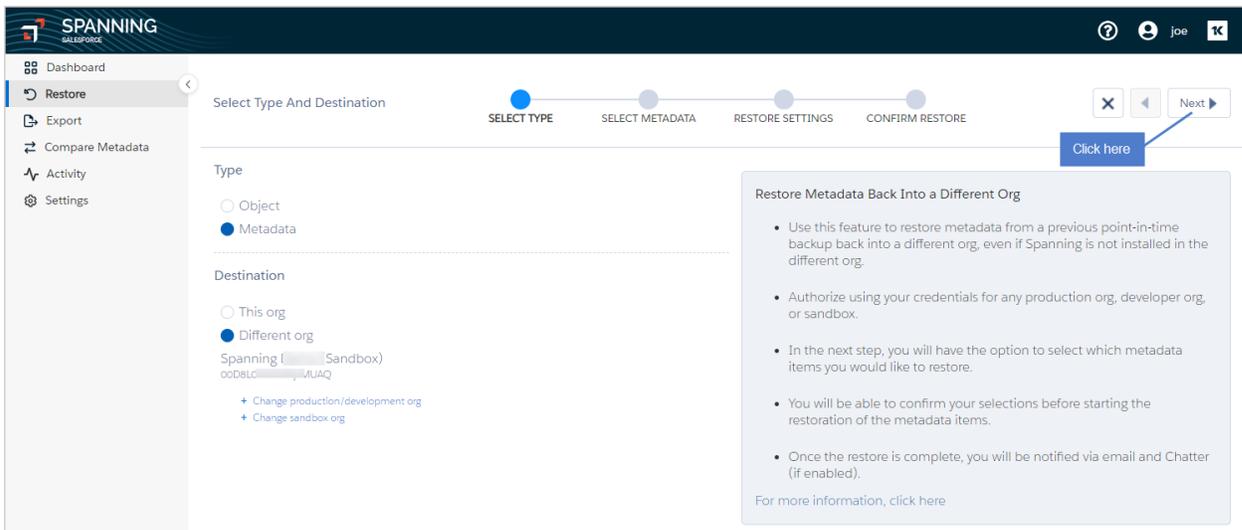
5. When prompted, enter the login credentials for your destination org. Click **Log In**.



- Click **Allow** to grant access.



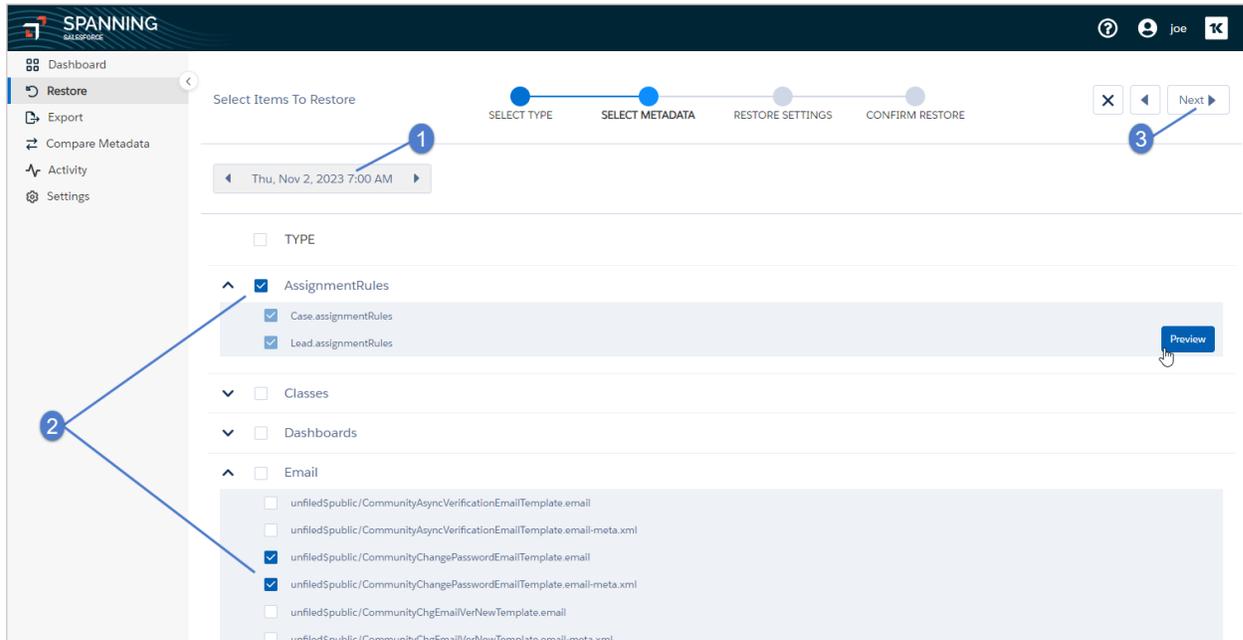
- Click **Next**.



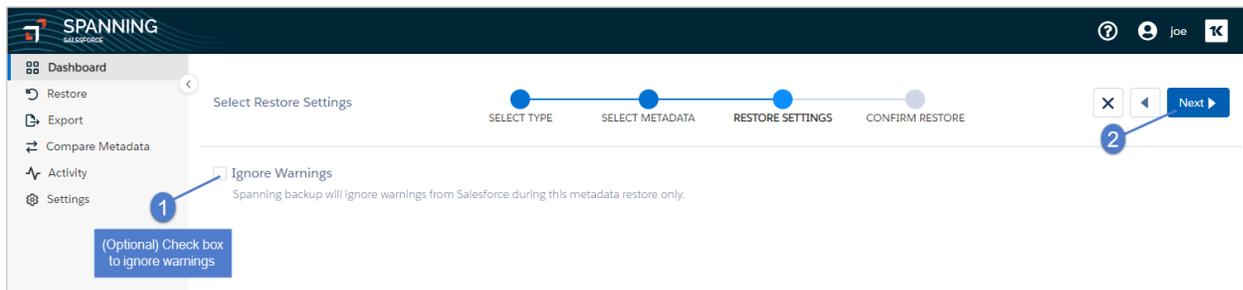
- Select the backup to restore from.
- Choose the items to restore by expanding the metadata types and selecting individual items. To preview an item, hover over the item and click **Preview**.

February 2024

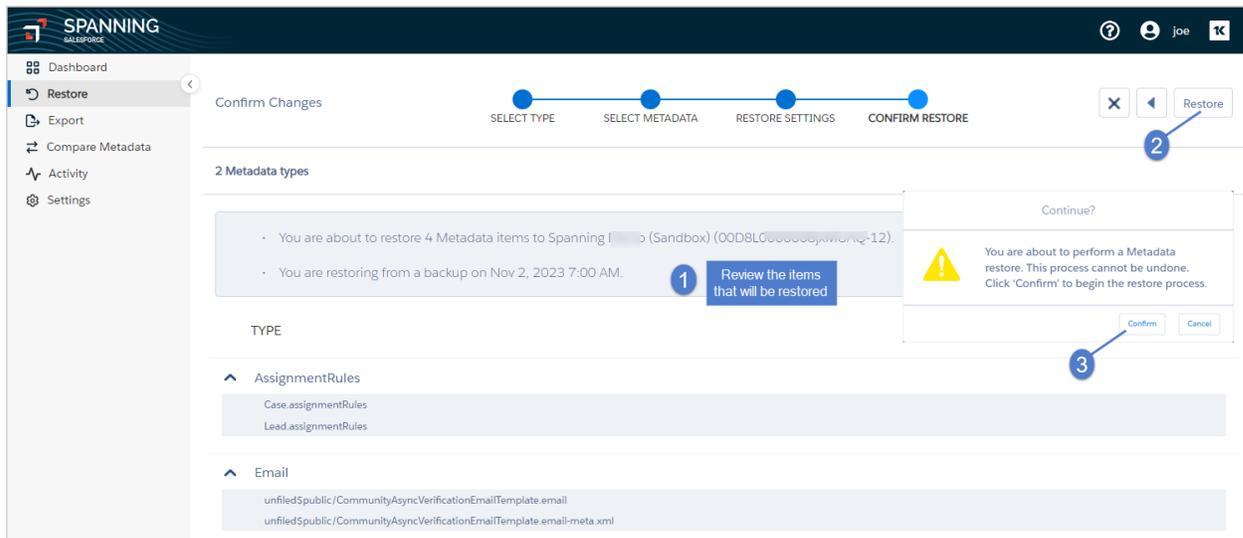
10. Once you've selected all the items you want to restore, click **Next**.



