Cloudfinder
for Salesforce

Cloudfinder
DISCOVER · BACK UP · STAY INFORMED

Contents

Getting started with Cloudfinder for Salesforce   **1**

Sign up – New Cloudfinder user

Signing up for an account is the first step to get started with Cloudfinder for Salesforce. Go to the **Cloudfinder for Salesforce** product page and sign up for a trial. You will be redirected to a web page where you can create your organization's Cloudfinder account:
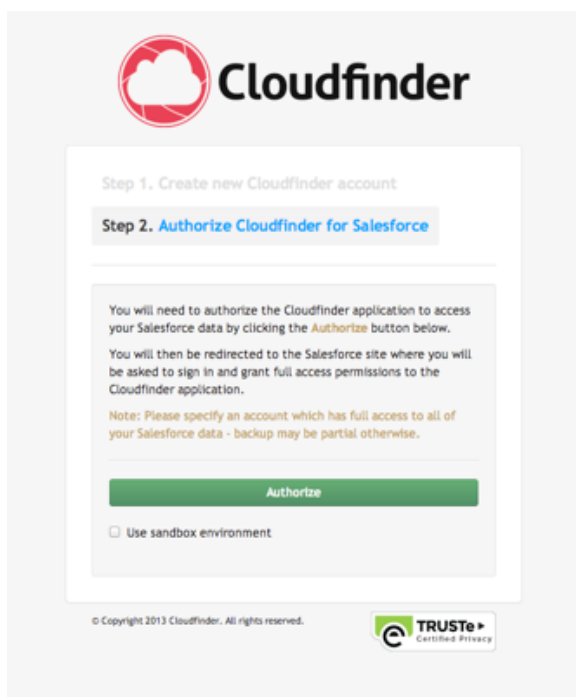

Step 1 - Provide the following information
  • Email address
  • Company name
  • Password
  • Confirm password

Click the **Proceed to Authorization** button. Your new Cloudfinder account is created. The next step is to authorize Cloudfinder to access your Salesforce account.

Step 2 - You will need to authorize the Cloudfinder application to access your Salesforce data by clicking the **Authorize** button. If you are using a Salesforce sandbox environment, select the 'Use sandbox environment' setting.

Note: Please specify an account that has full access to all of your Salesforce data – your backups may be partial otherwise.

Sign up – Existing Cloudfinder user

If you already have a Cloudfinder account you can activate backups for your Salesforce account with a few simple steps. Log in to Cloudfinder, go to the **Settings** page, and click the **Add service** button. You will be redirected to a new window where you will need to enter information required to authorize Cloudfinder to access your Salesforce account.

Setting up Cloudfinder access

The Activate button will redirect you to the Salesforce login page, where you will be asked to sign in. By signing in you will grant access permissions to the Cloudfinder application.
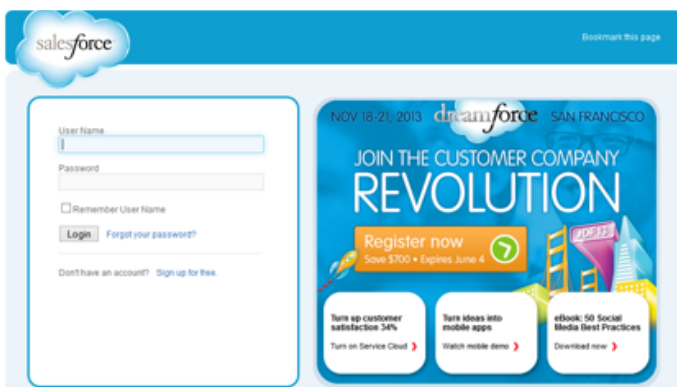
Note: *It is recommended that you log in with an administrator account of the Salesforce organization in order for Cloudfinder to be able to access all the information needed for backups. Using a non-administrative account may result in partial backups of your Salesforce data.*

