



Flosum Backup & Archive

User Guide

*A Quick Start Guide to Implementing and
Using Flosum Backup & Archive*

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Flosum Backup & Archive User Guide

Version: 4.x | **Audience:** Admins, Architects, Compliance Officers

Overview

Flosum Backup & Archive (B&A) is an enterprise-grade data protection solution built specifically for Salesforce environments. It enables you to back up, restore, and archive your Salesforce data and metadata securely, efficiently, and on your terms.

Whether you're safeguarding against data loss, reducing Salesforce storage costs, or meeting compliance requirements, Backup & Archive provides flexible options to protect your most critical assets.

Built on Salesforce and AWS, it provides AES-256 encryption, customizable retention, and easy restore options—ensuring data protection, compliance, and business continuity.

This guide walks you through the installation and use of Flosum Backup & Archive.

Key Sections

[Set Up Your Tenant](#) - Register for Flosum Backup & Restore and add your Salesforce Org.

[Backup Operations](#) - Backup of your Salesforce Org with full or partial backups.

[Archive Operations](#) - Archive your Salesforce data to save space and remove old objects.

[Restore Operations](#) - Restore lost or corrupted Salesforce data.

[Search Operations](#) - Search for and purge backed-up and archived data.

[Export Operations](#) - Export your backed-up data.

[Analytics](#) - Review charts of your backup operations and visualize your Salesforce data.

Prerequisites and Planning for a Successful Backup & Archive Implementation

Before implementing Flosum Backup & Archive, it's essential to align your environment with a few key prerequisites. These steps help ensure your deployment is secure, compliant, and optimized for performance, whether you're running a trial or rolling out organization-wide.

We recommend collaborating with your internal Salesforce Admin and Security teams early in the process to streamline setup and ensure long-term success.

Salesforce User Configuration

To ensure smooth connectivity and access to all relevant data, Flosum Backup & Archive requires a dedicated generic user with the following settings:

- Use a **Salesforce Standard License** (not Community or Platform)
- Assign the **System Administrator profile** with permissions for:
 - API Enabled
 - Query All Files
 - Manage Flows
 - Query All Files
 - Set Audit Fields Upon Record Creation
 - View All Data / View All Files (if applicable)

i Using a dedicated generic user ensures continuity—if a personal admin account is deactivated, backup jobs may fail. A separate generic user also improves auditability and access control. You can also add additional users to the Backup & Archive solution through the User Pool Service to assist with administering your backups.

Network Access and Allowlisting

To maintain secure and reliable connectivity between Salesforce and the Flosum platform, your organization should allowlist specific domains in your firewall, proxy (e.g., Zscaler), and email filtering tools.

Also, allowlist these email domains to ensure delivery of system notifications:


- @flosum.app
- @flosum.com
- @flosum.tech

i Missing alerts or authentication traffic can delay the implementation and verification of backups.

Encryption Key Requirements (BYOK)

Flosum supports Bring Your Own Key (BYOK) for AES-256 encryption, giving you complete control over your data privacy posture. To enable BYOK, your team must:

- Provide a 32-byte Base64-encoded encryption key
- Use a secure internal key management system (Flosum never stores your key)

 BYOK enables your security team to define and enforce key rotation and storage policies that align with internal governance and regulatory standards.


SSO and Identity Provider Integration

For secure, centralized access control, Flosum supports Single Sign-On (SSO) via standard OAuth providers.

Supported identity systems:


- Google
- AWS Cognito
- Azure Active Directory

SSO configuration and role assignment are managed through Flosum's User Pool. Detailed setup instructions are available in our deployment guides.

 SSO simplifies user management, improves login security, and enables audit-ready access control—all essential for regulated or enterprise environments.

Generate AES-256 Encryption Key

Create an encryption key using your preferred method. Below are some options for generating encryption keys. Once you've created the key, store it securely (e.g., in a password manager). This key will be required during tenant registration and the Connect Org process.

 Never share or email this key. If lost, encrypted data is unrecoverable.

Password Manager (Recommended)

Use a reputable password manager, such as Bitwarden, 1Password, or Dashlane. This is the easiest and safest option for most users.

- Length: 44 characters
- Character sets: A–Z, a–z, 0–9, +, /

- Base64 encoding: Enabled (if the option is available)

Command Line (For Technical Users)

Use OpenSSL to generate a secure key.

1. Open your terminal or PowerShell window.
2. Run the following command: `openssl rand -base64 32`
3. Copy the generated 32-byte key. Store it securely (e.g., password manager).

Python Script

Use Python to generate a secure key.

```
import os
import base64
key = base64.b64encode(os.urandom(32)).decode('utf-8')
print(key)
```

- Copy the generated 32-byte key. Store it securely (e.g., password manager).

Set Up Your Tenant

This section walks you through setting up your tenant, establishing your login credentials, and connecting your Salesforce org. This tenant will act as a secure, dedicated storage container for all your backup data.

Self-Register Your Flosum Tenant

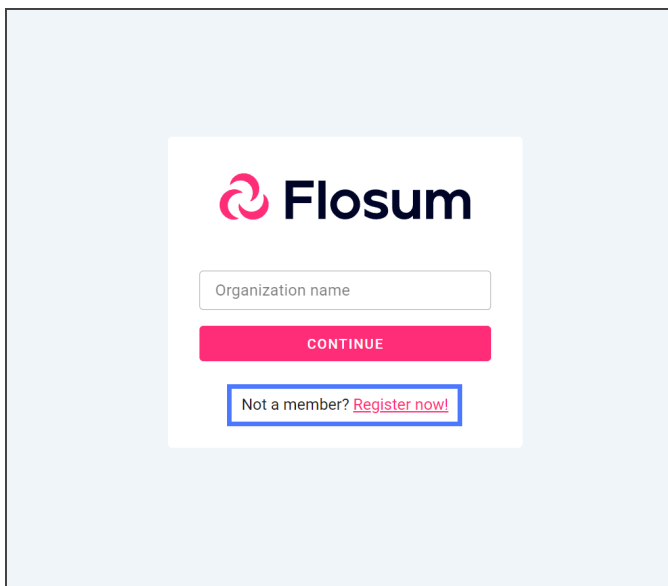
You can self-register to create a tenant on the Flosum regional instance, as well as your admin account on the Flosum User Pool, which you will use in the next step.

You will receive a confirmation email when your tenant is provisioned (typically within 30 minutes). Click the link that is provided to continue.

1. Go to the Flosum Backup & Archive Registration page. Choose the Instance URL for your desired region.

Region	Backup URL
US	backup-us-v3.flosum.app
Germany	backup-de.flosum.app
Japan	backup-jp.flosum.app

2. Click the **Register Now!** link.

A screenshot of the Flosum registration form. The form is centered on a light blue background. It features the Flosum logo at the top, followed by a text input field labeled "Organization name". Below the input field is a red "CONTINUE" button. At the bottom, there is a link that says "Not a member? Register now!" which is highlighted with a blue border.

3. Enter the following details to create your tenant:
 - a. **Organization Name** (Save this name; it will be needed for future logins to the tenant.)
 - b. **First Name**
 - c. **Last Name**
 - d. **Email Address**
 - e. **Password** Use a strong password that is at least eight (8) characters long and includes one (1) letter, one (1) number, and one (1) special character.
4. Click **SIGN UP**.



The screenshot shows the Flosum sign-up form. The Flosum logo is at the top. Below it are five input fields: "Organization name", "First name", "Last name", "Email", and "Password". Each of these five fields has a blue arrow pointing to it from the left. Below the "Password" field is a list of password requirements, each with a checkmark icon: "8 characters", "1 letter", "1 number", and "1 special character". Below these requirements is a "Confirm password" input field, which also has a blue arrow pointing to it from the left. At the bottom of the form is a red "SIGN UP" button, which is highlighted with a blue rectangular border. Below the button is the text "Already a member? [Sign in!](#)".

Log In to the Flosum User Pool (Optional)

If you have Single Sign-On (SSO) or Multi-Factor Authentication (MFA) protocols in place, you may need to access the User Pool Application to configure them.

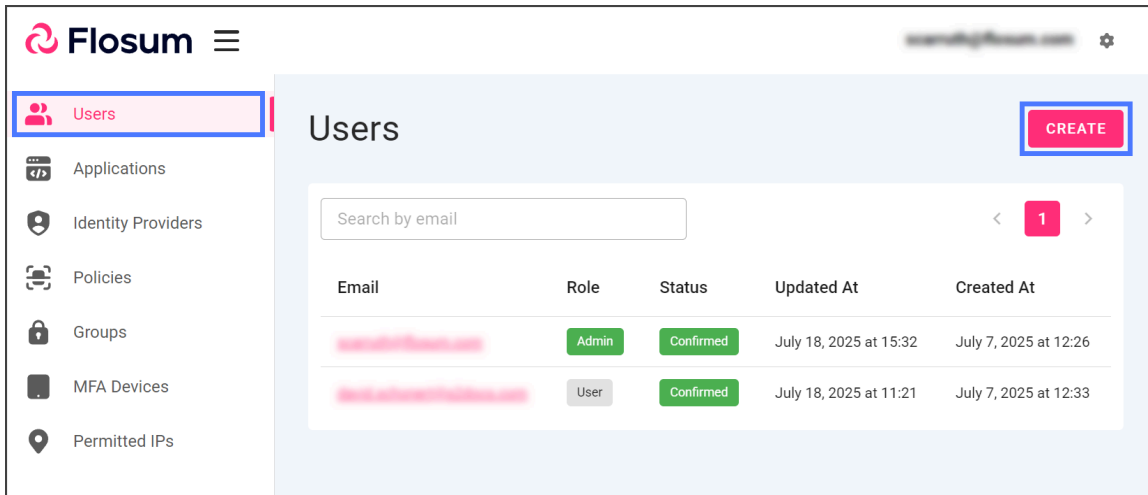
1. Navigate to the User Pool URL corresponding to the region you selected for your tenant creation.

Region	User Pool URL
US	user-pool-us.flosum.app
Germany	user-pool-de.flosum.app
Japan	user-pool-jp.flosum.app

2. Log in with your previously established admin account.

Add Users

1. Click **Users** from the sidebar menu.
2. Click **Create** to add additional users.



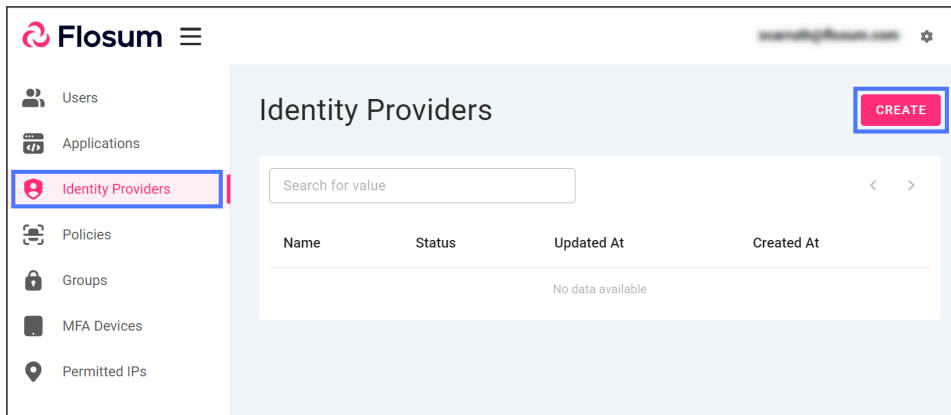
The screenshot shows the Flosum web application interface. On the left is a sidebar menu with the following items: Users (highlighted with a red box), Applications, Identity Providers, Policies, Groups, MFA Devices, and Permitted IPs. The main content area is titled 'Users' and features a 'CREATE' button in the top right corner (also highlighted with a red box). Below the title is a search bar labeled 'Search by email' and a pagination indicator showing '< 1 >'. A table displays the list of users with the following columns: Email, Role, Status, Updated At, and Created At. The table contains two rows of data:

Email	Role	Status	Updated At	Created At
[redacted]	Admin	Confirmed	July 18, 2025 at 15:32	July 7, 2025 at 12:26
[redacted]	User	Confirmed	July 18, 2025 at 11:21	July 7, 2025 at 12:33

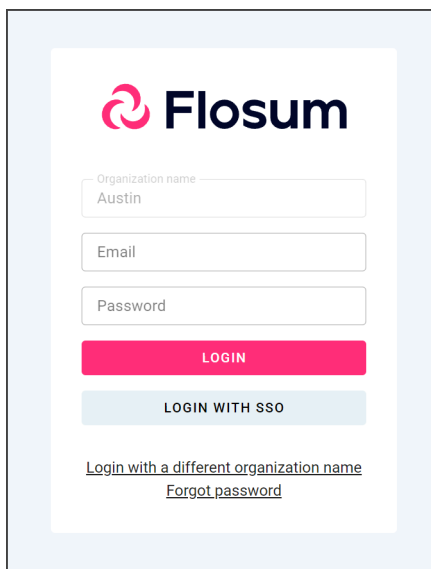
Add Single Sign-On (SSO)

The User Pool app supports integrating SSO providers using the OpenID Connect (OIDC) protocol, allowing users to authenticate using corporate credentials, providing a seamless and secure login experience. You can configure multiple identity providers if your organization uses separate providers for testing and production.

1. Click **Identity Providers** from the sidebar menu.
2. Click **Create** to add an SSO.



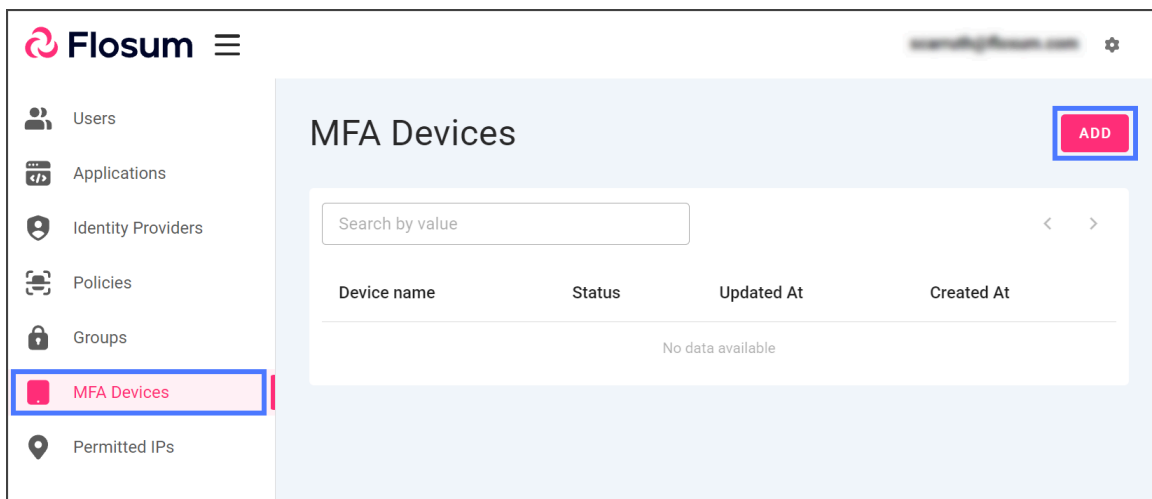
3. Refer to the [Flosum Knowledge Article - Configuring Identity Providers for SSO in the User Pool App](#) article for more detailed instructions to complete this.
4. After configuring SSO, the Flosum Backup & Archive Login Screen will display a **LOGIN WITH SSO** button at the bottom.