11. (Optional) Check the box to ignore warnings from Salesforce during this metadata restore only.
 12. Click **Next**.



13. Review the items that will be restored. Click **Restore**. Click **Confirm**. Data is restored to the selected organization.



- When the restore completes, you are notified via email and Chatter (if enabled). View the restore results on the Dashboard by clicking the **Metadata Restore** row in the Recent Activity.

The screenshot displays the Spanning Salesforce Admin interface. The top navigation bar includes the Spanning logo, user profile (joe), and a notification icon. The left sidebar contains menu items: Dashboard, Restore, Export, Compare Metadata, Activity, and Settings.

The main content area is divided into three sections:

- Last 30 Backups:** A row of 30 green progress indicators, with a 'Backup History' button to the right.
- Subscription:** A summary box showing 'Expiration Date' as 3/24/50, 'Licenses Purchased' as 7, and 'Users' as 12. A red banner indicates 'Not Enough Licenses'.
- Recent Activity:** A table listing recent operations. A blue callout box points to the 'Metadata Restore' entry on Nov 6, 2023, with the text: 'Restore completed successfully. Click to view details of what was restored.'

The 'Recent Activity' table data is as follows:

Date	Activity	User	Status
Tue, November 7, 2023 05:18 AM	Multi-Record Restore	joe.s...h@spanning...o.com	Success
Mon, November 6, 2023 01:59 PM	Metadata Restore	joe.s...h@spanning...o.com	Success
Mon, November 6, 2023 10:57 AM	Metadata Compare		Success
Mon, November 6, 2023 07:12 AM	CSV Verification For Restore	Timothy White	Success
Mon, November 6, 2023 06:00 AM	Scheduled Backup		Success
Sun, November 5, 2023 06:00 AM	Scheduled Backup		Success

The second screenshot shows the 'View Metadata Restore' details for the operation on Mon, Nov 6, 2023 1:59 PM. It indicates the operation was '100% Complete (4 out of 4 Items Restored)' and shows a 'Success' status. The restored metadata items are:

- assignmentRules (2):**
 - Metadata Name: assignmentRules/Case.assignmentRules
 - Metadata Name: assignmentRules/Lead.assignmentRules
- email (2):**
 - Metadata Name: email/unfiled\$public/CommunityChangePasswordEmailTemplate.email
 - Metadata Name: email/unfiled\$public/CommunityChangePasswordEmailTemplate.email-meta.xml

Comparing Metadata

Spanning enables you to quickly compare a backup's metadata to live (current) metadata or to metadata in another backup. You can compare metadata within the same organization or compare metadata in different organizations. See these topics for details:

- ["Comparing metadata within the same organization"](#)
- ["Comparing metadata in different organizations"](#)

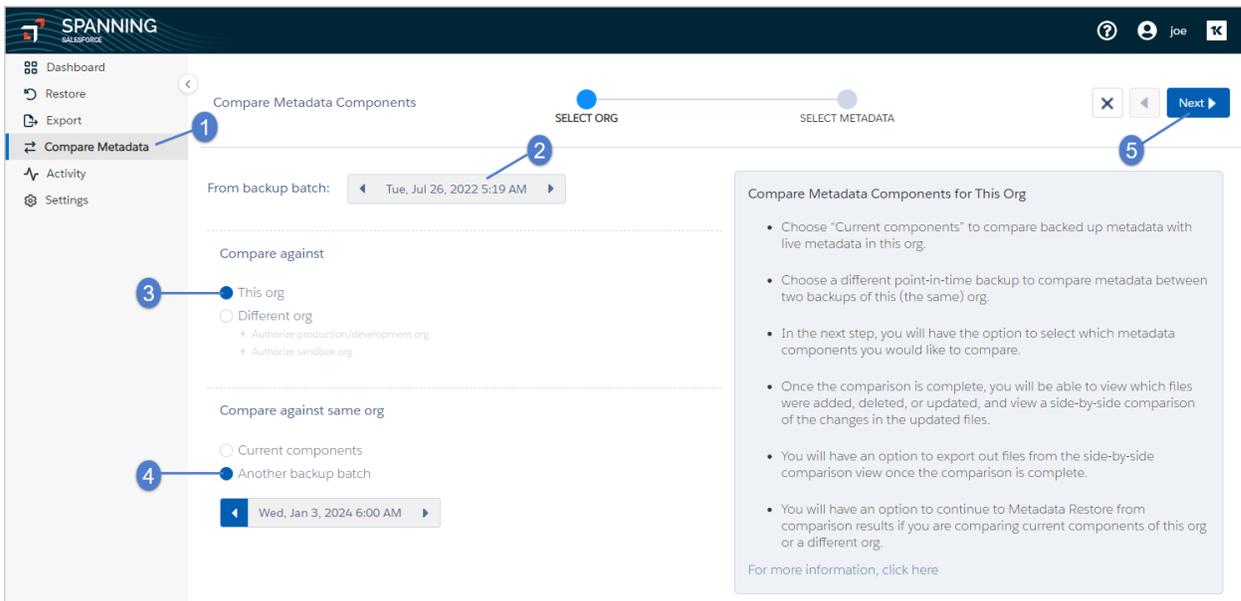
Comparing metadata within the same organization

Use this procedure to select a backup and compare its metadata to live (current) metadata or to metadata in another backup.

The comparison shows any files that were added, deleted, or updated, along with a side-by-side view of the changes in any updated files. While viewing the comparison results, you can opt to export files or perform a metadata restore.

To compare metadata within the same org

1. Log in to Spanning Backup for Salesforce as the System Administrator.
2. Click **Compare Metadata**.
3. Select the backup whose metadata you will compare.
4. Under **Compare against**, select **This Org**.
5. Under **Compare against same org**, select one of these options:
 - Current components – Use to compare metadata in the backup you selected to live Salesforce metadata.
 - Another backup batch – Use to compare metadata in the backup you selected to metadata in a later backup (to see differences between two points in time). After selecting this option, select a backup date below.
6. Click **Next**.



7. Check boxes to select the components to compare. To quickly locate specific components, you can:
 - Enter text in the Search field to filter the list by component name.
 - Check the **Show only restorable metadata** box to exclude unrestoreable components.
 - Sort the list alphanumerically or by count.
8. Click **Compare**. Spanning runs the metadata comparison. When the comparison is complete, you are notified via email and Chatter (if enabled).

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SPANNING SALESFORCE

Dashboard
Restore
Export
Compare Metadata
Activity
Settings

Select Metadata Components To Compare

(Optional) Enter search text or check **Show only restorable metadata** to filter the component list.

SEARCH

Show only restorable metadata

Classes (516)
ObjectTranslations (165)
Pages (154)
Staticresources (152)
Objects (127)
Settings (106)
Reports (95)
SharingRules (69)

(Optional) Select sort criteria to reorder the list.

Count - Descending
Alpha - A to Z
Alpha - Z to A
Count - Ascending
Count - Descending

Compare

SPANNING SALESFORCE

Dashboard
Restore
Export
Compare Metadata
Activity
Settings

Comparing Metadata

You can choose to wait here while the comparison is running, or navigate back to the Spanning Dashboard. You will be notified via email and Chatter when the comparison completes.