Note: *API must be enabled.*

If you are using a trial version of a Salesforce account, contact Salesforce support and request to have the API on your account enabled prior to configuring the connection between Cloudfinder and Salesforce.
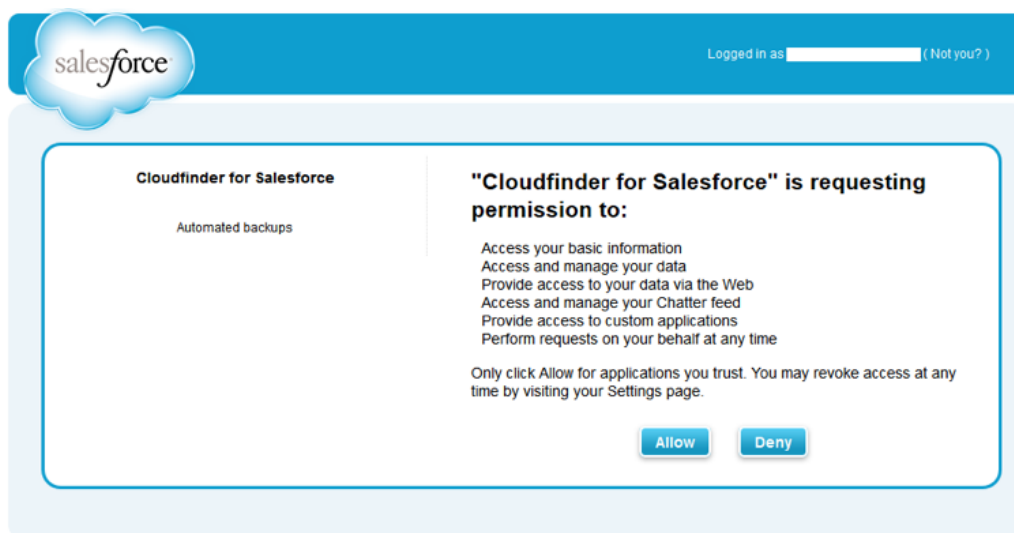
Click **Allow** to grant Cloudfinder the appropriate permissions.

After the completed configuration you will be returned to the Cloudfinder web site. After this, you can continue to your Cloudfinder dashboard to start using your account.

Note: *To increase your daily API call limit, contact Salesforce support. You can check how many API calls that are available and used in your Cloudfinder account settings.*

4

Initial Backup

By performing a successful setup as explained above, an initial backup for your Salesforce account is automatically started. This initial backup may take some time, depending on the amount of documents and data you have in your Salesforce account.

Note: *Cloudfinder for Salesforce backs up the data for all of the users available in your Salesforce account.*

First log-in

If you have chosen to continue to your Dashboard from the Setup complete! page, you will automatically be logged in and taken to the Cloudfinder Dashboard.

You can access your account at any time by clicking on the Login button in the upper-right corner of our **web page**.

You will be redirected to the login page, where you enter your credentials.
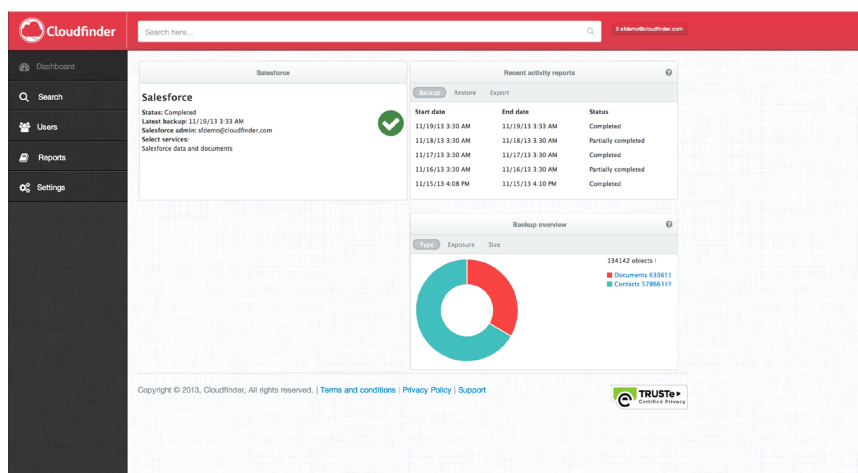
Inside Cloudfinder   2