Add Multi-Factor Authentication (MFA)

MFA adds an extra layer of protection to your Flosum User Pool login. By requiring both a password and a time-based one-time passcode (TOTP), MFA significantly reduces the risk of unauthorized access and boosts your organization's overall security. Flosum Backup & Archive supports TOTP-based multi-factor authentication (MFA) using common mobile authenticator apps, such as Google Authenticator or Microsoft Authenticator.

1. Click **MFA Devices** from the sidebar menu.
2. Click **Add** to add an MFA device.



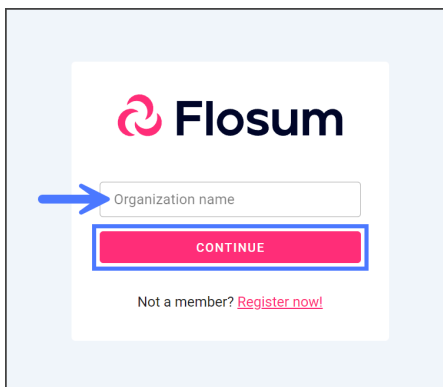
3. Refer to the [Flosum Knowledge Article - Setting up Multi-Factor Authentication in User Pool](#) article for more detailed instructions to complete this.

Log in to the Flosum Backup & Archive Application

Return to the Flosum Backup & Archive application via the URL previously used to create your tenant.

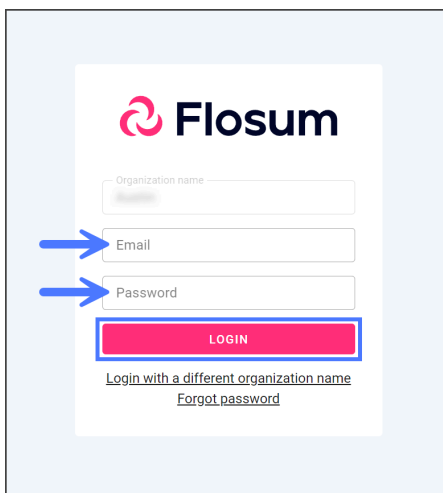
Region	Backup URL
US	backup-us-v3.flosum.app
Germany	backup-de.flosum.app
Japan	backup-jp.flosum.app

1. Provide the **Organization name** that you created earlier.
2. Click **Continue**.



The screenshot shows the Flosum login interface. At the top is the Flosum logo. Below it is a text input field labeled "Organization name". A blue arrow points to this field. Below the field is a red button with the text "CONTINUE" in white. Below the button is a link that says "Not a member? [Register now!](#)".

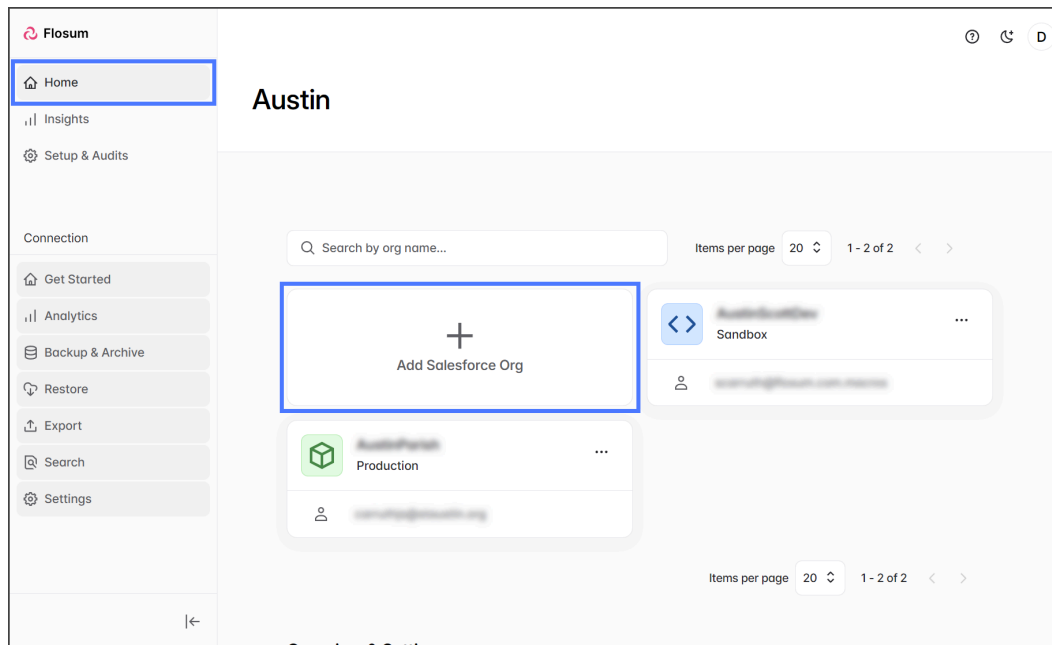
3. Provide the **Email** and **Password** you provided earlier.
4. Click the **LOGIN** Button.



The screenshot shows the Flosum login interface. At the top is the Flosum logo. Below it are two text input fields: "Organization name" (with a blurred value) and "Email". A blue arrow points to the "Email" field. Below the "Email" field is another text input field labeled "Password". A blue arrow points to this field. Below the "Password" field is a red button with the text "LOGIN" in white. Below the button are two links: "[Login with a different organization name](#)" and "[Forgot password](#)".

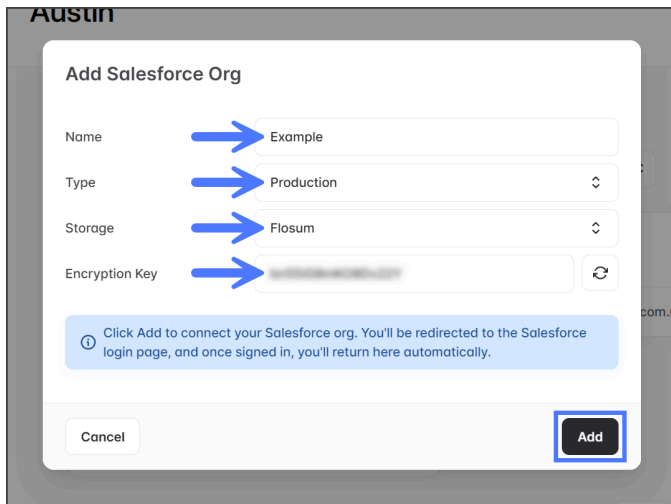
Connect Your Salesforce Org

1. In the **Flosum Backup & Archive** application, navigate to the **Home** page.
2. Click **Add Salesforce Org**.

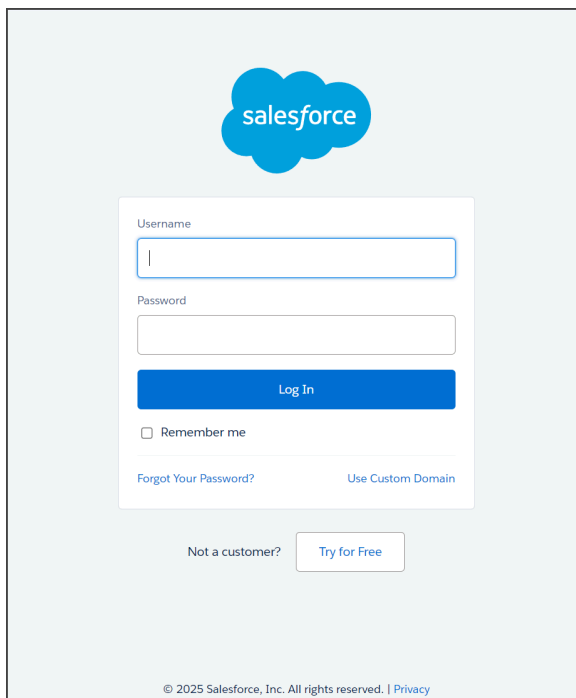


3. The **Add Salesforce Org** dialog will open.
4. Enter the **Name** of your Salesforce Organization that you will back up.
5. Select **Type** and choose either **Production** or **Sandbox**.
6. Select **Flosum** for Storage.
7. Enter the **Encryption Key** that you created earlier or use the one provided.

- Click the **Add** button.



- Authenticate via **Salesforce OAuth** (you'll be redirected to Salesforce).
- Log in to Salesforce using an Admin account for your Org.



- Grant access as requested.

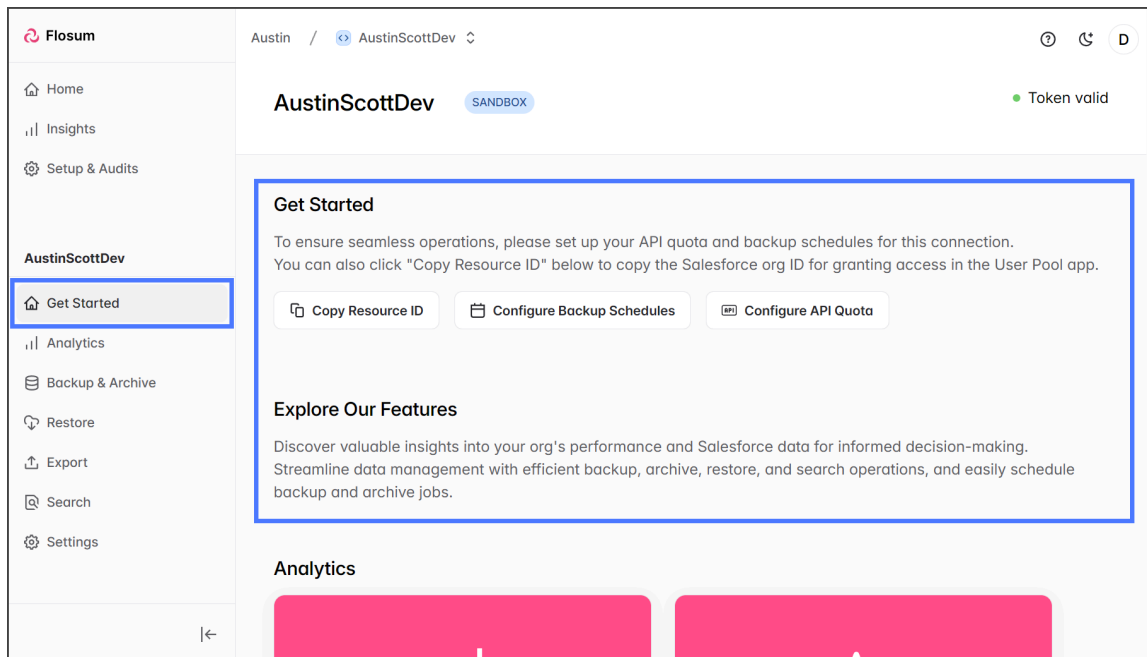
Initial Encryption Service Load

When first connecting, the **encryption service** will be set up, which may take some time as the system establishes an initial connection to your Salesforce organization. If your login user has **System Administrator permissions** in Salesforce, this process will complete automatically.

If the service continues to load indefinitely:

- Ensure the user has full permissions.
- Contact Flosum Support if the issue persists.

Once loaded successfully, you'll be directed to the **Get Started** page for the Salesforce org you connected.



Backup Operations

Flosum offers two methods for performing Composite Backups: a full **Composite Backup** and a **Templated Composite Backup**. The Composite Backup allows you to back up all your data in a single step. The Templated Composite Backup provides the flexibility to select specific objects, data, and files for inclusion. Both options can be executed immediately or scheduled for automatic runs at set intervals.

The Backup Operations section first explains System and User scheduled backups and how to edit and disable them. Next, it provides instructions for creating a Composite backup and a Templated backup.

System Scheduled

Each Salesforce org has two **system-scheduled** backup jobs: a **Default Composite Backup** and a **Default Composite & Sync Deleted Backup**. These jobs are managed by the system, and while they can't be deleted, you do have some control over when the jobs are scheduled to run. The section below explains how each default backup operates.

Default Composite Backup & Default Composite & Sync Deleted Backup

Flosum offers two backup methods: Composite Backup and Composite & Sync Backup. Each method plays a specific role in maintaining comprehensive, restorable snapshots of your org's data.

Default Composite Backup:

A Default Composite Backup is a lightweight process that tracks changes across your Salesforce org daily. After an initial full composite backup has been created, it saves any new, modified, or soft-deleted (Recycle Bin) records. By default, this system backup runs daily and can be used as an alternative to a user-defined composite backup.

- Tracks new and updated records.
- Flags records that are deleted and sent to the Recycle Bin.
- Optimized for daily execution.

Composite & Sync Backup:

A Default Composite & Sync Backup is a more intensive method that compares every record in your live Salesforce org to the ones stored in Flosum's backup repository. It detects even permanently deleted records, ensuring full fidelity. By default, this system backup runs monthly to detect purged records and ensure backup completeness. While a monthly backup schedule is recommended, you can change this backup to run on a weekly basis.

