

Veeam Backup *for Salesforce* 1.0 Release Notes

This document provides last-minute information on Veeam Backup *for Salesforce* 1.0, including system requirements, installation, as well as relevant information on technical support, documentation, online resources and so on.

The release version of Veeam Backup for Salesforce 1.0 (1.0.2.1992) is available for download at <https://www.veeam.com/backup-salesforce-download.html> starting from February 20, 2023.

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System Requirements

Salesforce

- *API version:* Salesforce API v55 is the highest supported API version for this release. Salesforce editions with API access are required. The list of editions is posted in Salesforce documentation <https://help.salesforce.com/s/articleView?id=000385436&type=1>. The product has been tested for Salesforce Sales Cloud and Salesforce Support Cloud objects only. See the list of known issues for additional details.

The Salesforce backup user must have an English locale and language set up in Salesforce user settings.

Veeam Backup for Salesforce Server

Hardware

- *CPU:* modern multi-core x64 processor, 4 CPU cores minimum and additional 1 CPU core per protected Salesforce organization
- *Memory:* 6 GB RAM (minimum) and additional 2GB RAM per each protected Salesforce organization
- *Disk:* 10 GB of storage, excluding Salesforce data storage space

OS

The following 64-bit versions of operating systems are supported:

- CentOS 7
- RedHat Linux 7, 8
- Oracle Linux 7, 8

Software

- Linux system locale must be set to UTF-8
- Nginx repository needs to be configured.
- User interface requires the latest version of either Microsoft Edge, Mozilla Firefox or Google Chrome.
- For more information on the open ports configuration, see <https://helpcenter.veeam.com/docs/vbsf/userguide/prerequisites.html?ver=10>

PostgreSQL Server

Hardware

- *CPU:* modern multi-core x64 processor, 4 CPU cores minimum.
- *Memory:* 8 GB RAM minimum. Consider allocating 16 GB RAM if the largest Salesforce object you have contains under 2M records, and 32GB RAM or more if you have objects with over 20M records.
- *Disk:* Flash/SSD-based storage system. Database server storage sizing must take into account the volume of your Salesforce data storage, daily change rate and the rate of replication. Data storage in Salesforce would require 1.6 times more storage in PostgreSQL.

Software

- PostgreSQL 12-14

Known Issues and Limitations

The following is a list of issues known to exist at the time of the Veeam Backup *for Salesforce* 1.0:

General

- User Interface access with Chromium or Firefox on Linux is not supported.
- Linux system locales different from UTF-8 are not supported on the management server.

Backup and Restore

- Newly released Salesforce objects on API v56 and later are not supported, for example *PendingOrderSummary*.
- Backup and restore is not available for these objects:
 - BigObject type.
 - Idea and related objects.
 - FeedAttachment.
- The following objects are backed up, but not available for restore wizard. These can be manually restored back to Salesforce:
 - Field Service related objects.
 - EmailCapture
 - MobileApplicationDetail
 - MailmergeTemplate
 - QuoteDocument
 - ContentNote
- The following field types are not backed up:
 - Encrypted
 - Custom address
 - Custom geolocation
- ContentDocumentLink backup will always report updated items since this is how the increment is calculated for this object.
- Salesforce object backup may fail with a Salesforce error [Got an unexpected error while processing BULK-API. Contact support with error ID: 470xxx484-7xxx2 (101xxx842)]. You are advised to contact Salesforce support to resolve this specific issue on your instance.
- Disabling of Flow will fail if the maximum versions limit is reached in Salesforce. Flow limits described here https://help.salesforce.com/s/articleView?id=sf.flow_considerations_limit.htm&type=5
- Disabling of lookup filters and validation rules will fail if 10 filters are already defined in Salesforce.
- Use Filter Logic is limited to 9 logical conditions.

Miscellaneous

- For Azure AD groups, email alerts are only sent when the Azure AD group has the default email address specified during the user provisioning.
- Downloading CSV incorrectly saves non-latin characters.