Dashboard

Once you log in, you will see the Cloudfinder Dashboard - the main location that gives you a general overview of all selected options and jobs connected with your account. It is divided into three sections:

- Your Cloudfinder account
- Recent activity reports
- Backup overview

Your Cloudfinder account

Currently, Cloudfinder supports Salesforce, Google Apps, Office 365 and on-premise data through Cloudfinder Connect. If your account is configured only with the Salesforce service, you'll see only this service listed in the active services section.
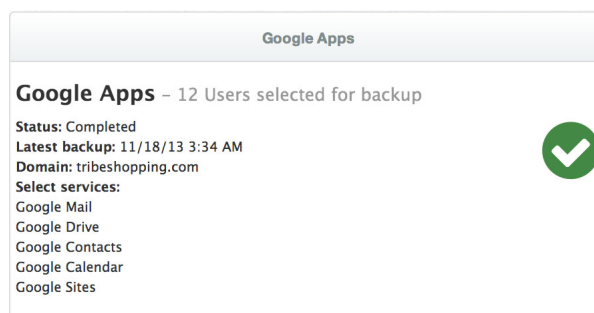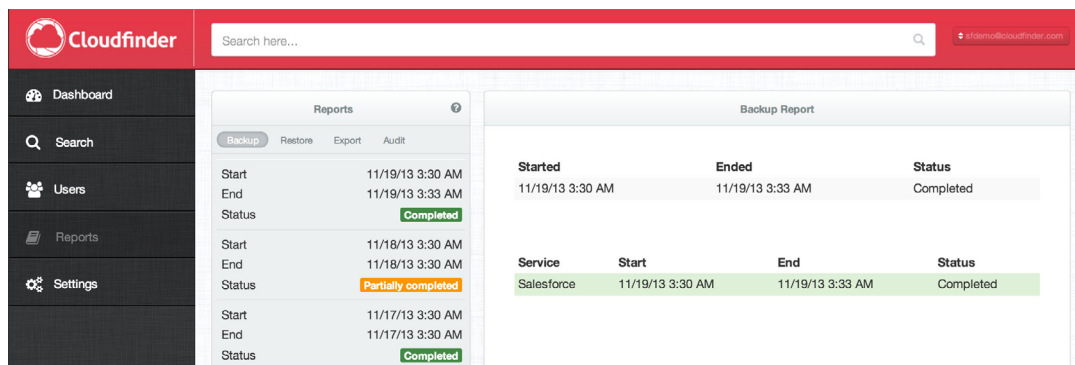
Recent activity reports

Here you can view the statuses of all recent jobs on your account and the time passed since the last backup job. The status of the recent Backup, Restore, and Export jobs are shown in separate tabs, so you can easily switch between them.

As these sections list only the last five jobs, you can see the status of all the performed jobs (Backup, Restore, or Export) by clicking on **Reports** in the main menu. Reports will be explained in detail later.

This option will display a backup history list that contains brief details of the backup jobs in your account.

Every record is a link to the details for the selected job, including specific information for the active services. If you only have Salesforce active in your account, the details will include information for that service only.