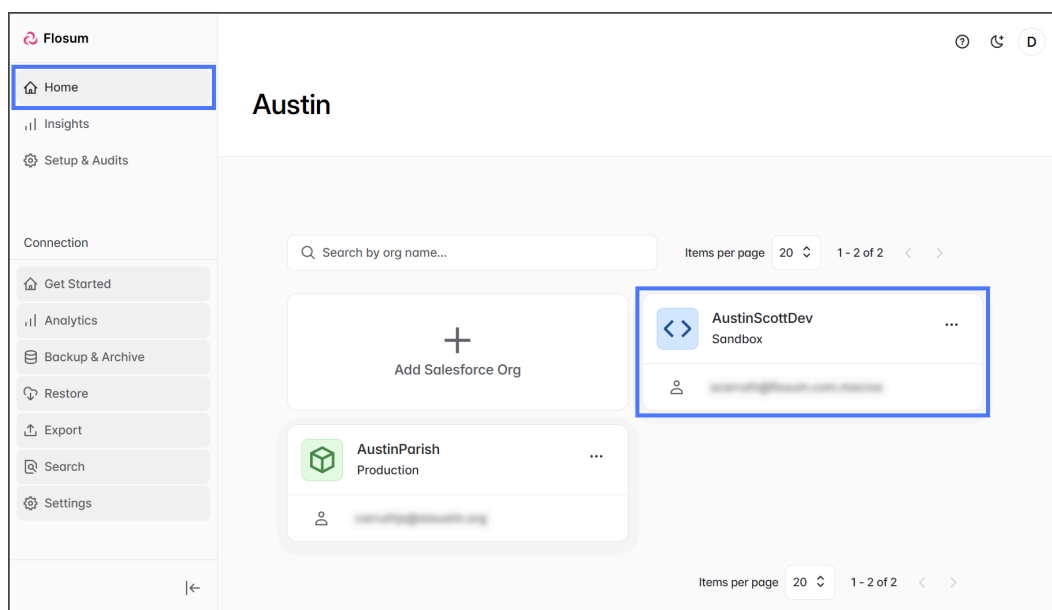
- Performs a full record comparison.
- Flags hard-deleted records that are no longer in Salesforce.
- Identifies discrepancies between the org and the backup.

Feature	Composite Backup	Composite & Sync Backup
Frequency	Daily	Monthly
Captures new/modified records	✓	✓
Captures soft-deleted (Recycle Bin) records	✓	✓
Captures hard-deleted records	✗	✓
Performs full record comparison	✗	✓
System performance impact	Low	High

Edit Default Backups

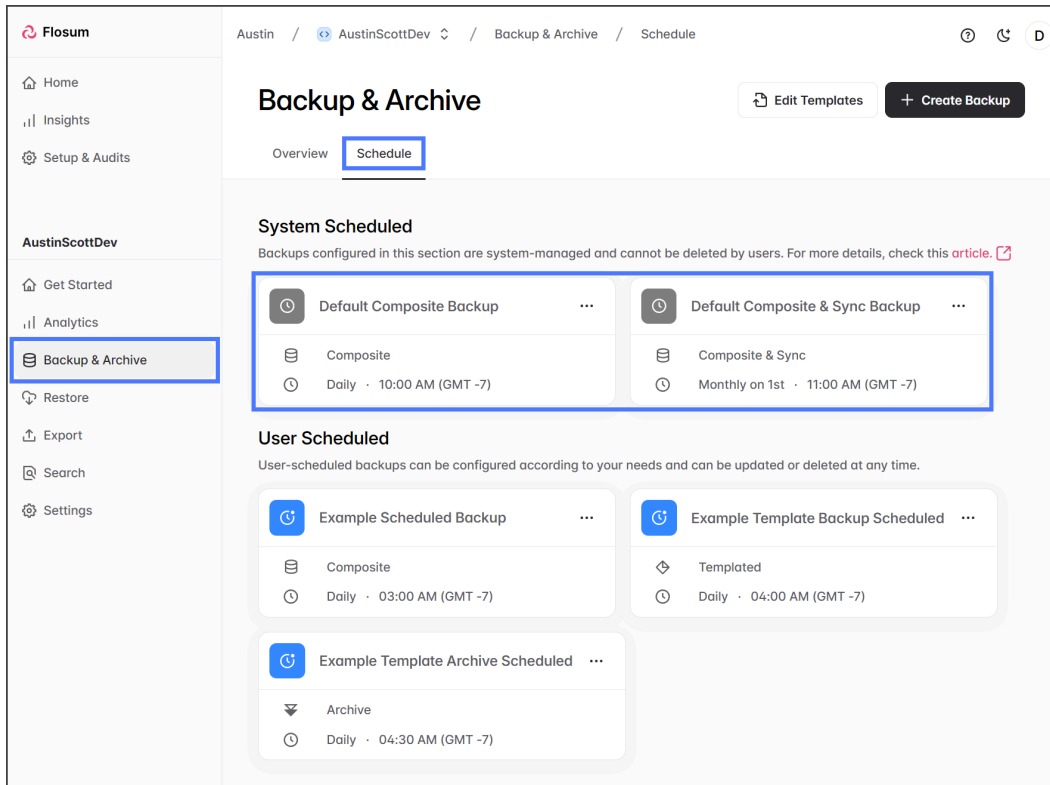
The schedules and job settings for the **Default Composite Backup** and **Default Composite & Sync Backup** can be changed.

1. From the **Home** page, select the **Org** to edit a default backup for.



2. Click **Backup & Archive** from the sidebar menu.
3. Click the **Schedule** tab.

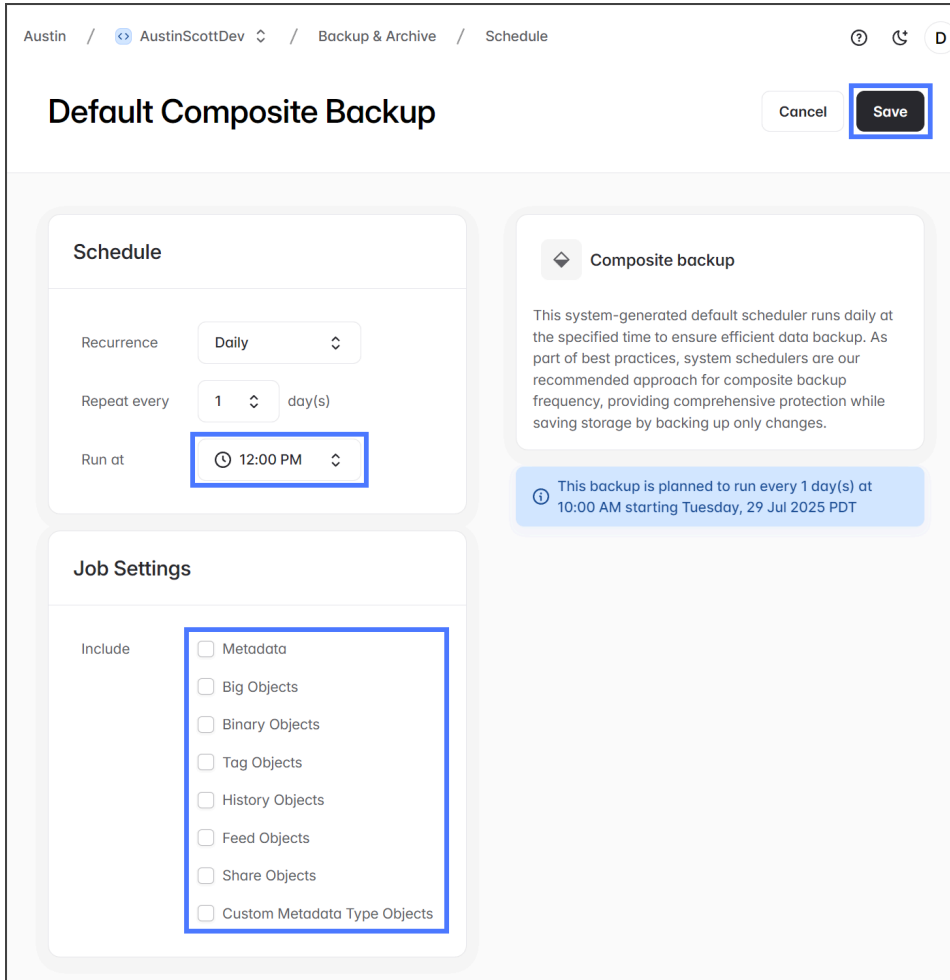
4. Click one of the **Default Backups**.



The screenshot shows the Flosum web interface. On the left is a sidebar with navigation links: Home, Insights, Setup & Audits, AustinScottDev (selected), Get Started, Analytics, Backup & Archive (highlighted with a blue box), Restore, Export, Search, and Settings. The main content area is titled 'Backup & Archive' and has two tabs: 'Overview' and 'Schedule' (highlighted with a blue box). In the top right of the main area are buttons for 'Edit Templates' and 'Create Backup'. The 'Schedule' tab is divided into two sections: 'System Scheduled' and 'User Scheduled'. The 'System Scheduled' section contains two backup cards: 'Default Composite Backup' (Daily at 10:00 AM GMT-7) and 'Default Composite & Sync Backup' (Monthly on 1st at 11:00 AM GMT-7). The 'User Scheduled' section contains three backup cards: 'Example Scheduled Backup' (Daily at 03:00 AM GMT-7), 'Example Template Backup Scheduled' (Daily at 04:00 AM GMT-7), and 'Example Template Archive Scheduled' (Daily at 04:30 AM GMT-7). Each card has a list of backup types (Composite, Composite & Sync, Templated, Archive) and a clock icon indicating the schedule.

Default Composite Backup:

- The schedule for the **Default Composite Backup** is set to run daily, and only the **Run at** time can be changed.
- The **Job Settings** section allows you to check any of the object checkboxes to include or exclude from the backup.
- After making changes to the backup job, click **Save**.



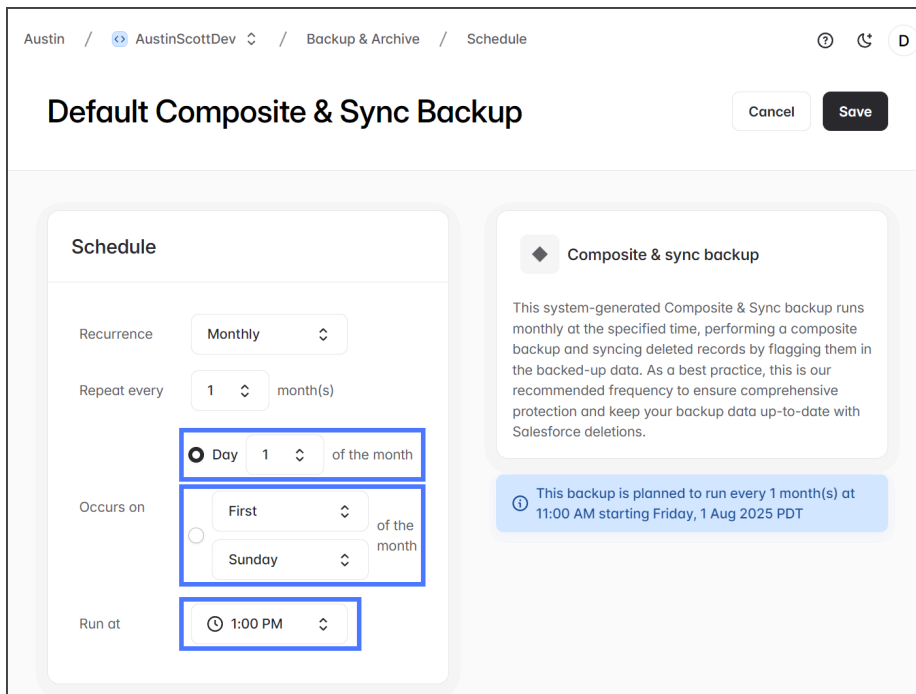
The screenshot shows the 'Default Composite Backup' configuration page. At the top, there is a breadcrumb trail: 'Austin / AustinScottDev / Backup & Archive / Schedule'. On the right, there are icons for help, refresh, and a user profile. Below the title, there are 'Cancel' and 'Save' buttons. The main content area is divided into three sections:

- Schedule:** Contains three settings: 'Recurrence' set to 'Daily', 'Repeat every' set to '1 day(s)', and 'Run at' set to '12:00 PM'.
- Composite backup:** A text box explaining that the system-generated default scheduler runs daily at the specified time to ensure efficient data backup. It also mentions that system schedulers are recommended for composite backup frequency.
- Job Settings:** A section titled 'Include' with a list of checkboxes for different object types: Metadata, Big Objects, Binary Objects, Tag Objects, History Objects, Feed Objects, Share Objects, and Custom Metadata Type Objects.

A blue information banner at the bottom right states: 'This backup is planned to run every 1 day(s) at 10:00 AM starting Tuesday, 29 Jul 2025 PDT'.

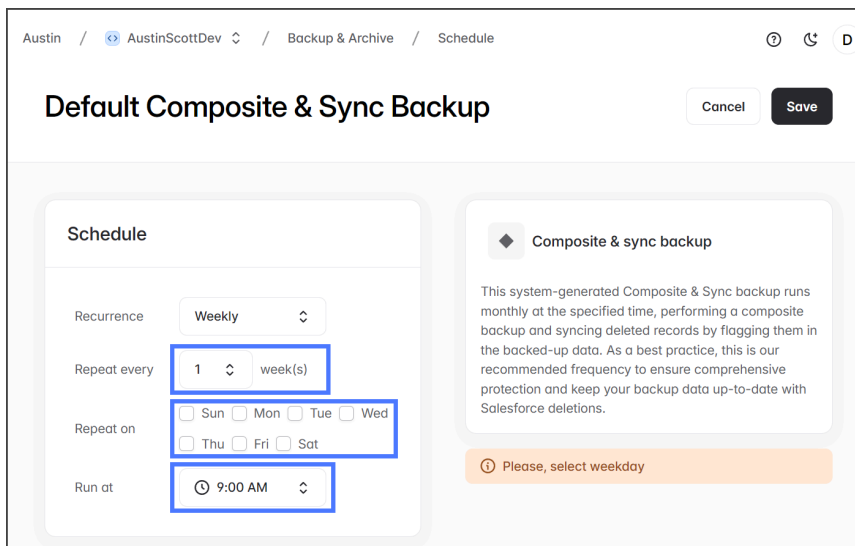
Default Composite & Sync Backup:

- The schedule for the **Default Composite & Sync Backup** can be set to recur **Monthly** or **Weekly**. Click the **Recurrence** selector to switch between monthly and weekly options.
- For **Monthly** schedules, you can choose to set a fixed day each month or select the first or last occurrence of a specific day of the week. You can also set the time of day the backup runs.




The screenshot shows the 'Default Composite & Sync Backup' configuration page. The 'Recurrence' is set to 'Monthly'. The 'Repeat every' is set to '1 month(s)'. The 'Occurs on' section is highlighted with a blue box, showing 'Day 1 of the month' selected. The 'Run at' time is set to '1:00 PM'. A blue information box states: 'This backup is planned to run every 1 month(s) at 11:00 AM starting Friday, 1 Aug 2025 PDT'.

- For **Weekly** schedules, you can select the number of weeks between runs (1-4) and the day of the week. You can also set the time of day when the backup runs.



The screenshot shows the 'Default Composite & Sync Backup' configuration page. The 'Recurrence' is set to 'Weekly'. The 'Repeat every' is set to '1 week(s)'. The 'Repeat on' section is highlighted with a blue box, showing 'Sun', 'Mon', 'Tue', 'Wed', 'Thu', 'Fri', and 'Sat' all selected. The 'Run at' time is set to '9:00 AM'. An orange warning box states: 'Please, select weekday'.