Go To Dashboard

Compare

Count - Descending

You can wait on the Compare Metadata Components page while the files are being compared or access the results from the Dashboard or by clicking the link provided in the email or Chatter notification. To access the results from the Dashboard, click the **Metadata Compare** row in the Recent Activity:

SPANNING SALESFORCE

Dashboard
Restore
Export
Compare Metadata
Activity
Settings

Last 30 Backups Select a backup below to view details Backup History

Subscription Not Enough Licenses
Expiration Date 3/24/50
Licenses Purchased 7
Users 12

Recent Activity All Activity

Date	Activity	User	Status
Wed. January 3, 2024 09:03 AM	✓ Metadata Compare	joe.sullivan@spanning.com	Success
Wed. January 3, 2024 06:00 AM	✓ Scheduled Backup		Success
Wed. January 3, 2024 03:02 AM	⊙ Multi-Record Restore	rohi.ale@graphus.ai	Partial 67%
Wed. January 3, 2024 02:04 AM	✓ Metadata Compare	rohi.ale@graphus.ai	Success

Click here

- Results display on the Activity > View Metadata Compare page.
 - All of the metadata components from both versions display in alphabetical order:

Components from Tue, Jul 26, 2022 5:19 AM backup	Components from Wed, Jan 3, 2024 9:03 AM backup	Match	Changed	Only in One
classes - 516	516		2 Changed	
objects - 127	132		19 Changed, 4 Deleted, 9 Added	
reports - 95	100		5 Added	

- Click to view and compare a component's metadata items. Gray items are the same in both backups, green items are different, and red items only exist in one of the backups. Check **Only show fields with a difference** to remove unchanged items from the display.

Click to view a component's items

Check box to hide unchanged items

Metadata items

Click to load more items

Added items

Deleted items

- Click an item to drill down to a more detailed view of the comparison. If you want to see the specific file of metadata in its entirety, click **Export** to export that metadata to your local computer.

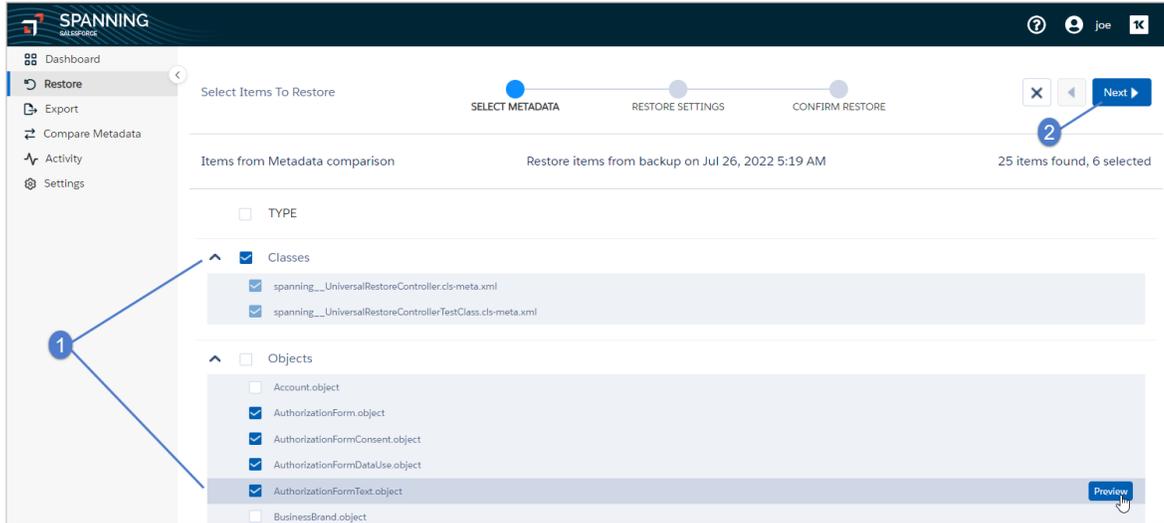
The screenshot shows the SPANNING Salesforce interface. The main window is titled "View Metadata Components: Wed, Jan 3, 2024 9:03 AM". It displays a comparison of metadata components between two backups: "Tue, Jul 26, 2022 5:19 AM backup" and "Wed, Jan 3, 2024 9:03 AM backup". A table lists components like classes, objects, and reports with their counts and changes. A pop-up window shows the XML for "AuthorizationFormConsent.object", with annotations 1-4 pointing to specific elements and actions like "Export" and "Close".

Components from Tue, Jul 26, 2022 5:19 AM backup	Components from Wed, Jan 3, 2024 9:03 AM backup	Match	Changed	Only in One
classes - 516	516		2 Changed	
objects - 127	132		19 Changed, 4 Deleted, 9 Added	
reports - 95	100		5 Added	

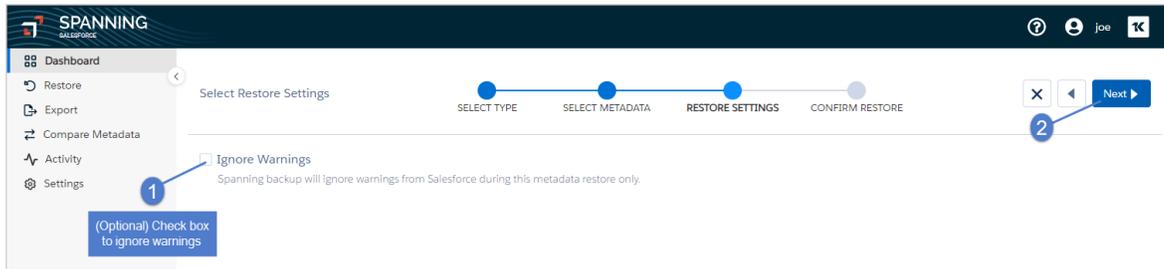
- 10. (Optional) To restore data from the comparison results:
 - Click **Continue to Restore**.

This screenshot shows the same SPANNING Salesforce interface as above, but with the "Continue to Restore" button highlighted in blue. The "Click here" text is also present next to the button.

- Select the items that you would like to restore. Click **Next**.

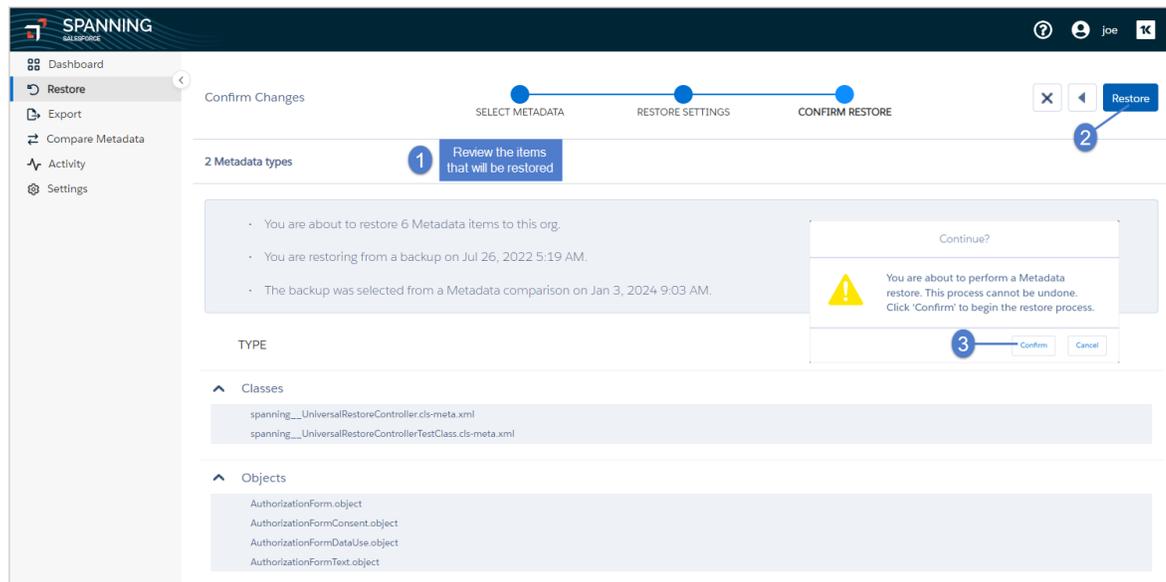


- (Optional) Check the box to ignore warnings from Salesforce during this metadata restore only.
- Click **Next**.