Backup overview

The chart present information about the type and size of data and documents of the backed-up data.
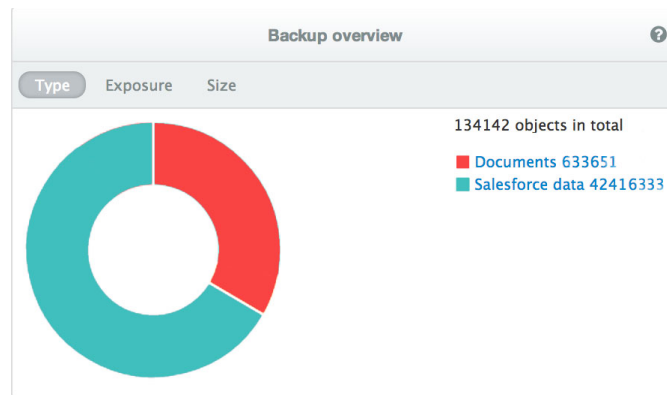

Clicking on the highlighted text will redirect you to the Search page, where all of the items that meet the selected search criteria, such as a specific document type or a database record, are listed. The **Search** function is explained in detail in the next section.

Searching through Cloudfinder

The Search functionality is one of the core features of Cloudfinder, as it allows the user to search through all of the backed-up data. The easiest way to search for data containing a specific keyword is to click on the **Search here** field on the red banner at the top of the page. This banner is always visible at the top of the page, so it is easily accessible, even if you are scrolling down a long page with many search results.

After clicking on the empty field, an empty search result list will appear, which will be dynamically updated as you type in your keywords.
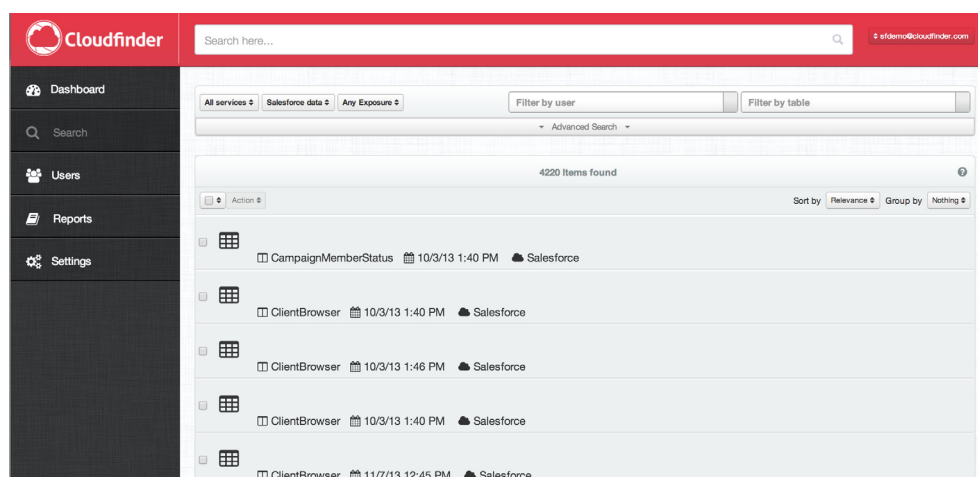
Once the search results are shown, you can further filter the list by applying any of the available filters:
- Type:
  - Documents
  - Salesforce data
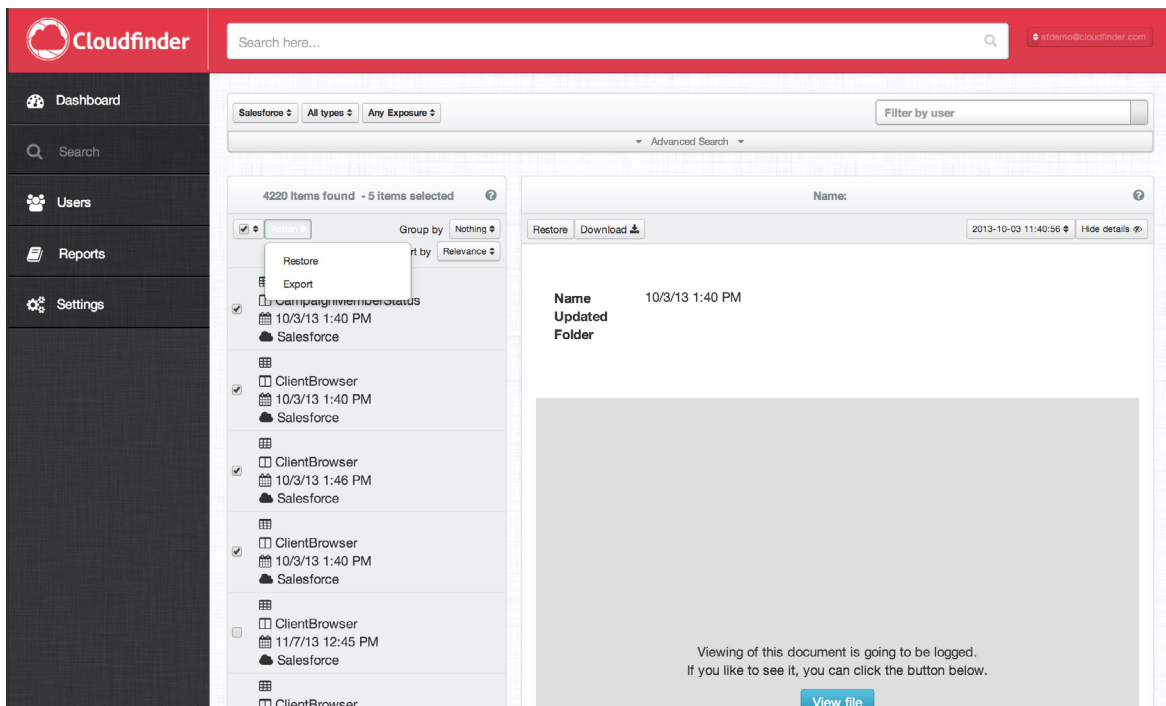- Table name