- The **Job Settings** section allows you to check any of the object checkboxes to include or exclude from the backup.
- After making changes to the backup job, click **Save**.

Austin /  AustinScottDev / Backup & Archive / Schedule

Default Composite & Sync Backup

Cancel
Save

Schedule

Recurrence
Monthly

Repeat every
1
month(s)

Day
1
of the month

Occurs on
First
of the month

Run at
1:00 PM

Job Settings

Include

☐ Metadata
☐ Big Objects
☐ Binary Objects
☐ Tag Objects
☐ History Objects
☐ Feed Objects
☐ Share Objects
☐ Custom Metadata Type Objects

Composite & sync backup

This system-generated Composite & Sync backup runs monthly at the specified time, performing a composite backup and syncing deleted records by flagging them in the backed-up data. As a best practice, this is our recommended frequency to ensure comprehensive protection and keep your backup data up-to-date with Salesforce deletions.

This backup is planned to run every 1 month(s) at 11:00 AM starting Friday, 1 Aug 2025 PDT

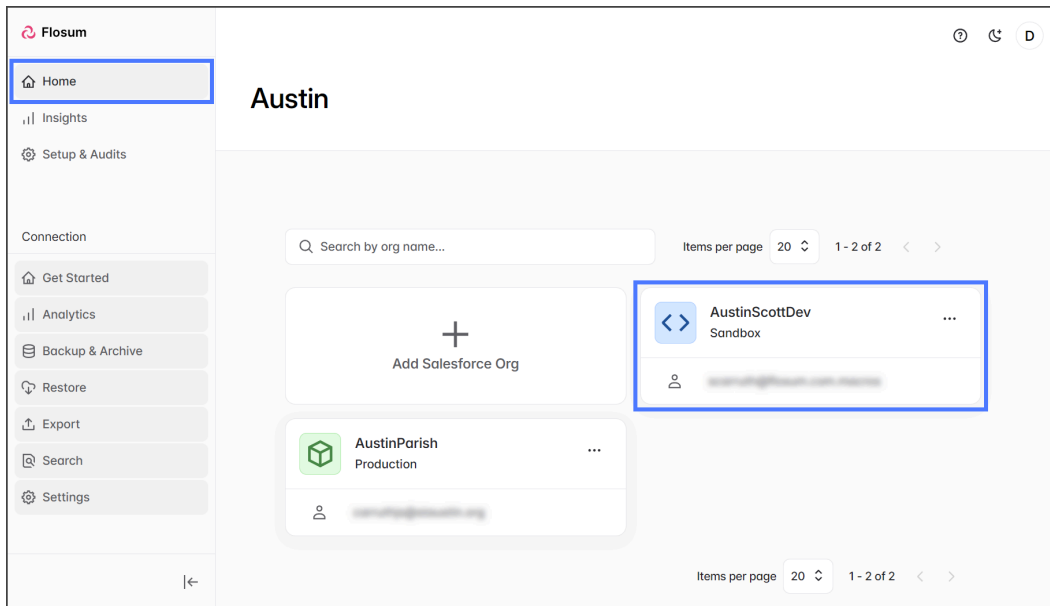
User Scheduled Backups

The schedules and job settings for User Scheduled backups can be modified, or the job can be completely deleted. The options for adjusting a backup job's settings and schedule are the same as when creating a new one. Refer to the following sections for instructions to better understand the available options.

- [Composite Backup](#)
- [Templated Backup](#)

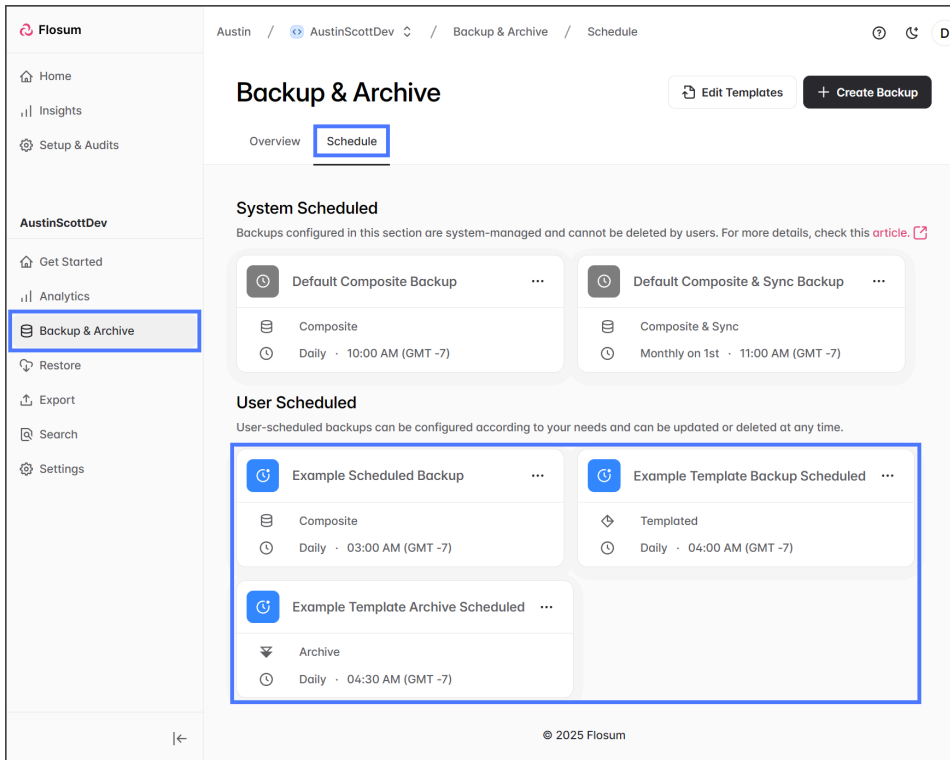
i For a templated backup, while you can edit the template, you cannot change which template the backup job is using.

1. From the **Home** page, select the **Org** to edit a backup for.



2. Click **Backup & Archive** from the sidebar menu.
3. Click the **Schedule** tab.

4. Click one of the **User Scheduled** backups.

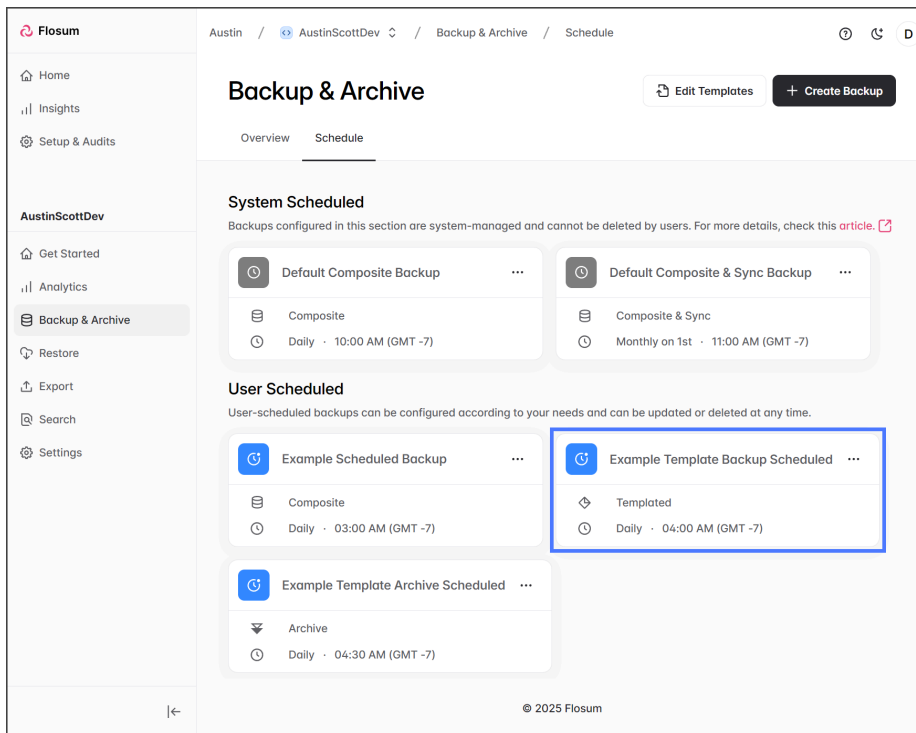


The screenshot shows the Flosum web interface. On the left is a sidebar with navigation links: Home, Insights, Setup & Audits, AustinScottDev (selected), Get Started, Analytics, Backup & Archive (highlighted with a blue box), Restore, Export, Search, and Settings. The main content area is titled 'Backup & Archive' and has two tabs: 'Overview' and 'Schedule' (highlighted with a blue box). Below the tabs, there are two sections: 'System Scheduled' and 'User Scheduled'. The 'System Scheduled' section shows two default backup configurations: 'Default Composite Backup' (Daily at 10:00 AM GMT -7) and 'Default Composite & Sync Backup' (Monthly on 1st at 11:00 AM GMT -7). The 'User Scheduled' section shows three example configurations: 'Example Scheduled Backup' (Daily at 03:00 AM GMT -7), 'Example Template Backup Scheduled' (Daily at 04:00 AM GMT -7), and 'Example Template Archive Scheduled' (Daily at 04:30 AM GMT -7). The 'Example Template Backup Scheduled' configuration is highlighted with a blue box. At the bottom of the interface, there is a copyright notice: '© 2025 Flosum'.

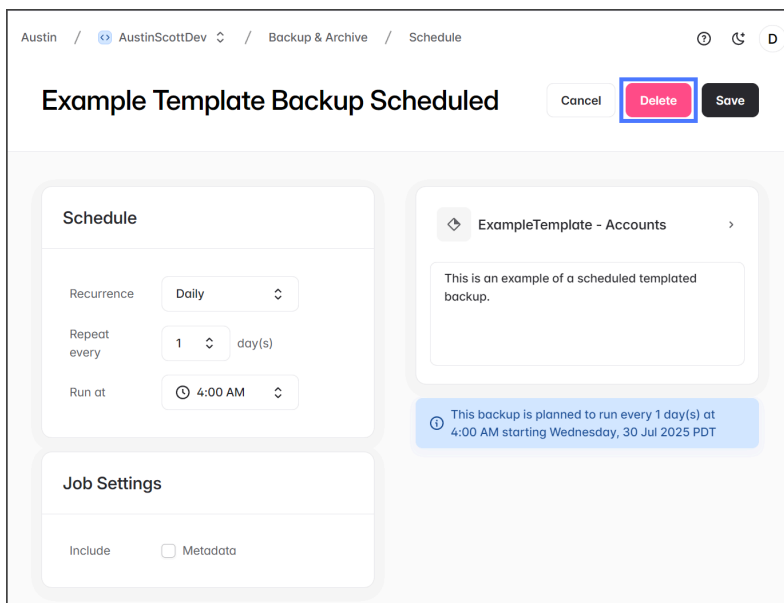
Delete User Scheduled Backup

A User-Scheduled backup can be deleted permanently and will no longer be run.

1. Click the **User Scheduled** backup to delete.



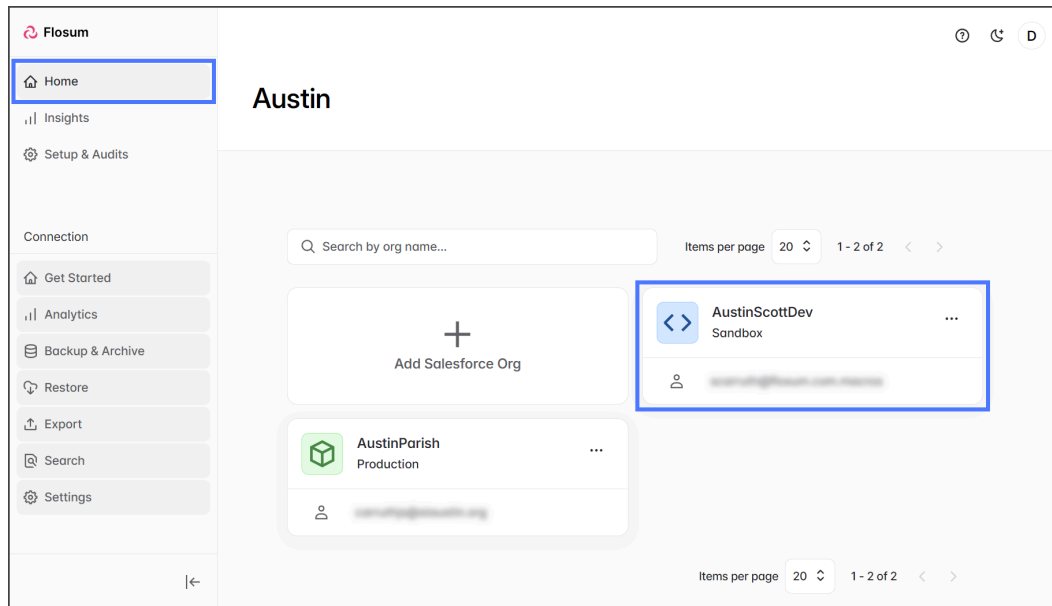
2. Click **Delete**. No confirmation dialog will be displayed.