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- Review the items to restore. Click **Restore**. Click **Confirm**. Selected items are restored.



Note: You can only restore specific metadata types directly from Spanning. For non-restorable metadata types, you can export the items from Spanning and use tools like Force.com IDE or the ANT migration tool to restore them back into Salesforce.

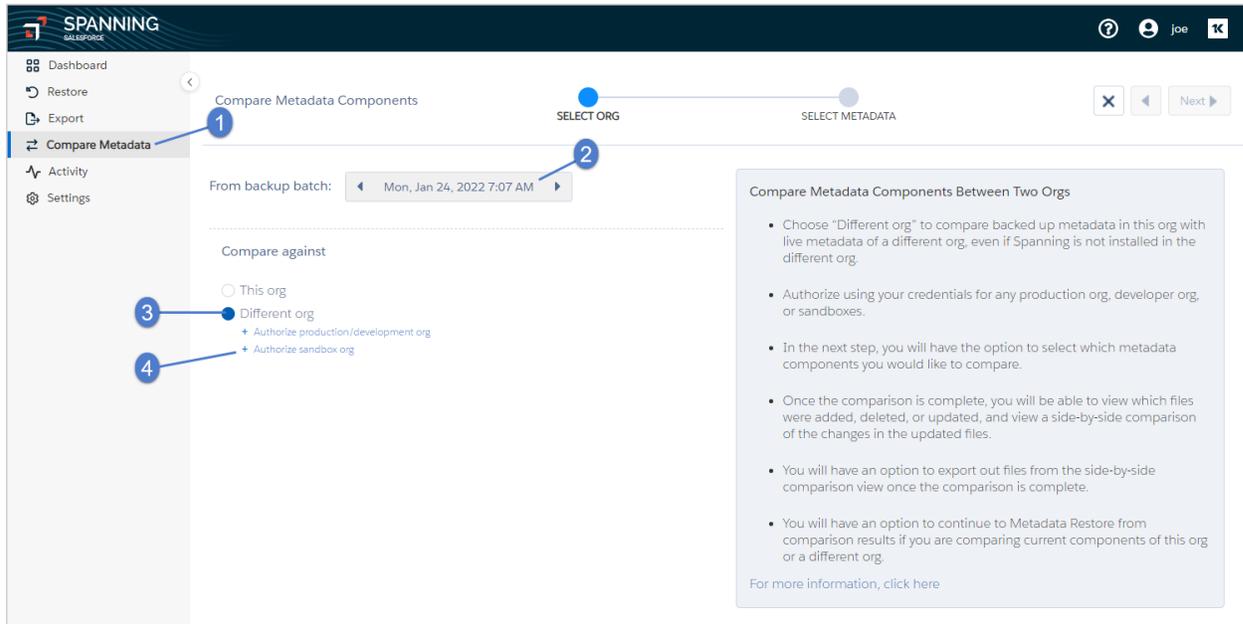
Comparing metadata in different organizations

Use this procedure to select a backup and compare its metadata to the live (current) metadata in a different Salesforce org.

The comparison shows any files that were added, deleted, or updated, along with a side-by-side view of the changes in any updated files. While viewing the comparison results, you can opt to export files or perform a metadata restore.

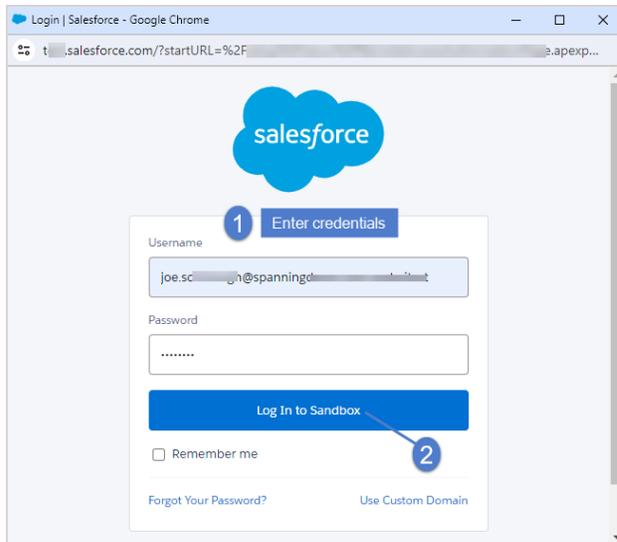
To compare metadata in different orgs

- Log in to Spanning Backup for Salesforce as the System Administrator.
- Click **Compare Metadata**.
- Select the backup whose metadata you will compare.
- Under **Compare against**, select **Diff Org**, then click the applicable **Authorize Org** link below to select the target org.



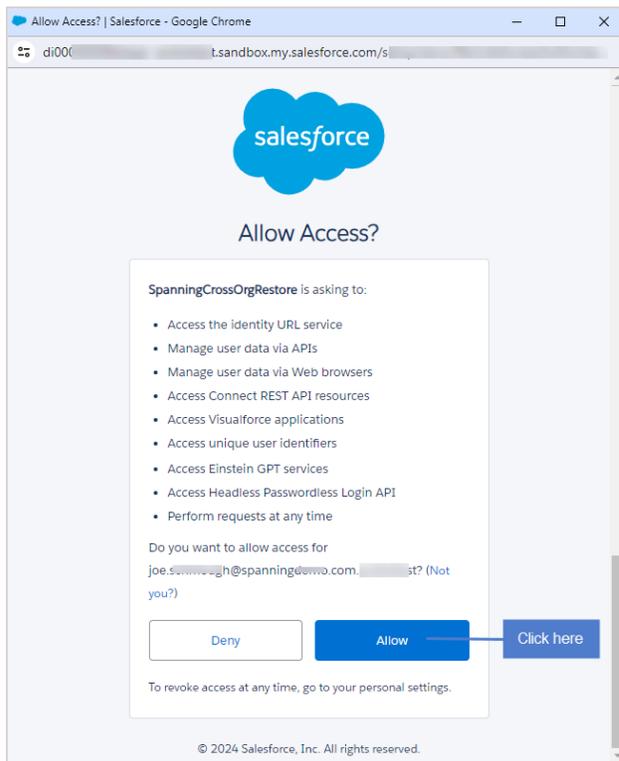
Note: Spanning Backup for Salesforce does not need to be installed in the target org to perform the metadata comparison.

5. When prompted, enter the login credentials for the org you selected. Click **Log In**.

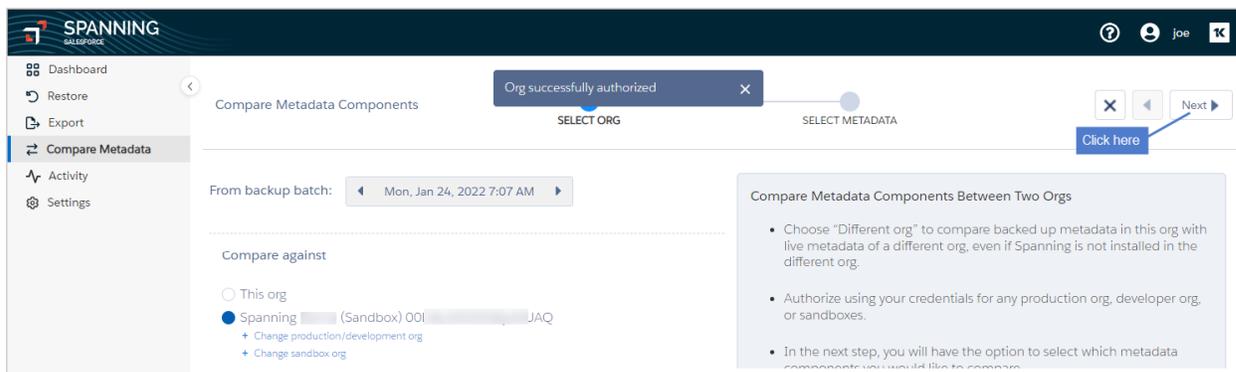


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6. Click **Allow** to grant access.