You can also:
- Sort the search results by:
  - Relevance
  - Date
- Group the search results by Type

Note: When Salesforce data is selected, the filter Table is activated showing a drop-down list containing all available table names. If a specific table is selected, only records belonging to that table are shown.

Note: The items available for selection in the filter's drop-down menus depend on the backed up data. For example, if you do not have any events or contacts in your backups, these filter options will not be available for you under that type filter.

By clicking on any object in the **Items found** list, a detailed view for the specific object will be presented. This view also shows the available actions that can be done with the selected object, such as:
- Restore
- Export
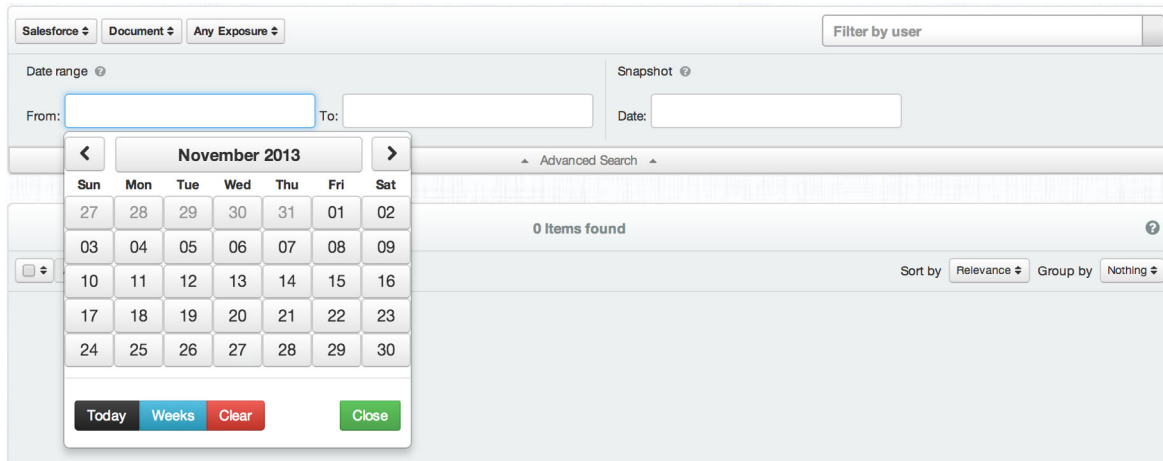- Download
- View file

You also have the option of selecting multiple items from your search result list for bulk actions.