Disable Scheduled Backups

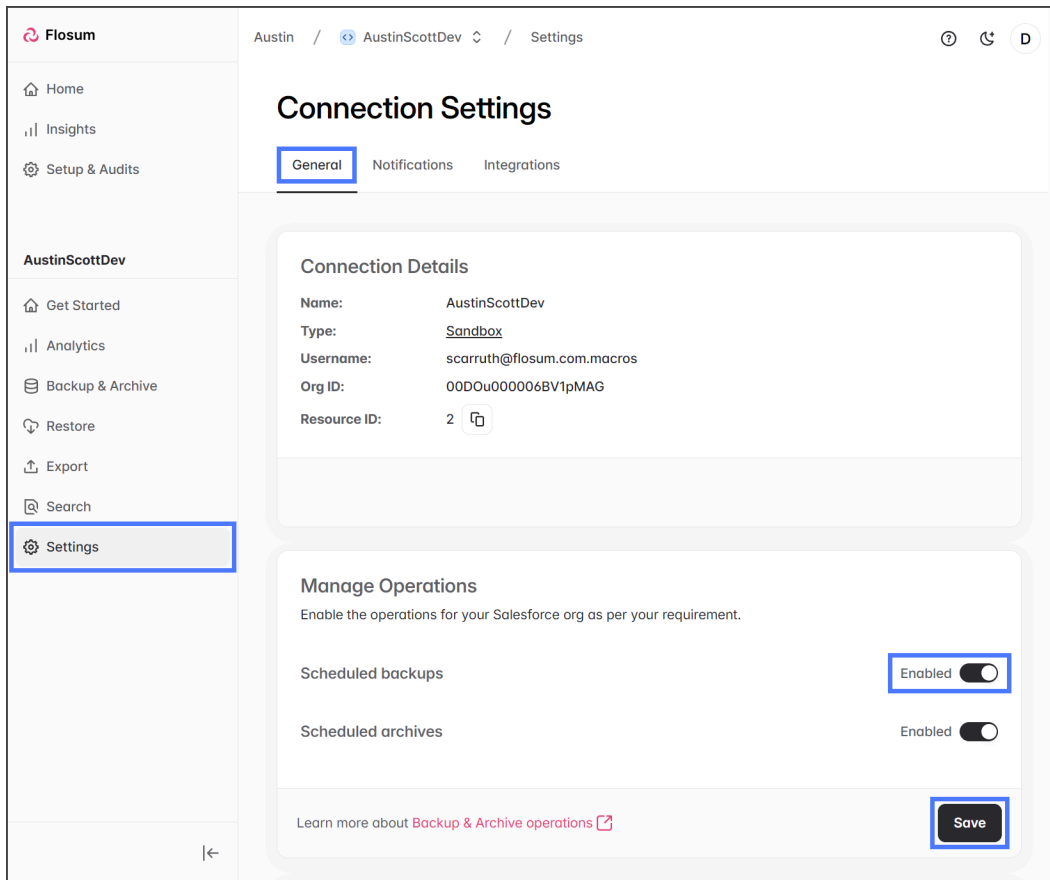
You can turn scheduled backups on or off for each organization. The default setting is **Enabled**. When scheduled backups are **disabled**, neither system nor user scheduled backups will run.

1. From the **Home** page, select the **Org** to edit a backup for.



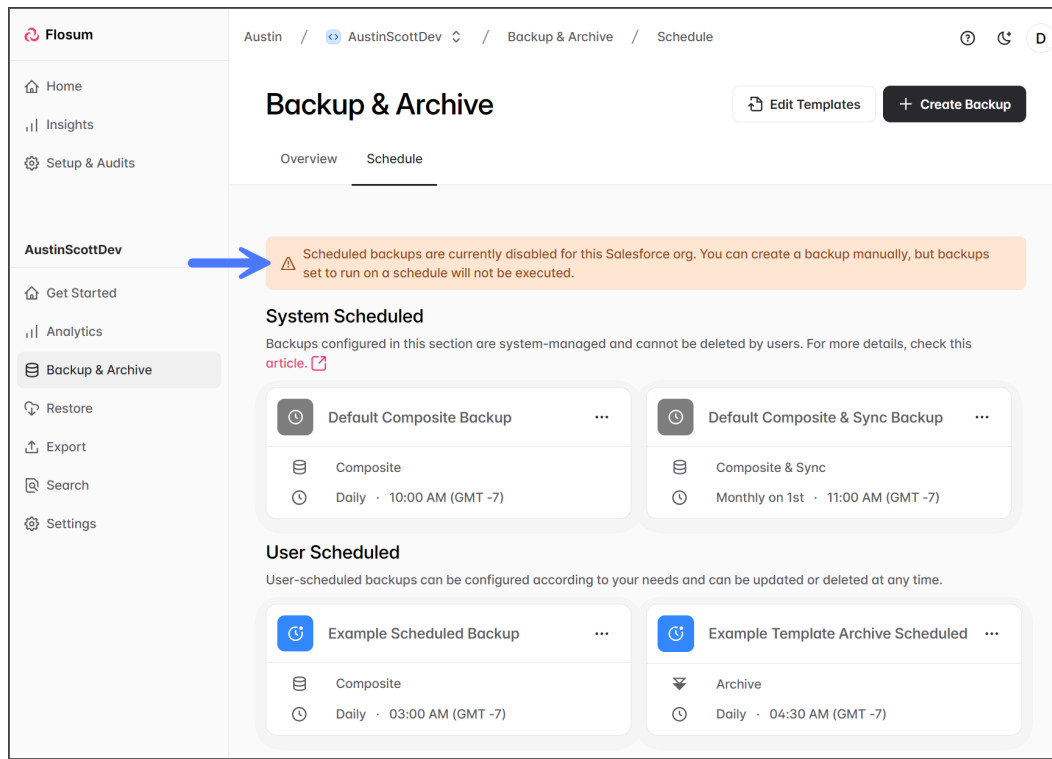
2. Click **Settings** from the sidebar menu.
3. On the **General** tab, scroll down to the **Manage Operations** section.

4. Click the **Scheduled backups** toggle to change from **Enabled** to **Disabled**. Both system and user scheduled backups will no longer run.



5. Click **Backup & Archive** from the sidebar menu.
6. Click the **Schedule** tab.

7. Confirm that the **Scheduled backups are currently disabled** warning is displayed.



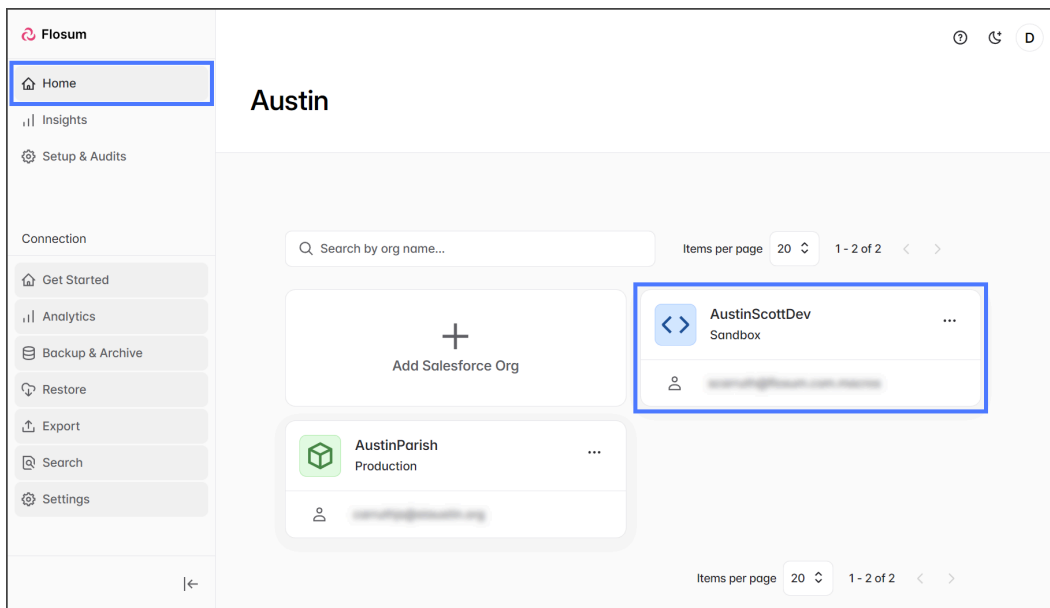
The screenshot shows the Flosum Backup & Archive interface. On the left is a sidebar with navigation links: Home, Insights, Setup & Audits, AustinScottDev (selected), Get Started, Analytics, Backup & Archive, Restore, Export, Search, and Settings. The main content area is titled "Backup & Archive" and has tabs for "Overview" and "Schedule". A blue arrow points to an orange warning banner that reads: "Scheduled backups are currently disabled for this Salesforce org. You can create a backup manually, but backups set to run on a schedule will not be executed." Below the banner, there are two sections: "System Scheduled" and "User Scheduled". The "System Scheduled" section lists two backup configurations: "Default Composite Backup" (Daily, 10:00 AM (GMT -7)) and "Default Composite & Sync Backup" (Monthly on 1st, 11:00 AM (GMT -7)). The "User Scheduled" section lists two backup configurations: "Example Scheduled Backup" (Daily, 03:00 AM (GMT -7)) and "Example Template Archive Scheduled" (Daily, 04:30 AM (GMT -7)).

Composite Backup

A Composite Backup backs up all objects, data, and files as selected in the Job Settings. The first time you run a Composite Backup, it takes a complete backup of your Salesforce organization. Subsequent backup jobs will then only backup the data and files that have changed. You can choose to run a backup immediately or schedule it to occur at a set interval.

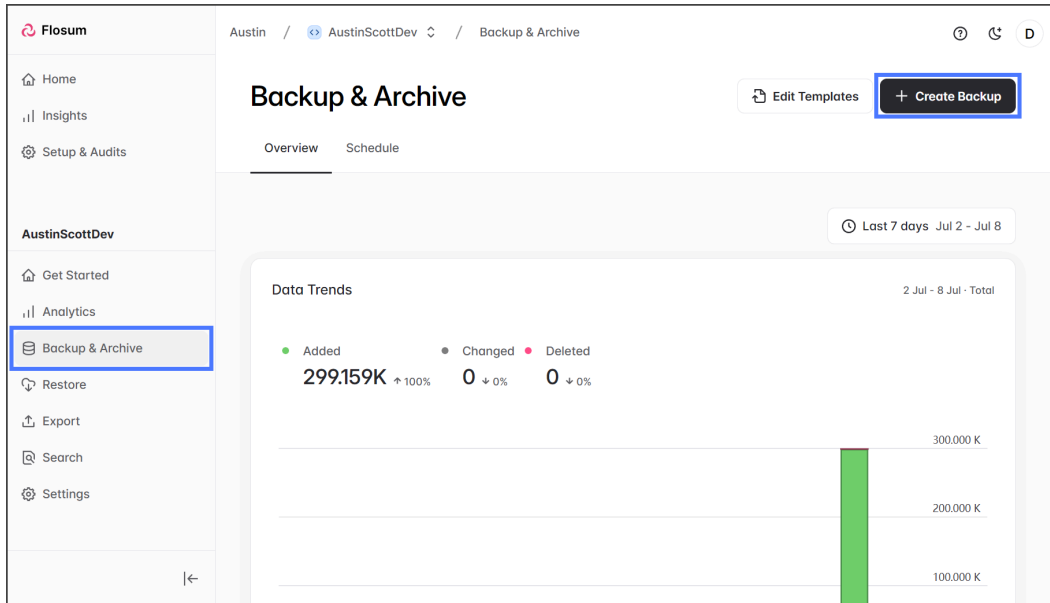
Create a Composite Backup

1. From the **Home** page, select the **Org** to backup.

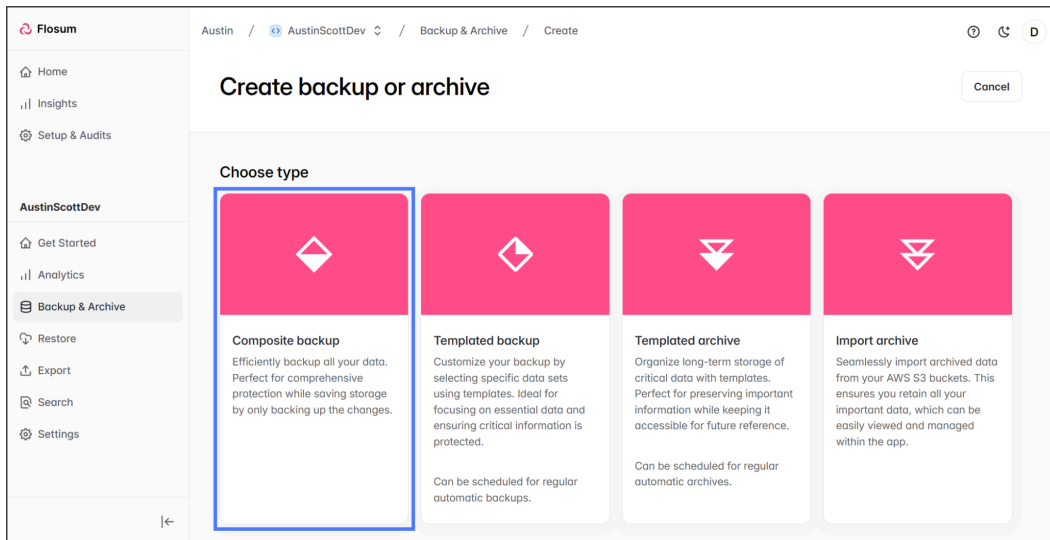


2. Click **Backup & Archive** from the sidebar menu.

3. Click **Create Backup**.



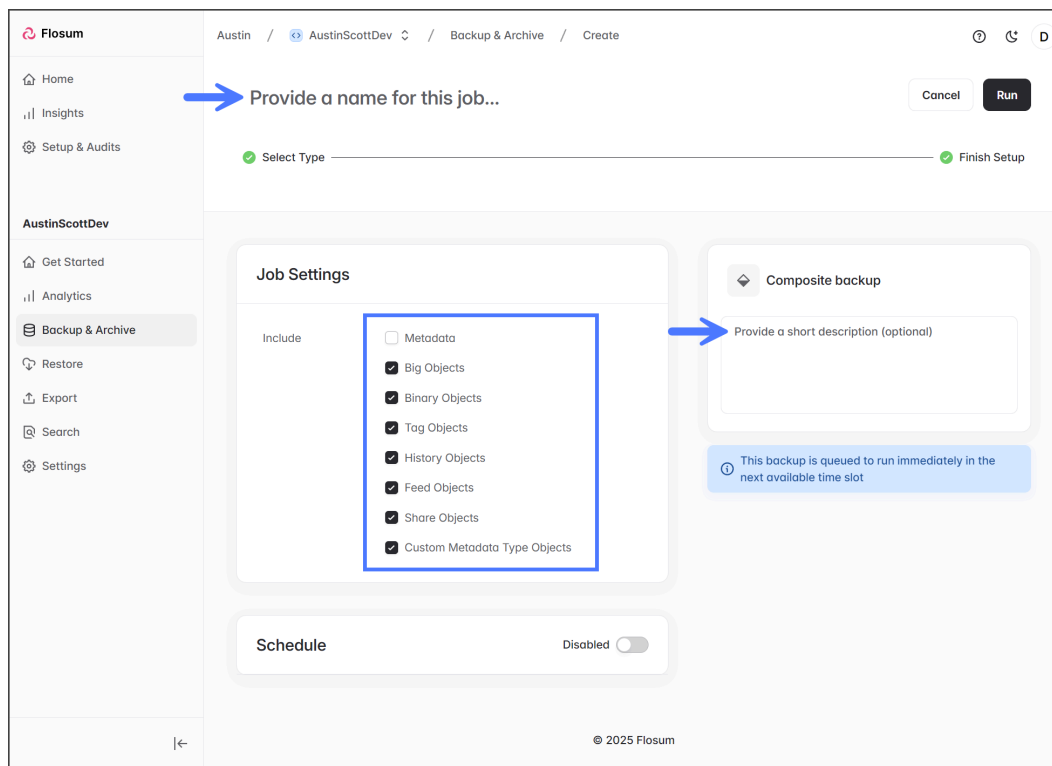
4. Click **Composite Backup**.