Installing Veeam Backup *for Salesforce*

- Set Linux system locale to UTF-8

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

- Reboot the system to apply the new locale settings.
- Download and install the Veeam Repository from <https://www.veeam.com/backup-salesforce-download.html>

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

- Install the latest product package for your platform.

```
sudo yum install vbsf
```

- After the rpm installation, follow the instructions and run the configuration script to configure log rotation, nginx setup, postgresql.

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

Alternatively, you can download and run the install script that will automate all steps above for you.

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

- When the configuration is complete, open the generated URL in your browser and finish the initial setup wizard.

Uninstalling Veeam Backup *for Salesforce*

- Uninstall the product package

```
sudo yum remove vbsf
```

- Package manager will not remove the data repository located in /opt/vbsf/vbsf-backup/data. You will need to manually delete this folder.
- Package removal will not delete any databases as well. You will need to delete the backup databases manually.

Licensing

Veeam Backup for Salesforce is licensed per User which is an active Salesforce User license reported by the Salesforce platform. 100% of active Salesforce Users must be licensed in order to back up a Salesforce org. Veeam Backup for Salesforce is currently using a stand-alone license and it is not part of the Veeam Universal License.

The Community edition license for 50 Users is built into the product. It allows protecting Salesforce organizations with up to 50 active users. That means, if you have 2 Salesforce organizations with 20 Users, you can protect both with one Community edition license.

Subscription, Evaluation and NFR licenses are supported by the product. During license installation, the license must be activated against Veeam Licensing Servers that will validate, meter, and update the license details as needed.

Product Features

Backup

Create Flexible Backup Policies

Protect Salesforce data, metadata, and files by creating a backup policy that includes main schedule for data, files and metadata backup, as well as additional custom schedules per Salesforce object. Schedules are defined individually for each protected Salesforce Org.

Back up Incremental Changes

After the initial full data sync, the backup policy will only collect incremental changes, and this allows the backup to complete much faster. Records that are changed between policy runs will be stored as full records in the historical data tables. Metadata objects are stored on the file system storage. Records increment collection relies on SystemModStamp field value whenever it is possible, otherwise it will select by the LastModifiedDate. Metadata backup relies on LastModifiedDate to collect the changed objects. When this parameter is not available, the component will be downloaded in full.

Set Custom Schedules per Object

You can choose to protect objects with a schedule, different from the main schedule of the backup policy, or exclude objects from backup completely. For example, when your entire Salesforce is backed up daily, you can choose to protect Opportunities, Contracts, Accounts, and related objects every 10 minutes. Keep in mind that for the consistent restore of selected objects, you need to have the dependent objects on the same schedule.

Optimize API Usage

Backup service will detect when to use bulk API vs rest API or SOAP. Depending on type of the object and the increment size, the optimal API will be used.

Discover New Objects and Fields

When you add a field and data to the existing object, or add a whole new custom object, this can be protected automatically by the backup policy.

Set Data Retention

Since you control the data and the infrastructure, it is up to you to define the retention for that data. You can separately set retention schedule for objects, files, and file versions. It is recommended to leverage Veeam Backup & Replication for implementing the backup copy jobs and long-term archival on cloud storages.

Limit Maximum API Usage

Avoid hitting the Bulk API limit or the daily API limit by specifying the maximum API consumption threshold in % of total available limit for the org. Available API limits are controlled before each policy start and during the policy session. When the threshold is reached, the policy will stop or fail to start. When Salesforce will add some API calls back and the next scheduled run will attempt to start, the backup operation will resume.

Detect Hard-Deleted Items

Daily and weekly validation job will run to compare data for the past week or month with the source Salesforce org, in attempt to detect and mark hard-deleted records in the backup.

Restore

Restore Records, Files and Metadata

Leverage an easy-to-use wizard to restore data back to Salesforce. Browse and select for restore full records, files, records hierarchy, selected field values only, or metadata.

Restore Field Values

When you need to quickly revert a massive change and restore a few selected fields back to previous value from the backup, use the field restore option of the restore wizard. Data search filters will help to pinpoint the records and select them all for restore. If you have a csv list with record IDs, you can specify the values as a filtering condition.

Restore Hierarchy

To recover from an incorrect Account merge or another change with cascading deletion or update, you can restore the hierarchy for any record. Drill down and select specific child hierarchy branches and at a depth you need to restore or leave it undefined and restore the entire records tree as it was in the corresponding backup. You can even restore parent records and relationships.