Advanced search options

Cloudfinder offers additional options to perform advanced searches. To access the advanced search options, click on the **Advanced Search** bar.

This will present two additional filtering options:

- Date range
- Snapshot

If you select **Date range** the results will show objects that were included in the backups during the selected period. The start (From) and end (To) date can be selected by clicking in the **From** or **To** field. By clicking in the **Date** field, you can choose the exact date from the calendar that will appear.

With the Snapshot option you can choose the exact date from the calendar that will appear. After choosing the date, you can choose the hour and minute of the snapshot by navigating with the arrows. This will filter the shown items and present only the ones that were included in the backup created at that time.

Download, Restore and Export

Download, Restore, and Export options allow you to restore or download a copy of any version of any object from your backed-up data, restore documents to any of the user accounts in your Salesforce account, or Export bulk selections as a zip-file. The steps to perform these functions are described below.

Download single items

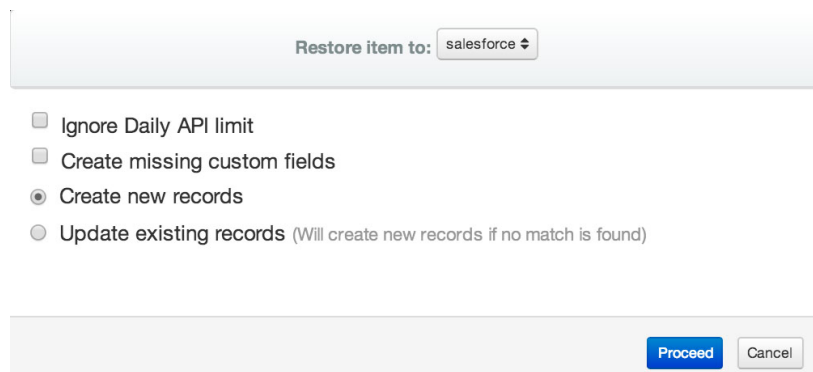To download a single item from your backup, follow these steps:
- Find the desired item using the available search options.
- From the list, click on the item you want to download.
- In the details page, choose the desired version (if there are more than one versions of the item).
- Click on the Download button.
- The item will be downloaded to the Downloads folder on your computer.
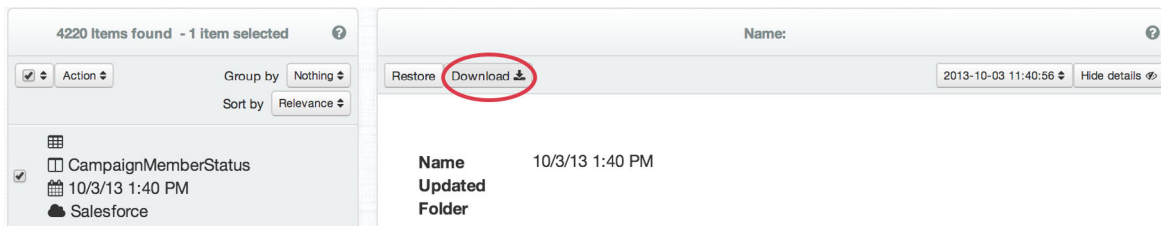
Restoring single or multiple items

To restore single or multiple items from your backup, follow these steps:
- Find the desired item(s) by using the available search options.
- From the search results list, select the item(s) you want to restore.
- After selecting the items, click the **Action** button and choose **Restore** from the drop-down list.
- From the pop-up window, select if you want to create new objects or update existing objects.
- You can also choose whether to **Ignore the daily API limit** and **Create missing custom fields**.
- Click on the **Proceed** button to start the restore process and confirm the restore by clicking the **Restore** button in the last pop-up window.
- If your selection includes documents, select which Salesforce user to restore to.