5. Enter a name for the backup job.

6. Select the **Job Settings** checkboxes for the objects to back up. You can leave the default options or choose a custom selection, including Metadata for the backup job.

7. (Optional) Enter a description of the backup in the **Composite Backup** textbox.



Provide a name for this job...

Cancel Run

Select Type Finish Setup

Job Settings

Include

- ☐ Metadata
- ☒ Big Objects
- ☒ Binary Objects
- ☒ Tag Objects
- ☒ History Objects
- ☒ Feed Objects
- ☒ Share Objects
- ☒ Custom Metadata Type Objects

Schedule Disabled

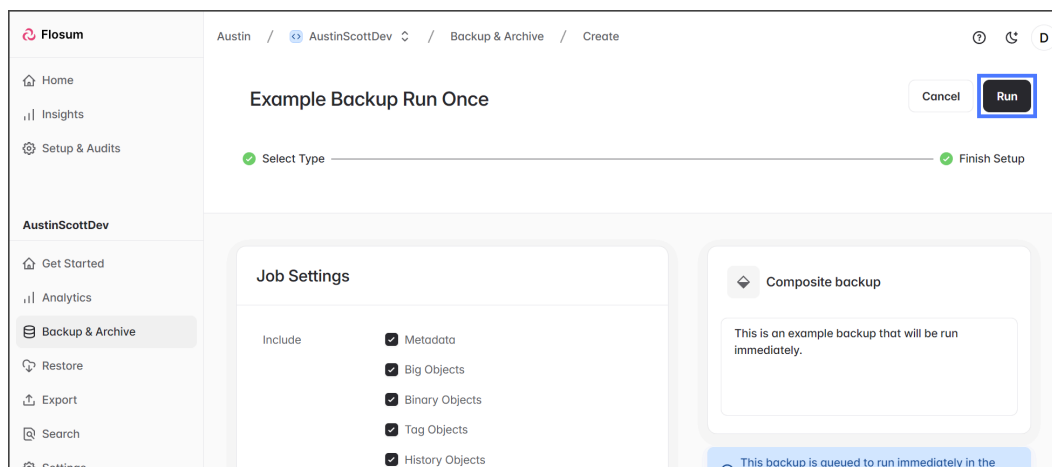
Composite backup

Provide a short description (optional)

This backup is queued to run immediately in the next available time slot

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8. Click the **Run** button to start the Composite Backup.



Example Backup Run Once

Cancel Run

Select Type Finish Setup

Job Settings

Include

- ☒ Metadata
- ☒ Big Objects
- ☒ Binary Objects
- ☒ Tag Objects
- ☒ History Objects

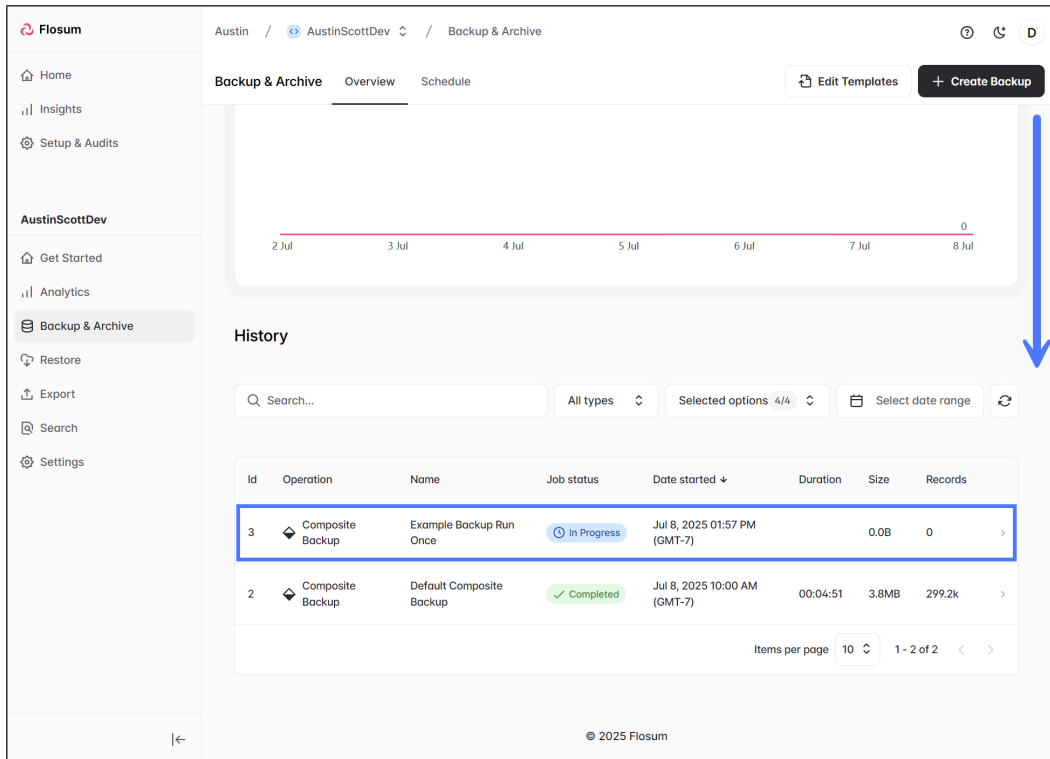
Composite backup

This is an example backup that will be run immediately.

This backup is queued to run immediately in the

9. The Composite Backup job immediately.

10. Scroll down to the **History** table to view the status of the Composite Backup Job.



The screenshot shows the Flosum Backup & Archive interface. The left sidebar contains navigation links: Home, Insights, Setup & Audits, AustinScottDev, Get Started, Analytics, Backup & Archive (selected), Restore, Export, Search, and Settings. The main content area has tabs for Backup & Archive, Overview, and Schedule. A 'Create Backup' button is visible. Below the tabs is a calendar view for July. The 'History' section contains a search bar, filters, and a table of backup jobs.

Id	Operation	Name	Job status	Date started	Duration	Size	Records
3	Composite Backup	Example Backup Run Once	In Progress	Jul 8, 2025 01:57 PM (GMT-7)		0.0B	0
2	Composite Backup	Default Composite Backup	Completed	Jul 8, 2025 10:00 AM (GMT-7)	00:04:51	3.8MB	299.2k

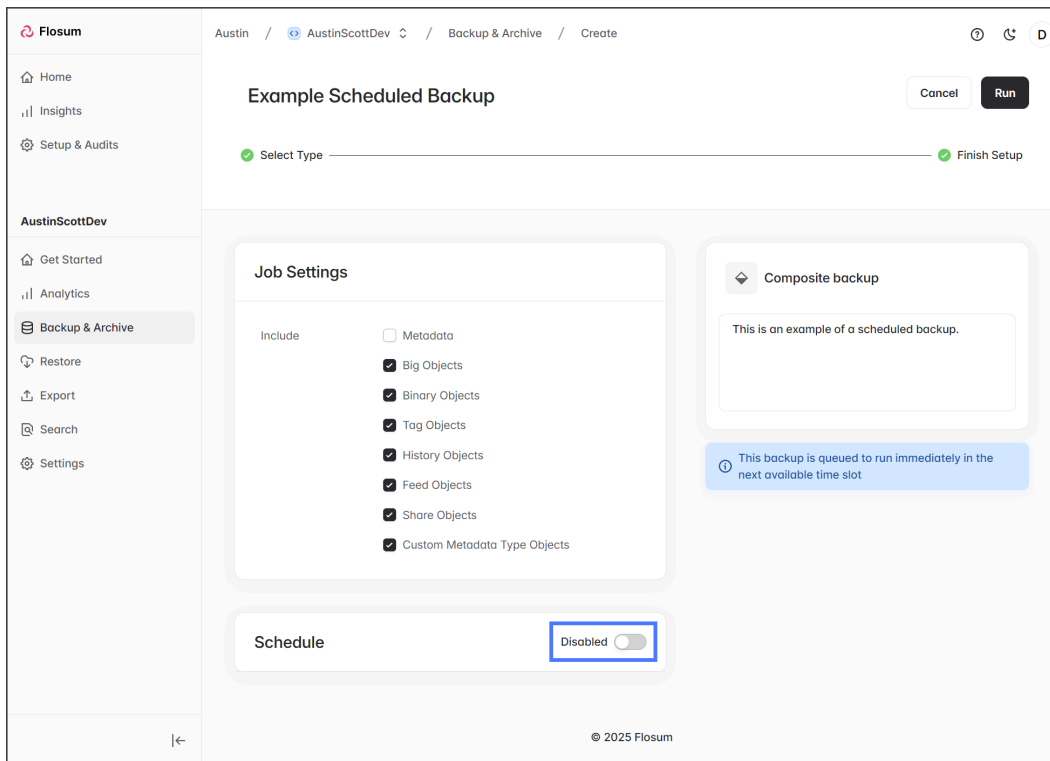
Items per page: 10 | 1 - 2 of 2

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Schedule a Composite Backup

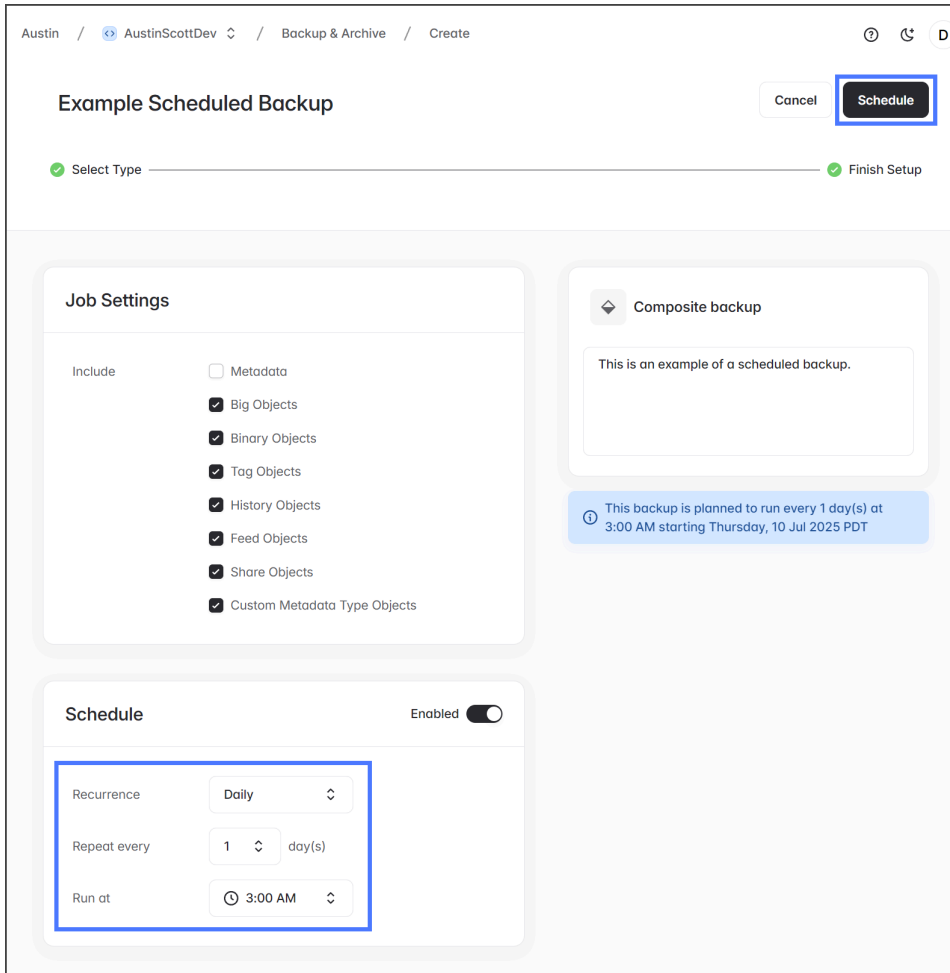
Alternatively, you can schedule your Composite Backup to run at a specific date and time interval. The process is similar to creating an immediate backup.

1. Complete the steps outlined in the [Create a Composite Backup](#) section above. Before clicking **Run**, enable the schedule option.
2. Switch the **Schedule** toggle to **Enabled**.



3. Select the **Recurrence** of the backup to run **Daily**, **Weekly**, or **Monthly**.
4. Configure the **Schedule** options. Daily, Weekly, and Monthly each have different options to set the time and date the backup is run.

5. Click the **Schedule** button to schedule your backup job.



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Example Scheduled Backup

Cancel **Schedule**

✔ Select Type ————— ✔ Finish Setup

Job Settings

Include

- ☐ Metadata
- ☒ Big Objects
- ☒ Binary Objects
- ☒ Tag Objects
- ☒ History Objects
- ☒ Feed Objects
- ☒ Share Objects
- ☒ Custom Metadata Type Objects

Composite backup

This is an example of a scheduled backup.

ⓘ This backup is planned to run every 1 day(s) at 3:00 AM starting Thursday, 10 Jul 2025 PDT

Schedule

Enabled ☒

Recurrence: Daily

Repeat every: 1 day(s)

Run at: 3:00 AM

6. Confirm the schedule is correct and click **Save**.

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Austin / AustinScottDev / Backup & Archive / Schedule

Home
Insights
Setup & Audits
AustinScottDev
Get Started
Analytics
Backup & Archive
Restore
Export
Search
Settings

Example Scheduled Backup

Cancel
Delete
Save

Schedule

Recurrence: Daily
Repeat every: 1 day(s)
Run at: 3:00 AM

Job Settings

Include:
☐ Metadata
☒ Big Objects
☒ Binary Objects
☒ Tag Objects
☒ History Objects
☒ Feed Objects
☒ Share Objects
☒ Custom Metadata Type Objects

Composite backup

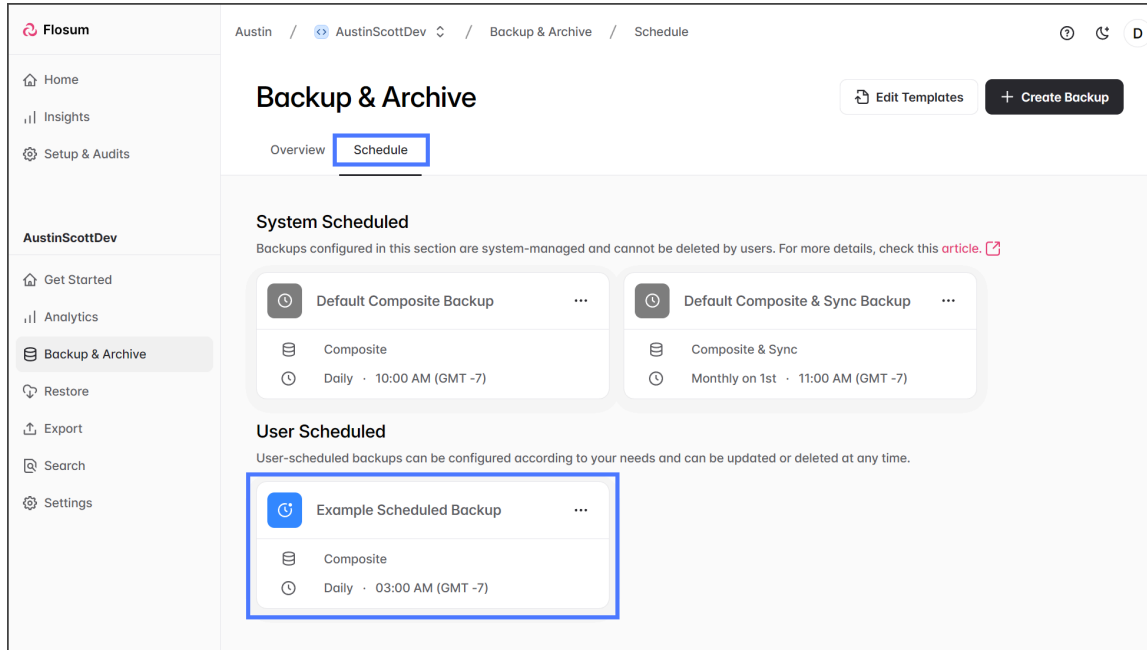
This system-generated default scheduler runs daily at the specified time to ensure efficient data backup. As part of best practices, system schedulers are our recommended approach for composite backup frequency, providing comprehensive protection while saving storage by backing up only changes.

