



HYCU for Salesforce

R-Cloud Module Guide

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About the module

With the R-Cloud (formerly HYCU Protégé) module for Salesforce, you can back up your SaaS application data securely and efficiently.

Prerequisites

Before you add the module to R-Cloud as a source, the following prerequisites must be fulfilled:

- Get your Salesforce domain URL. For details on how to get or change your Salesforce domain, see Salesforce documentation about my domain.
Note In Salesforce, the domain URL does not include the `https://mydomainurl` part. Make sure the domain URL is complete when adding the module as a source to R-Cloud.
- Get your Salesforce client ID and client secret. For details on how to do this, see Salesforce documentation about rotating the consumer key and consumer secret of a connected app.
- In Salesforce, configure a connected app for the OAuth 2.0 credentials flow. For details, see [Configuring a connected app for the OAuth 2.0 credentials flow](#).

Configuring a connected app for the OAuth 2.0 credentials flow

To configure a connected app for the OAuth 2.0 credentials flow, follow the steps described in Salesforce documentation.

When configuring the necessary OAuth settings for the connected app in Salesforce, use the following module-specific settings:


- Select **Enable OAuth settings**.
- Enter the **Callback URL**:
 - *For the sandbox instance:*
`https://test.salesforce.com/services/oauth2/callback`

- *For the developer instance:*
<https://login.salesforce.com/services/oauth2/callback>
- In the Selected OAuth Scopes, select **Add Manage User data via APIs (api)**.
- Select **Enable Client Credentials Flow**.

For details, see Salesforce documentation about enabling OAuth settings for API integration.

When configuring the access policies for the connected app in Salesforce, use the following module-specific settings:

- Select the following permitted users policy: **Admin approved users are pre authorized**.
- Select the profile. Choose the profile of the user who will manage the login.
- Under the Client Credentials Flow, select the system administrator user to be added for the client credentials flow.

 **Note** If the Connected Apps feature is not enabled in your organization, contact Salesforce support to activate it.

Limitations

When adding the module to R-Cloud and protecting the related SaaS application, the following limitations apply:

- Only the updateable fields can be restored.
- After a restore, the object IDs will be different because the objects are recreated.
- For the Entitlement Contact object, the Name field cannot be updated. As a result, its value will change after the restore. The value of the Name field is determined by Salesforce.
- When performing the object-level restore, only the parental relations will be maintained. The child relations will not be restored.
- If there is a missing parent record, the deleted child object will not be restored. To resolve such an issue, run the organization-level restore.

Recommendation

Set the Salesforce session inactivity timeout period to 1 hour to avoid session timeout failures. For details on how to update the sessions settings, see Salesforce documentation.

Protecting data

R-Cloud starts protecting your Salesforce data after you add the module as a source.

The module allows you to protect the following data objects:

- Account
- Campaign
- Campaign Member
- Case
- Contact
- Entitlement Contact
- Entitlement
- Lead
- Opportunity
- Opportunity Contact Role
- Partner
- Product
- Pricebook
- Pricebook Entry
- Solution
- All custom objects

The module allows you to protect the following metadata types:

- Custom Object
- Custom Tab

- Layout
- Profile
- Settings

For details on how to add the module as a source, see *HYCU R-Cloud Help*.

Backing up data

After adding the module as a source, your Salesforce organization will be automatically discovered.

For details on how to configure the backup for the SaaS application data, see *HYCU R-Cloud Help*.

Restoring data

As a part of the restore you can perform the complete and granular restore of all the supported data objects.

When performing an object-level restore, make sure all the referenced records of the parent object are present in your Salesforce instance. All the records with references to the non-existing parent object records will be excluded during the restore.

Example

Account is a parent object of Contact. If Contact has 100 records, out of which 20 records refer to the non-existing parent Account records, those 20 Contact records will be skipped during the restore unless the Account object is restored first.

⚠ Caution If the Salesforce records are inconsistent with respect to the configured validation rules or triggers, there is a possibility of a partial restore. To avoid such an issue, correct the inconsistent records or disable the validation rules, triggers, or process builders.

For details on how to restore the SaaS application data, see *HYCU R-Cloud Help*.

Provide feedback

For any suggestions and comments regarding this product or its documentation, send us an e-mail to:

info@hycu.com

We will be glad to hear from you!