7. Click **Next**.

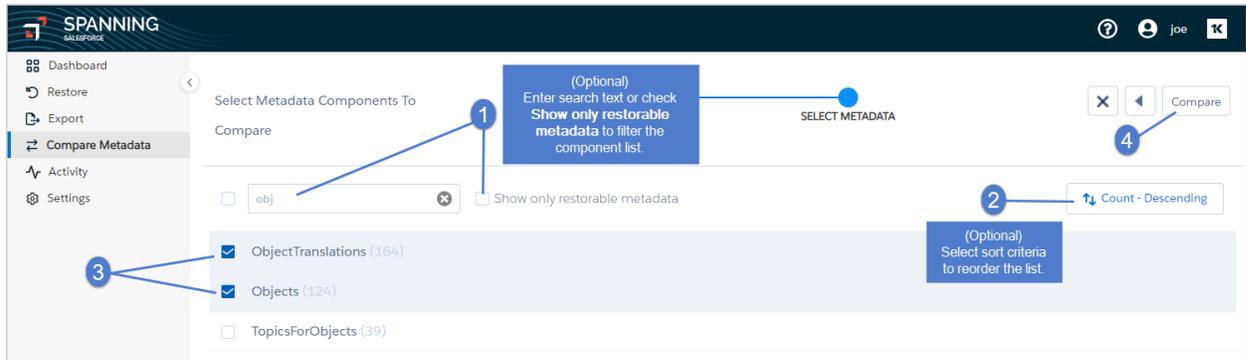


8. Check boxes to select the components to compare. To quickly locate specific components, you can:

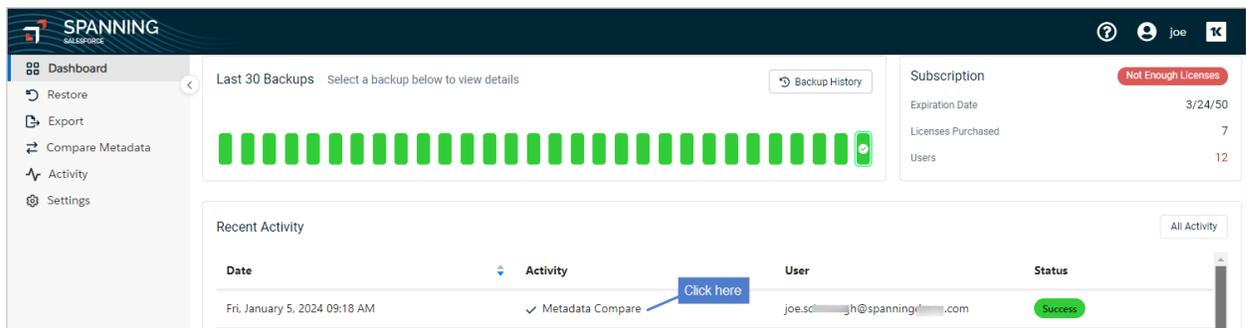
- Enter text in the Search field to filter the list by component name.
- Check the **Show only restorable metadata** box to exclude unrestorable components.
- Sort the list alphanumerically or by count.

9. Click **Compare**. Spanning runs the metadata comparison.

When the comparison is complete, you are notified via email and Chatter (if enabled).

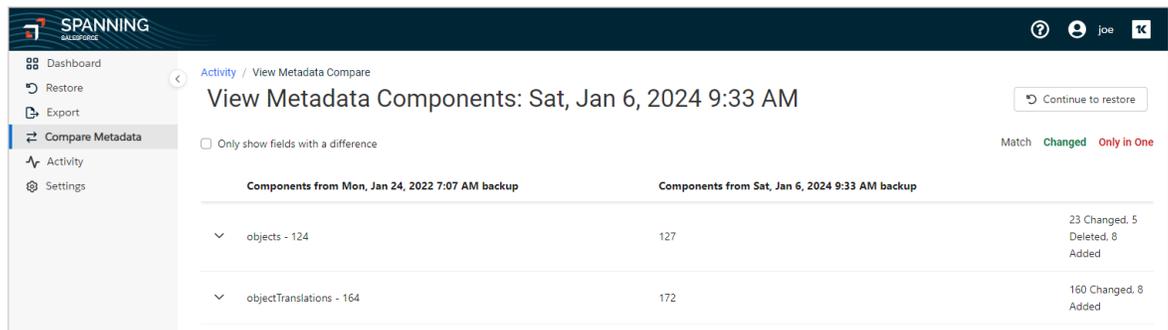


You can wait on the Compare Metadata Components page while the files are being compared or access the results from the Dashboard or by clicking the link provided in the email or Chatter notification. To access the results from the Dashboard, click the **Metadata Compare** row in the Recent Activity:



10. Results display on the Activity > View Metadata Compare page.

- All of the metadata components from both versions display in alphabetical order:



- Click  to view and compare a component's metadata items. Gray items are the same in both backups, green items are different, and red items only exist in one of the backups. Check **Only show fields with a difference** to remove unchanged items from the display.

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Dashboard / Activity / View Metadata Compare

View Metadata Components: Sat, Jan 6, 2024 9:33 AM

Continue to restore

Match **Changed** Only in One

Components from Mon, Jan 24, 2022 7:07 AM backup	Components from Sat, Jan 6, 2024 9:33 AM backup	
objects - 124	127	23 Changed, 5 Deleted, 8 Added
objectTranslations - 164	172	Summary of changes 160 Changed, 8 Added

Only show fields with a difference

objectTranslations/Account-de.objectTranslation
objectTranslations/Account-en_US.objectTranslation
objectTranslations/Account-es.objectTranslation
objectTranslations/Account-fr.objectTranslation
objectTranslations/Account-it.objectTranslation
objectTranslations/Account-ja.objectTranslation
objectTranslations/Account-ko.objectTranslation
objectTranslations/Contract-zh_TW.objectTranslation

objectTranslations/Custom_Object_1_c-en_US.objectTranslation
objectTranslations/Custom_Object_2_c-en_US.objectTranslation
objectTranslations/Device_c-en_US.objectTranslation
objectTranslations/Lead-de.objectTranslation
objectTranslations/Lead-en_US.objectTranslation
objectTranslations/Lead-es.objectTranslation
objectTranslations/Lead-fr.objectTranslation
objectTranslations/Lead-it.objectTranslation
objectTranslations/Lead-ja.objectTranslation
objectTranslations/Lead-ko.objectTranslation

objectTranslations/Account-de.objectTranslation
objectTranslations/Account-en_US.objectTranslation
objectTranslations/Account-es.objectTranslation
objectTranslations/Account-fr.objectTranslation
objectTranslations/Account-it.objectTranslation
objectTranslations/Account-ja.objectTranslation
objectTranslations/Account-ko.objectTranslation
objectTranslations/Contract-zh_TW.objectTranslation
Added item objectTranslations/Custom_Account_c-en_US.objectTranslation
objectTranslations/Custom_Object_1_c-en_US.objectTranslation
objectTranslations/Custom_Object_2_c-en_US.objectTranslation
objectTranslations/Device_c-en_US.objectTranslation
objectTranslations/Lead-de.objectTranslation
objectTranslations/Lead-en_US.objectTranslation
objectTranslations/Lead-es.objectTranslation
objectTranslations/Lead-fr.objectTranslation
objectTranslations/Lead-it.objectTranslation
objectTranslations/Lead-ja.objectTranslation
objectTranslations/Lead-ko.objectTranslation

Click to view a component's items

Check box to hide unchanged items

Metadata items

Click to load more items

Load More

- Click an item to drill down to a more detailed view of the comparison. If you want to see the specific file of metadata in its entirety, click **Export** to export that metadata to your local computer.