This backup is planned to run every 1 day(s) at 3:00 AM starting Thursday, 10 Jul 2025 PDT

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View Scheduled Backups

All scheduled backups for the selected Org will appear on the **Schedule** tab of the **Backup & Archive** section. Any scheduled backups you have created will be found in the **User Scheduled** section.



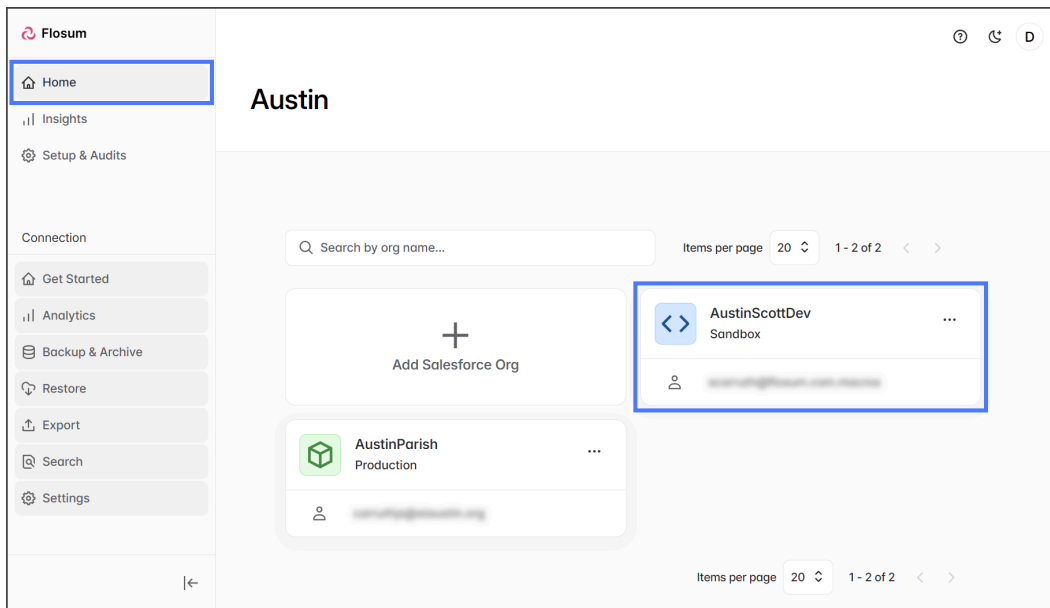
The screenshot shows the Flosum interface for the 'Backup & Archive' section, specifically the 'Schedule' tab. The left sidebar contains navigation links: Home, Insights, Setup & Audits, AustinScottDev (selected), Get Started, Analytics, Backup & Archive (highlighted), Restore, Export, Search, and Settings. The main content area is titled 'Backup & Archive' and has two tabs: 'Overview' and 'Schedule' (which is selected and highlighted with a blue box). Below the tabs, there are two sections: 'System Scheduled' and 'User Scheduled'. The 'System Scheduled' section contains two backup configurations: 'Default Composite Backup' (Daily at 10:00 AM GMT -7) and 'Default Composite & Sync Backup' (Monthly on 1st at 11:00 AM GMT -7). The 'User Scheduled' section contains one backup configuration: 'Example Scheduled Backup' (Daily at 03:00 AM GMT -7), which is highlighted with a blue box. The top right of the interface shows the user 'Austin' and the organization 'AustinScottDev', along with a 'Create Backup' button.

Templated Backup

A Templated Backup allows you to be more granular with what objects, data, and files are backed up. The first time you run a Templated Backup, it takes a complete backup of the selected data of your Salesforce organization. Subsequent backup jobs will then only backup the data that has changed. You can choose to run a backup immediately or schedule it to occur at a set interval.

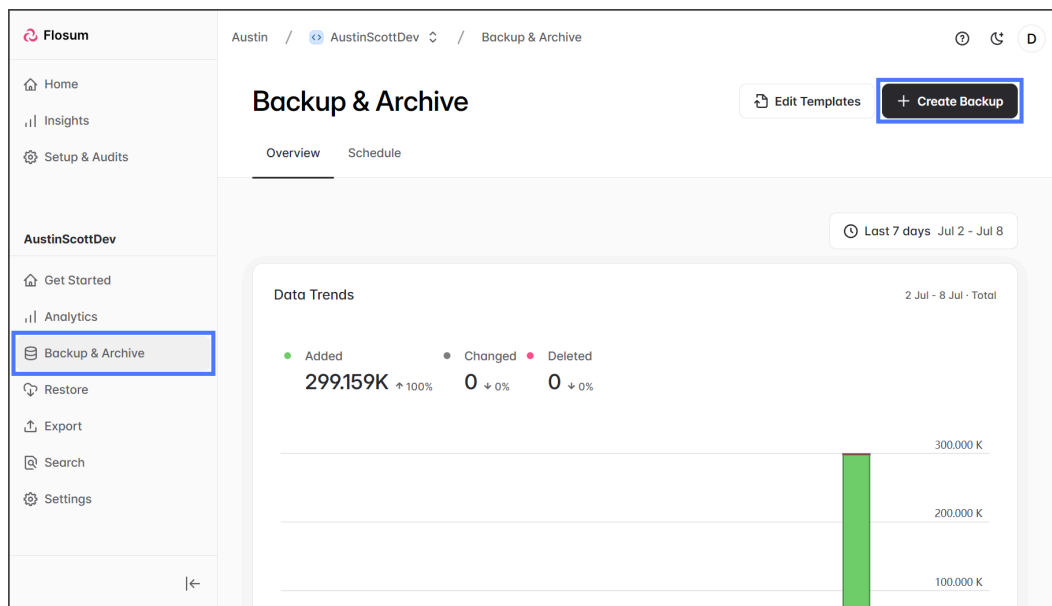
Create a Templated Backup

1. From the **Home** page, select the **Org** to backup.

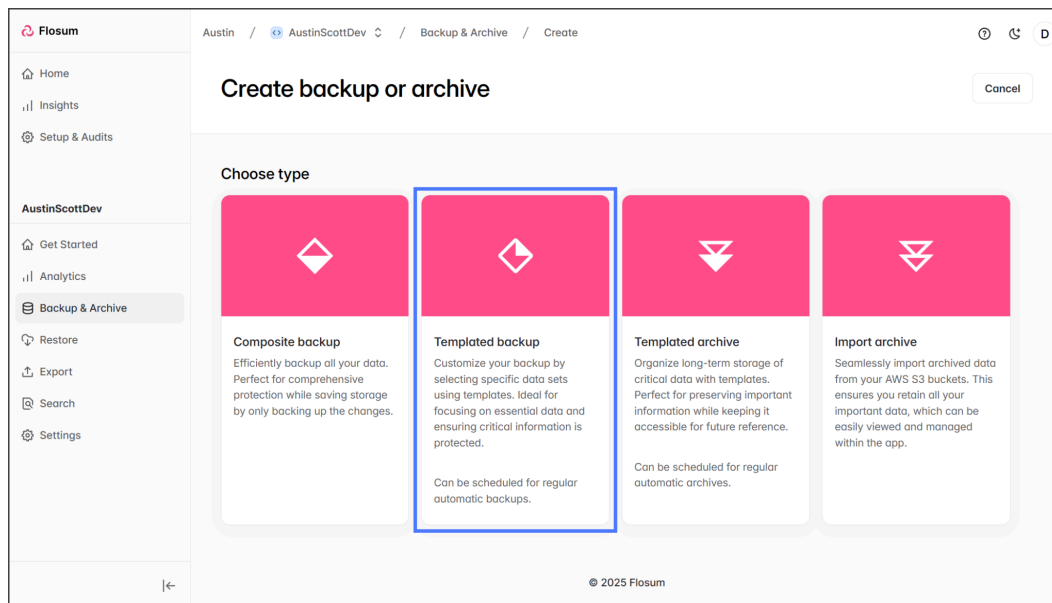


2. Click **Backup & Archive** from the sidebar menu.

3. Click **Create Backup**.



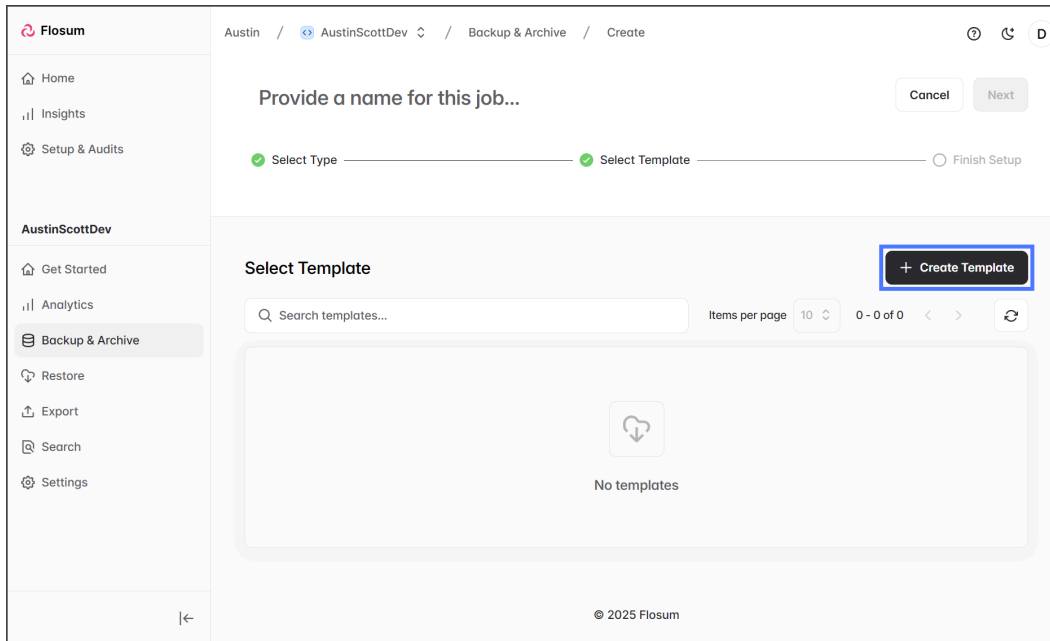
4. Click **Templated Backup**.



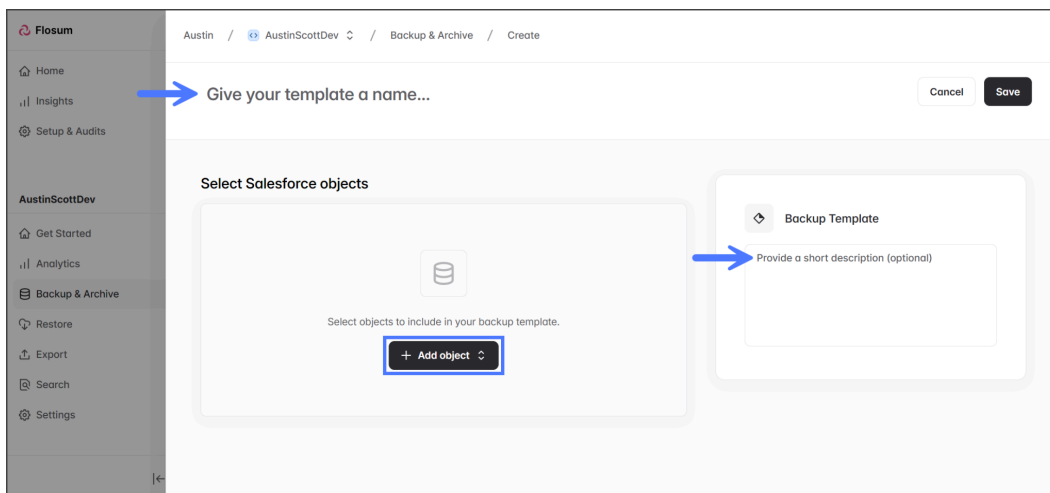
Create a Template

If there are no templates or you need to create a new one, follow the instructions below. Skip to [Finish Creating Templated Backup](#) if you don't need to create a template.

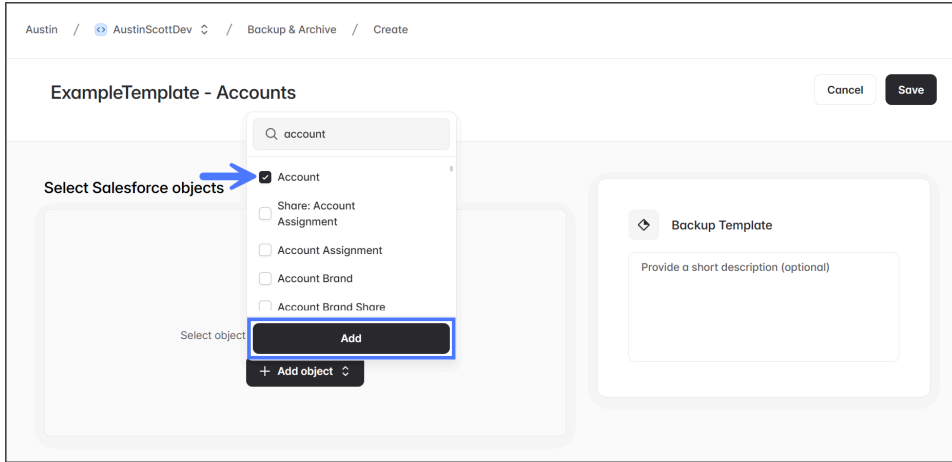
1. Click **Create Template** if there are no templates or if you need to create a new one.