Export single or multiple items

To export single or multiple objects from your backup, follow these steps:
- Find the desired objects by using the available search options.
- From the search results list, select the object(s) you want to download.
- After selecting the items, click on one of them to get to the next view.
- Click the **Action** button and select **Export** from the drop-down list.
- A confirmation window will appear, asking if you want to continue. Click the **Export** button to confirm.
- The cerated zip-file can be found on the Dashboard, under **Recent activity reports** or in the Reports page under the **Export** tab. Here, you have an option to:
  - check the status of the export job
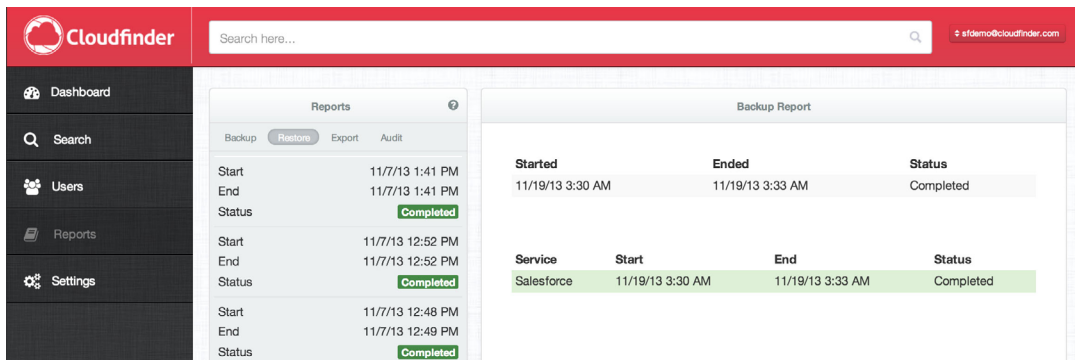 - delete the exported file

Note: The zip-file is available for downloading seven (7) days after the export job was started. After that period, the file is automatically deleted.

11

Reports

On the Reports page you can see logs for all your activities. There are separate tabs for backups, restores, exports and audits.

Backup and restore logs

The backup and restore tabs show the start and end time for the job, down to the minute. It also shows the status: if it was completed or partially completed. Finally there is information about for which service the backup or restore has been done. If you only have backup for Salesforce, then that is what it will say.

Export logs

The export tab contains the same information as the backup and restore tabs. The only difference is that you can choose to delete the export if you want.
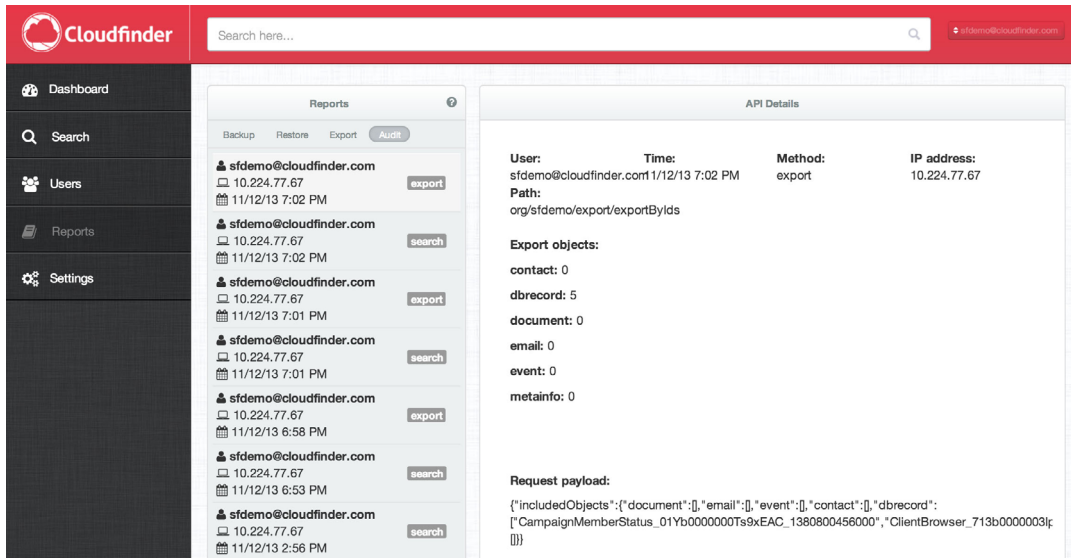
Audit Logs