View Metadata Components: Sat, Jan 6, 2024 9:33 AM

Match **Changed** Only in One

objects/Contact.object

Components from Mon, Jan 24, 2022 7:07 AM backup | Components from Sat, Jan 6, 2024 9:33 AM backup

23 Changed, 5 Deleted, 8 Added

1. Click on 'ts/Contact.object' in the list

2. Click 'Details display' for the selected object

3. Click 'Export' buttons

4. Click 'Close'

(Optional) Click to download either metadata file

- 11. (Optional) To restore data from the comparison results:
 - Click **Continue to Restore**.

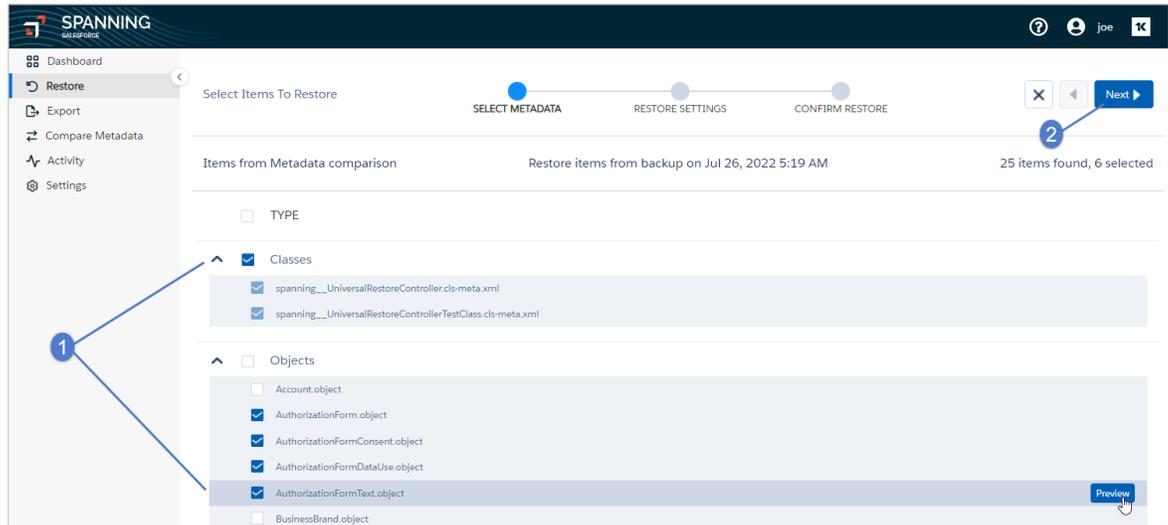
View Metadata Components: Sat, Jan 6, 2024 9:33 AM

Click here | Continue to restore

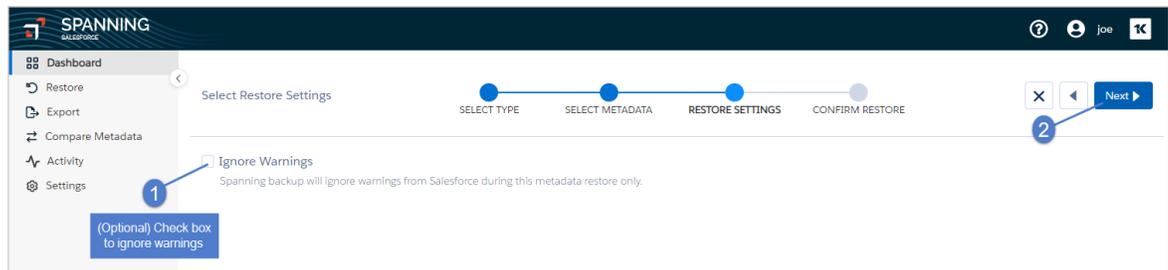
Components from Mon, Jan 24, 2022 7:07 AM backup	Components from Sat, Jan 6, 2024 9:33 AM backup	
objects - 124	127	23 Changed, 5 Deleted, 8 Added
objectTranslations - 164	172	160 Changed, 8 Added

February 2024

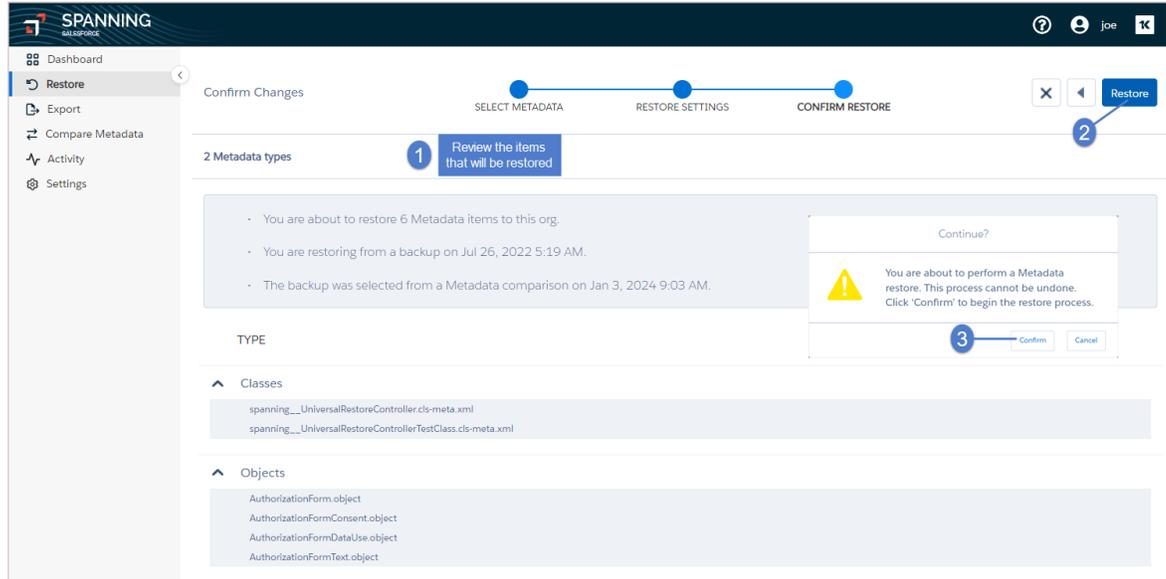
- Select the items that you would like to restore. Click **Next**.



- (Optional) Check the box to ignore warnings from Salesforce during this metadata restore only.
- Click **Next**.



- Review the items to restore. Click **Restore**. Click **Confirm**. Selected items are restored.



Note: You can only restore specific metadata types directly from Spanning. For non-restorable metadata types, you can export the items from Spanning and use tools like Force.com IDE or the ANT migration tool to restore them back into Salesforce.

Exporting Data

To export your backed up data out of Spanning Backup to a CSV file:

1. Log in to Spanning Backup for Salesforce.

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- Click on an object type on the main dashboard.

Monday January 8, 2024 6:00 AM

Backup was Successful! Backup Now Restore

There were **0 errors and 0 warnings**
[View Backup Details](#) →

100%

Your next automated backup is scheduled for 6:00 AM tomorrow

Click an object type

Object Type	Updated	New	Deleted	Undeleted
Accounts	0	0	0	0
Leads	0	0	0	0
Cases	0	0	0	0
Contacts	0	0	0	0

- A snapshot of records backed up in the last 8 days displays. Click **Close**.

Activity / View Backup

View Backup: Mon, January 8, 2024 06:00 AM Export

Backup Count History

Account From Automated Wed, Jan 3, 2024 6:00 AM 1 Record Updated through Jan 8, 2024

Record Count

Backup Start Time

Backup Start Time	Updated	New	Deleted	Undeleted
Jan 1 6:00 am	0	0	0	0
Jan 2 6:00 am	0	0	0	0
Jan 3 6:00 am	1	0	0	0
Jan 4 6:00 am	0	0	0	0
Jan 5 6:00 am	0	0	0	0
Jan 6 6:00 am	0	0	0	0
Jan 7 6:00 am	0	0	0	0
Jan 8 6:00 am	0	0	0	0

Click Close Close

UserFeed (13,442)* 0 2 0 0

- On the Activity > View Backup page, select the backup date.
- On the Records tab, select objects to export. (To filter the object list, enter text in the **Search backup** field or check the **Show Modified Results Only** box.)