Restore Versions

As you back up your data and changes are detected, the complete snapshot of each record will be saved independently into the history table for this object. During restore, you can choose the version you would like to restore from. Each record in the restore job can have its own restore point and you are able to visually see the differences between record versions to make sure you are selecting the correct one for the restore.

Restore Profiles

Salesforce user profiles are not described by a single metadata type but contain a collection of settings across the configuration – tab visibility, custom object access, field access, etc. Veeam Backup for Salesforce greatly simplifies protection of profiles by creating a synthesized backup package that you can restore with a few clicks. As you restore profiles, this package is deployed, and all dependent elements are restored.

Safeguard restores with limits

Use advanced settings to limit how many records can be submitted for a restore job. These controls are especially important for record restores with hierarchy when the hierarchy tree may span thousands of records.

Automatically Disable Flows, Validation Rules, Apex Triggers

Business logic and automated rules can block restores or trigger undesirable side processes during the data restoration. You can choose to manually handle the Salesforce automation exceptions or let the product to disable all triggered automation permanently or temporarily for the user that is executing the backup and restore operation.

Override Field Values on Restore

Simple rules can help you override certain field values during the restoration, or even use the pattern with the old value. This may be helpful for tagging the restored records, setting some boolean values that trigger or disable automation, or fill the custom values for picklists.

Map Fields on Restore

It may happen that one field was replaced by another field over time. As you restore, you can map fields from the backup to live fields in Salesforce to restore values into the new fields.

Overwrite or Skip Values

You can instruct the restore job to skip records with IDs that exist in Salesforce or overwrite those records with backup data.

General

Salesforce Organizations and Companies

Larger companies may need to protect multiple production Salesforce organizations. To protect multiple Salesforce organizations, simply add and configure new backup policies. Once you have several backup policies, you may want to segregate users and roles inside the application to allow some people to manage only certain Salesforce backups.

Create Companies to simplify granting permissions to users and groups inside Veeam Backup for Salesforce.

Users and roles

Enable user roles by configuring the Azure AD connection and provisioning users or groups to the application roles. There are 4 roles available - Administrator, Backup Operator, Restore Operator and Viewer. You can assign those roles per Company or per Salesforce organization.

Email and Slack Alerts

To stay up to date on backup and restore status, administrators have an option to configure alerts for certain events. Alerts can be sent on backup policy status, restore policy status, license check, file repository storage space and connection status for Salesforce organizations and databases. Backup policy and restore job alerts are configured for selected user roles and can be limited to several Salesforce organizations, or companies, or sent to all roles in all organizations.

Technical Documentation References

If you have any questions about Veeam Backup for Salesforce, you may use the following resources:

- Product web page: <https://www.veeam.com/backup-salesforce.html>
- User guides: <https://www.veeam.com/documentation-guides-datasheets.html?prd=vbsf>
- Veeam R&D forums: <https://forums.veeam.com/>

Technical Support

We offer email and phone technical support for customers on maintenance and during the official evaluation period. For better experience, please provide the following when contacting our technical support:

- Version information for the product and all infrastructure components.
- Error message and/or accurate description of the problem you are having.
- Log files.
To export the log files, select **Configuration** > **About** > **Support** and follow the wizard to export the relevant set of log files.

To submit your support ticket or obtain additional information please visit www.veeam.com/support.html.

Contacting Veeam Software

At Veeam Software, we pay close attention to comments from our customers – we make it our mission to listen to your input, and to build our products with your suggestions in mind. We encourage all customers to join [Veeam R&D forums](https://forums.veeam.com/) and share their feedback directly with the Product Management team.

Should you have a technical or licensing issue or question, please feel free to contact our Customer Support organization directly. We have qualified technical and customer support staff available 24 hours a day, 7 days a week who will help you with any inquiry that you may have.

Customer Support

For the most up to date information about our support practices, business hours and contact details, please visit www.veeam.com/support.html. You can also use this page to submit a support ticket and download the support policy guide.

Company Contacts

For the most up to date information about company contacts and office locations, please visit www.veeam.com/contacts.