These logs contain information for every action performed on your account, including:

- Time and Date when the action was performed.
- Method of the performed action.
- The user (Username) that has performed the action.
- Information about the API call for the performed action.
- IP address of the system on which the action was performed.
- The session ID in which the action was performed.

Cloudfinder account settings 3

Settings

Clicking on Settings in the main menu accesses your Cloudfinder account settings. This page contains information related to your Salesforce account such as:

- The Authorized Salesforce account.
- Number of Salesforce users.
- API usage including:
  - Daily Salesforce maximum API calls,
  - Daily Cloudfinder API limit,
  - API calls used during the day.
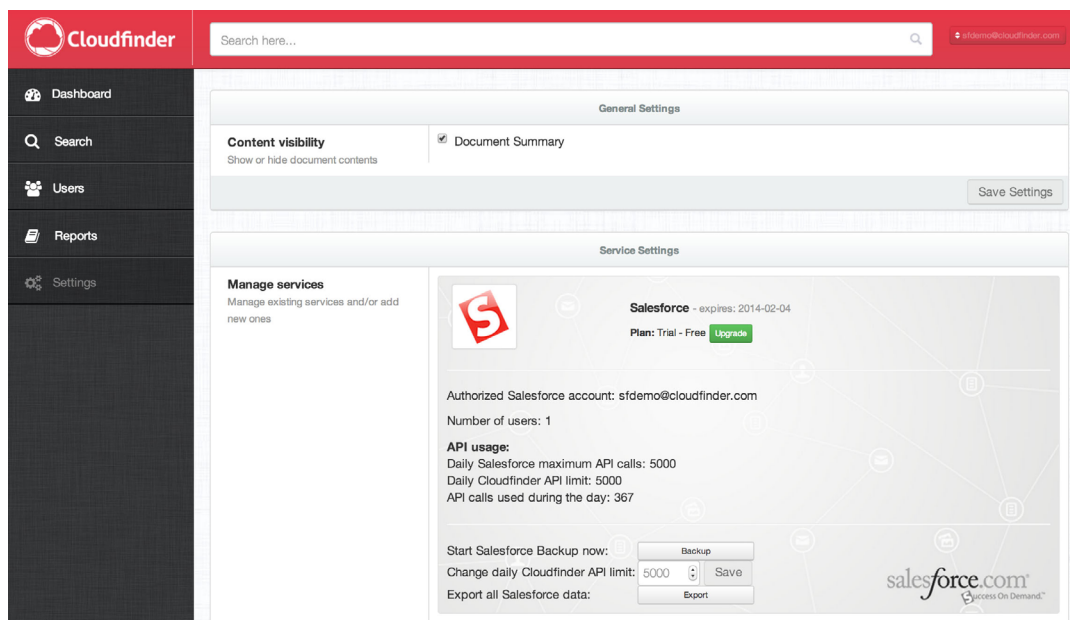
You can choose to start extra Salesforce backups, change the daily API limit and to export all Salesforce data by clicking the Export button.

In Settings you can also add other services to your Cloudfinder account, such as Google Apps annd Office 365. 30 day free trials are available.

Users

In the main menu there is a Users menu item. The page lists all the Salesforce users that are being backed up by Cloudfinder. This information is replicated on the Settings page in the form of the number of Salesforce users your account comprises.

15

Cloudfinder

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