The screenshot shows the 'View Backup' interface for a backup taken on Monday, January 8, 2024, at 06:00 AM. The status is '100% Complete'. The 'Records' tab is selected, and the search field contains the text 'user'. The 'Show Modified Results Only' checkbox is checked. The table below shows the following data:

Type	Updated	New	Deleted	Undeleted
UserFeed (13,442)*	0	2	0	0

- On the Metadata tab, select metadata components to export. (To filter the component list, enter text in the **Search backup** field or check the **Show Modified Results Only** box.)
- Click **Export**. The selected objects and metadata components are exported.

The screenshot shows the 'View Backup' interface for a backup taken on Monday, January 8, 2024, at 06:00 AM. The status is '100% Complete'. The 'Metadata' tab is selected, and the search field contains the text 'Search backup'. The 'Show Modified Results Only' checkbox is checked. The table below shows the following data:

Type	Updated	New	Deleted
CleanDataServices (3)	1	0	0

When the export is complete, you are notified via email or Chatter (if enabled). Access the export from the Dashboard or by clicking the link provided in the email or Chatter notification. To access the export from the Dashboard, click the **Export** row in the Recent Activity:

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The screenshot shows the SPANNING Salesforce Admin dashboard. On the left is a navigation menu with options: Dashboard, Restore, Export, Compare Metadata, Activity, and Settings. The main area is titled 'Last 30 Backups' and contains a progress bar with 30 green bars, the last one having a checkmark. Below this is a 'Recent Activity' table with columns: Date, Activity, User, and Status. The first row shows an 'Export' activity on 'Mon, January 8, 2024 09:02 AM' by user 'joe.s...@spanning...com' with a 'Success' status. A blue callout box labeled 'Click here' points to the 'Export' button in the 'Activity' column.

8. Click **Request Download** to download the export file to your local machine:

The first screenshot shows the 'View Export: Mon, Jan 8, 2024 9:02 AM' page. It displays details: 'Initiated By: joe.s...@spanningc...com', 'From: Backup', 'Expires: 1/15/24 9:09 AM', and '100% Complete'. A table lists the export contents:

Object Type	Size	Count
UserFeed	6.85 MB	13441
Metadata	20.71 KB	3

A blue callout box labeled 'Click here' points to the 'Request Download 414.43 KB' button.

The second screenshot shows a Windows file explorer window in the 'Downloads' folder. It displays a file named 'spanning-export-000...' with a size of 32083 bytes, dated 1/8/2024 9:51 AM, and of type 'WinZip File'. A blue callout box labeled 'Export is downloaded' points to the file.

Viewing Application Activity

Spanning offers an immutable log of administrator and end-user activity. The log contains activity and settings history from the time Spanning Backup was installed. To view the log, click **Activity**.

Information displays on the Activity page in these tabs:

- **Past** – Displays completed application activities, such as restores and backups. You can sort and filter the display, click a row to drill down for more detail, or click **Export** to download a CSV file of the log. For details, see "[Viewing past activity](#)".

- **Current** – Shows currently running activities. Includes the start date and time, event type, user who performed the activity (if applicable), and a progress bar.
- **Settings Activity** – Displays settings activities, such as configuration changes and logins by external users. You can sort and filter the display, or click **Export** to download a CSV file of the log. For details, see "[Viewing settings activity](#)".

Viewing past activity

Activities are listed on the Past tab by date, with the most recent at the top of the list. Click a column heading to change the sort order of the display. Click  to filter the list (for details, see "[Filtering the activity log](#)").

The following information is given for each activity in the list:

- **Date** – Date and time of the activity.
- **Event** – Event type: Scheduled Backup, Manual Backup, Object Restore, Metadata Restore, Multi-Record Restore, Cross-Org Restore, Metadata Compare, Export, Download Batch Output, CSV Verification, GDPR Verification, GDPR Overwriting, or GDPR Deletion.
- **Duration** – Elapsed time of the activity.
- **User** – Name of the user who performed the activity. (Blank for scheduled backups.)

Click on any entry to see additional details and run related operations.

Click **Export** to download all activity history to a CSV file on your local machine.

February 2024

Activity

Click to download CSV Export

1 A list of past activity displays

2

Search Log 30 of 10051 Results Filter Refresh

Date	Event	Duration	User	Result
2/16/24 5:00:17 AM	Scheduled Backup	4 Minutes		Success
2/15/24 8:22:27 AM	Multi-Record Restore		joe.s...@spanning...o.com (joe.s...@spanning...o.com)	Success
2/15/24 6:26:56 AM	Metadata Compare	<1 Minute	bia...atto.com (bia...to.com)	Success
2/15/24 6:23:47 AM	Multi-Record Restore	<1 Minute	bia...to.com (bia...to.com)	Success
2/14/24 11:38:11 AM	Metadata Compare	<1 Minute	Tom...han (tp...nds.com)	Success
2/14/24 5:00:15 AM	Scheduled Backup	3 Minutes		Success
2/13/24 1:05:03 PM	Multi-Record Restore	<1 Minute	aso...nds.com (as...nds.com)	Success
2/13/24 5:55:46 AM	Metadata Compare	3 Minutes	roh...us.ai (ro...us.ai)	Success
2/13/24 5:00:18 AM	Scheduled Backup	3 Minutes		Success
2/12/24 10:50:37 AM	Metadata Compare	1 Minute	ke...ya.com (ke...ya.com)	Success
2/12/24 5:00:15 AM	Scheduled Backup	3 Minutes		Success

Click to view details

Activity / View Export

View Export: Tue, Jan 16, 2024 7:22 AM

Request Download 2.8 KB

Initiated By: joe.s...h@spanning...o.com From: Backup Expires: 1/23/24 7:24 AM

100% Complete

Activity detail displays

Success

Object Type	Size	Count
ContentDocument	28.08 KB	43

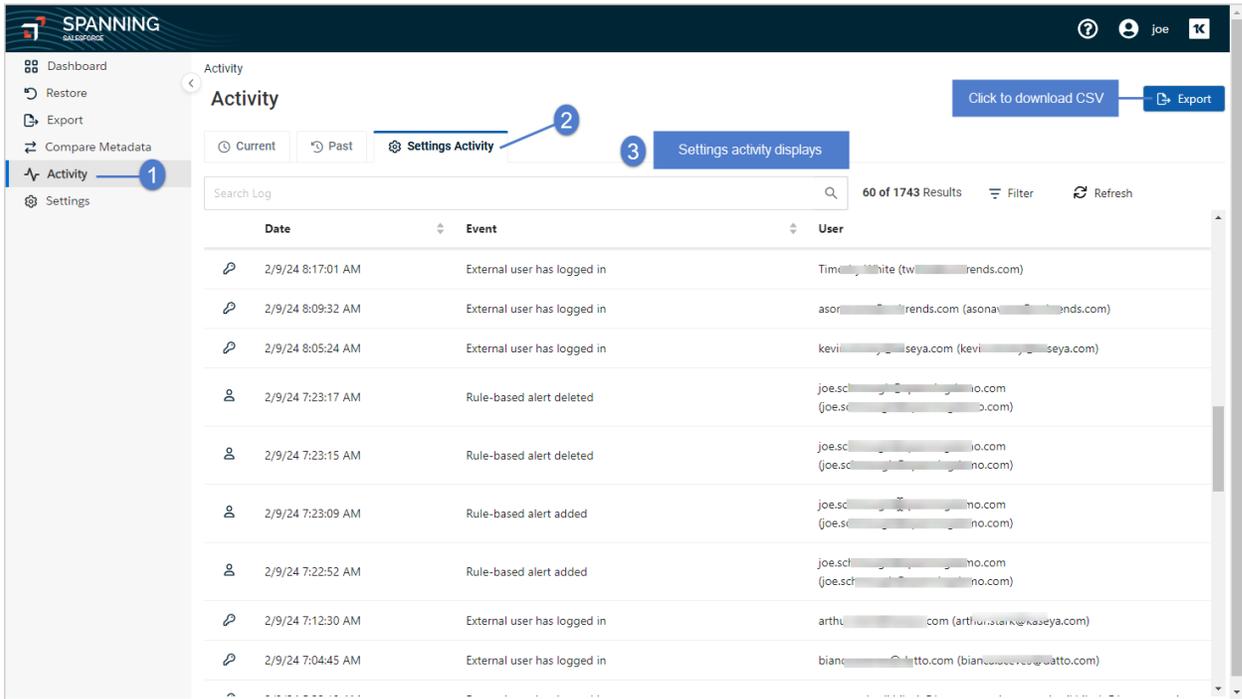
Viewing settings activity

Activities are listed on the Settings Activity tab by date, with the most recent at the top of the list. Click a column heading to change the sort order of the display. Click to filter the list (for details, see "Filtering the activity log"). Click **Export** to download all activity history to a CSV file on your local machine.

The following information is given for each activity in the list:

- Date – Date and time of the activity.
- Event – Event type (e.g., Changed Only Allow Admins setting, Rule-based alert added, Changed API limit, or Billing information updated).

- User – Name of the user who performed the activity.



The screenshot shows the Spanning Backup for Salesforce Admin interface. The left sidebar contains navigation options: Dashboard, Restore, Export, Compare Metadata, Activity (selected), and Settings. The main area is titled 'Activity' and has tabs for 'Current', 'Past', and 'Settings Activity' (selected). A search bar is present with the text '60 of 1743 Results'. Below the search bar is a table with columns 'Date', 'Event', and 'User'. The table contains several rows of activity logs, including 'External user has logged in' and 'Rule-based alert deleted/added'. A blue callout box points to the 'Settings Activity' tab with the text 'Settings activity displays'. Another blue callout box points to the 'Filter' icon with the text 'Click to download CSV' and 'Export' buttons.

Date	Event	User
2/9/24 8:17:01 AM	External user has logged in	Timothy White (tw...@kaseya.com)
2/9/24 8:09:32 AM	External user has logged in	asona...@kaseya.com
2/9/24 8:05:24 AM	External user has logged in	kevin...@kaseya.com
2/9/24 7:23:17 AM	Rule-based alert deleted	joe.sc...@kaseya.com
2/9/24 7:23:15 AM	Rule-based alert deleted	joe.sc...@kaseya.com
2/9/24 7:23:09 AM	Rule-based alert added	joe.sc...@kaseya.com
2/9/24 7:22:52 AM	Rule-based alert added	joe.sc...@kaseya.com
2/9/24 7:12:30 AM	External user has logged in	arthur...@kaseya.com
2/9/24 7:04:45 AM	External user has logged in	bianca...@kaseya.com

Filtering the activity log

To quickly find the activities you are interested in, use these steps to filter the list:

1. On the Past or Settings Activity tab, click .



The screenshot shows the Spanning Backup for Salesforce Admin interface. The left sidebar is the same as in the previous screenshot. The main area is titled 'Activity' and has tabs for 'Current', 'Past', and 'Settings Activity' (selected). The search bar shows '30 of 10051 Results'. A blue callout box points to the 'Filter' icon with the text 'Click here'.

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2. Enter one or more filter criteria. Click **Apply**.

The screenshot displays the Spanning Salesforce Admin interface. The main window shows the 'Activity' page with a table of activity records. A 'Filter' overlay is open on the right side, allowing users to refine the activity list. The filter includes the following fields:

- Actor:** A text input field containing 'joe'.
- Date:** A date range selector showing '11/1/2023' to '1/16/2024'.
- Event Type:** A dropdown menu with 'Metadata Compare' selected. A hand cursor is pointing to this option.

The 'Apply' button at the bottom right of the filter overlay is highlighted with a circled '2', indicating the next step in the process. The background activity table shows various events such as 'Scheduled Backup', 'Export', 'Manual Backup', and 'Metadata Compare'.

Date	Event	Duration	Actor
1/17/24 5:00:16 AM	Scheduled Backup	3 Minutes	
1/16/24 7:22:05 AM	Export	2 Minutes	joe
1/16/24 7:17:14 AM	Manual Backup	2 Minutes	joe
1/16/24 7:17:05 AM	Multi-Record Restore	<1 Minute	joe
1/16/24 7:08:38 AM	Manual Backup	2 Minutes	joe
1/16/24 5:00:17 AM	Scheduled Backup	3 Minutes	
1/15/24 1:21:36 PM	Metadata Compare	1 Minute	ke
1/15/24 11:59:08 AM	Multi-Record Restore	<1 Minute	Ch
1/15/24 6:00:15 AM	Scheduled Backup	3 Minutes	
1/15/24 3:14:31 AM	Metadata Compare		kar
1/14/24 6:00:15 AM	Scheduled Backup	2 Minutes	

3. Filtered results display:

The screenshot displays the Spanning Backup for Salesforce Admin interface. The main content area shows a table of activity events. The filter bar at the top indicates 12 of 9950 results are displayed. The table columns are Date, Event, Duration, Actor, and Result. The results show 12 items meeting the filter criteria, all with a 'Success' result.

Date	Event	Duration	Actor	Result
1/6/24 9:33:34 AM	Metadata Compare	4 Minutes	joe.sc...jh@spanning.com	Success
1/5/24 9:18:28 AM	Metadata Compare	<1 Minute	joe.sc...jh@spanning.com	Success
1/5/24 8:48:13 AM	Metadata Compare	<1 Minute	joe.sc...jh@spanning.com	Success
12/27/23 1:26:17 AM	Metadata Compare	2 Minutes	joe.sc...jh@spanning.com	Success
12/14/23 7:23:54 PM	Metadata Compare	<1 Minute	joe.sc...jh@spanning.com	Success
12/14/23 3:16:06 AM	Metadata Compare	2 Minutes	joe.s...jh@spanning.com	Success
12/5/23 2:45:03 PM	Metadata Compare	<1 Minute	joe.s...jh@spanning.com	Success
11/21/23 12:17:49 PM	Metadata Compare	<1 Minute	joe.s...jh@spanningd.com	Success
11/15/23 7:15:08 AM	Metadata Compare	<1 Minute	joe.sc...jh@spanning.com	Success
11/13/23 5:41:05 AM	Metadata Compare	2 Minutes	joe.s...jh@spanning.com	Success
11/7/23 5:50:59 AM	Metadata Compare	<1 Minute	joe.s...jh@spanning.com	Success

Helpful Resources

Check out these additional resources:

- Knowledge Base – Search through articles in our [Spanning Backup for Salesforce Knowledge Base](#) to find answers to the most common user questions.
- Email Support – If you can't find the answer to your question or need further help, please don't hesitate to contact us via email at support@spanning.com.
- Privacy – Spanning takes privacy seriously. Read our Privacy Policy at <https://spanning.com/privacy-statement/>.
- Security – Spanning Backup employs multiple layers of operation and physical security to ensure the integrity and safety of your data. Read how we protect your data at <https://spanning.com/data-protection-security/>.

About Spanning

Spanning Cloud Apps, a Kaseya company, is the leading provider of backup and recovery for SaaS applications, helping organizations around the globe protect their information in the cloud. The company provides powerful, enterprise-class data protection for Microsoft 365, Google Workspace, and Salesforce. With data centers located in North America, the EU, Canada, and Australia, Spanning Backup is the most trusted cloud-to-cloud backup solution for thousands of

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companies and millions of users around the world. Learn more at www.spanning.com. Follow Spanning on Twitter [@spanningbackup](https://twitter.com/spanningbackup).