2. Enter a **Name** for the template.
3. Enter a helpful **Description** of the template's purpose in the optional **Backup Template** textbox.
4. Click the **Add object** menu button to select the Salesforce Objects to include in the template.

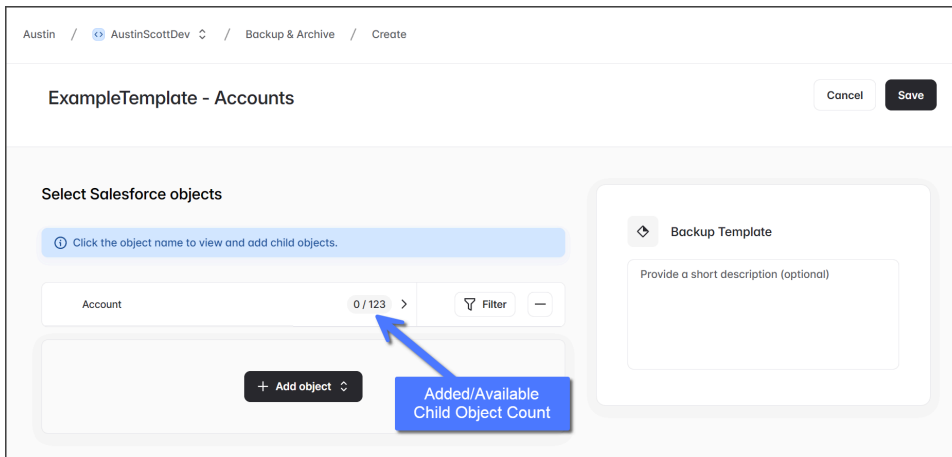


5. Search or browse for objects from the menu.
6. Check the objects you want to add.
7. Click **Add** to add all of the selected objects.



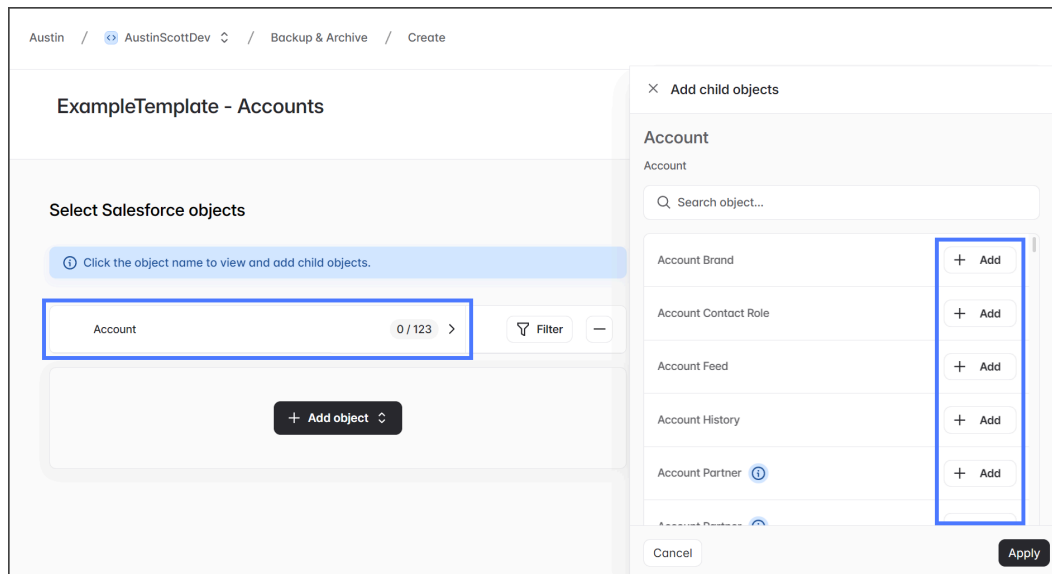
8. Once an object is added, you can add one or more child objects.

i To the right of the object's name is a count of **Add/Available** child objects. In this example, the **Account** object has **123** child objects, and **0** of them have been added.

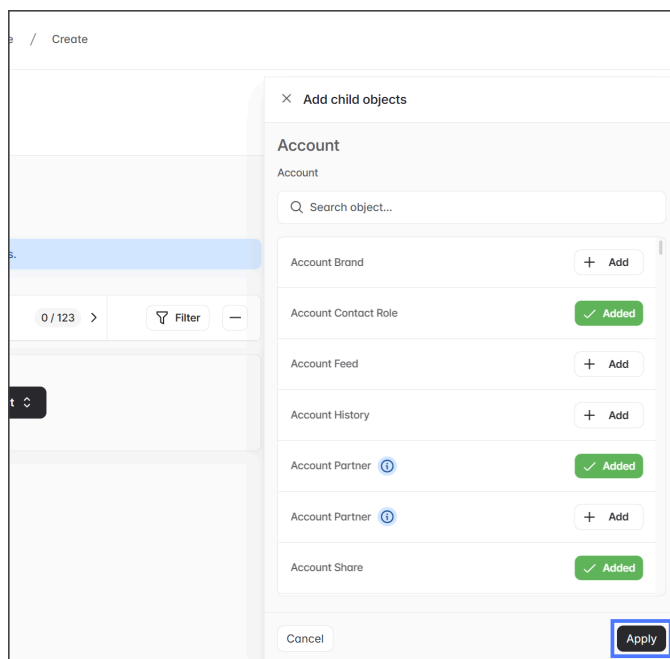


9. Click an object to open the **Add child objects** dialog.

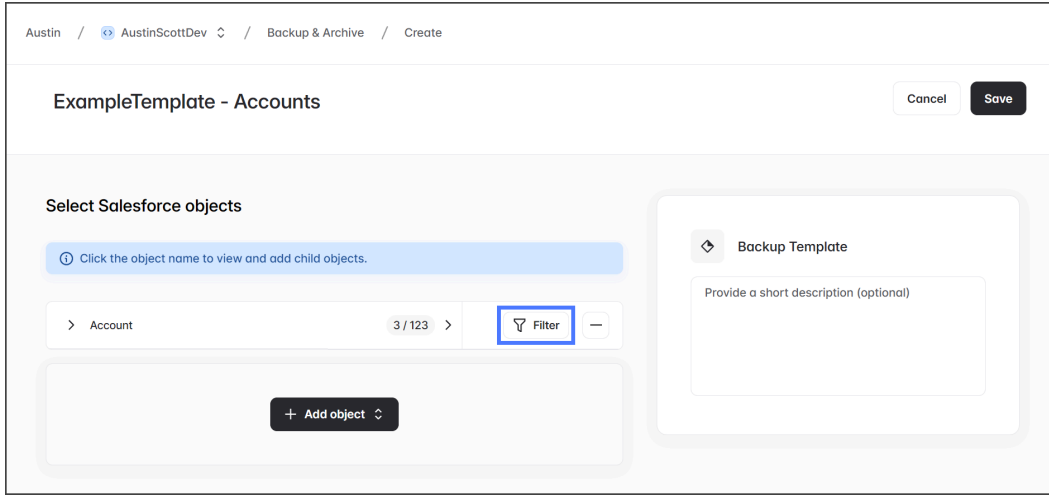
10. Click the **+ Add** button next to each of the child objects to add.



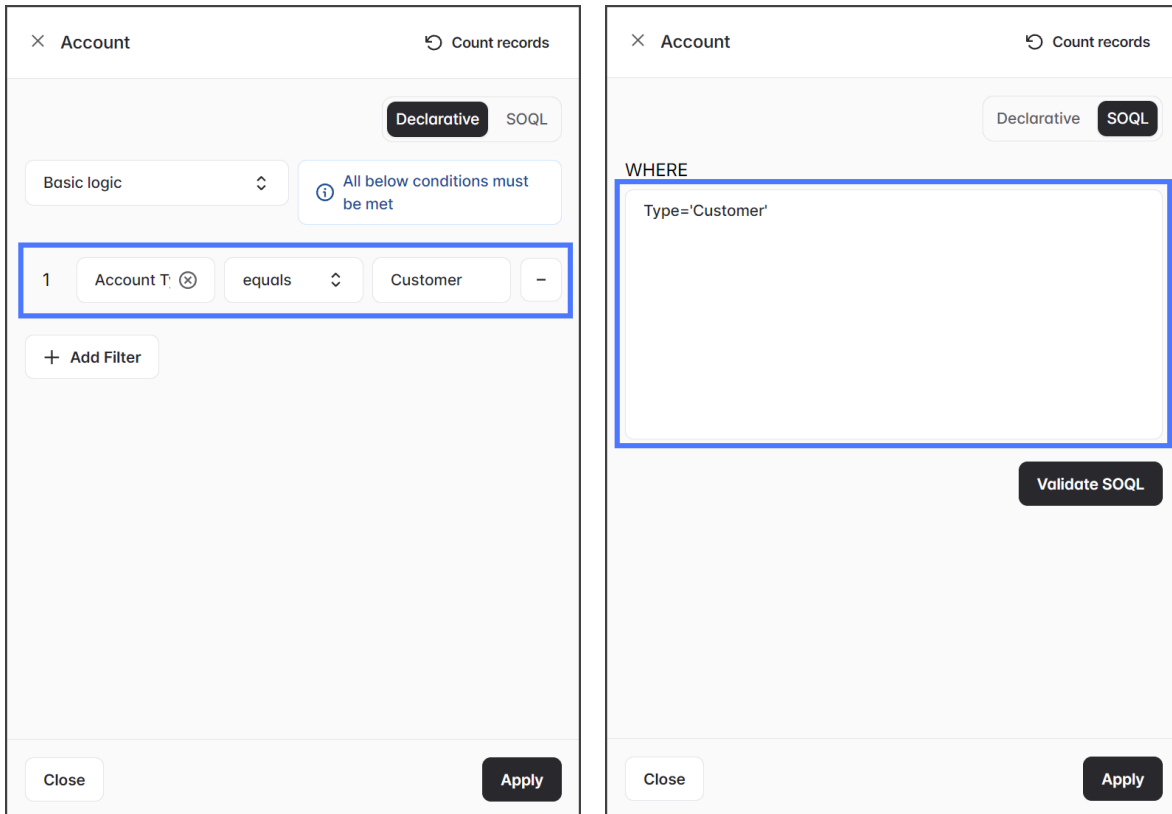
11. Once you have added all the objects, click **Apply** to save the changes.



12. (Optional) Click **Filter** to add a filter to the object.

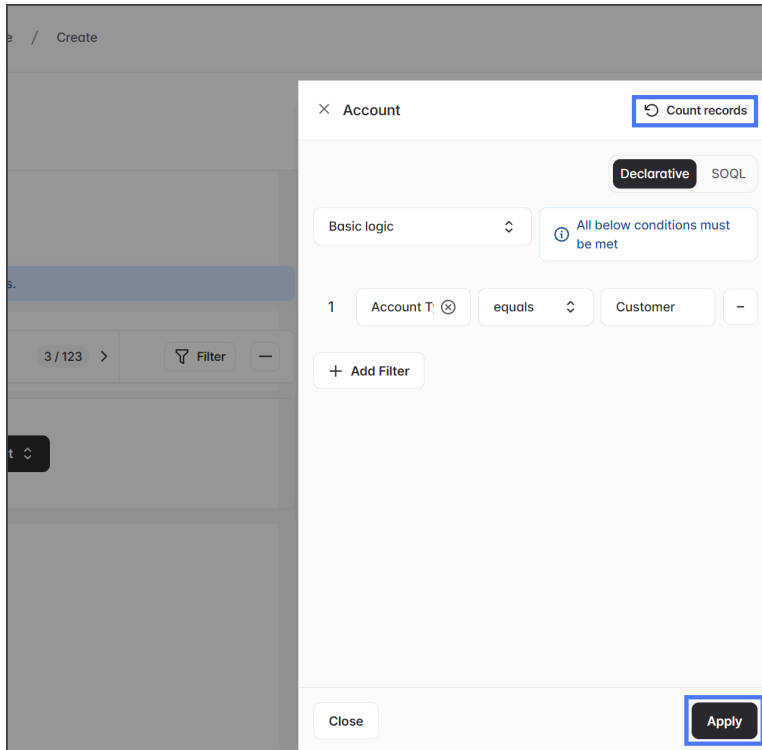


13. You can choose to filter using **Declarative** criteria, similar to Salesforce reporting, or through an **SOQL** query. An example of the same filter created each way is shown in the screenshots below.

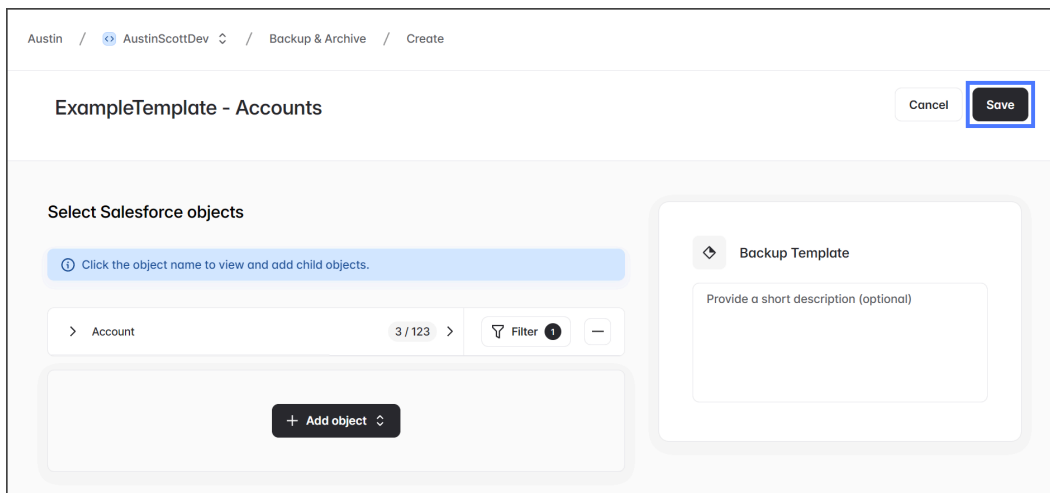


14. (Optional) Click the **Count records** button to verify that the filter is retrieving the correct number of records.

15. Click **Apply** to save the filter.




16. Click **Save** once you have configured all of the objects for this template.

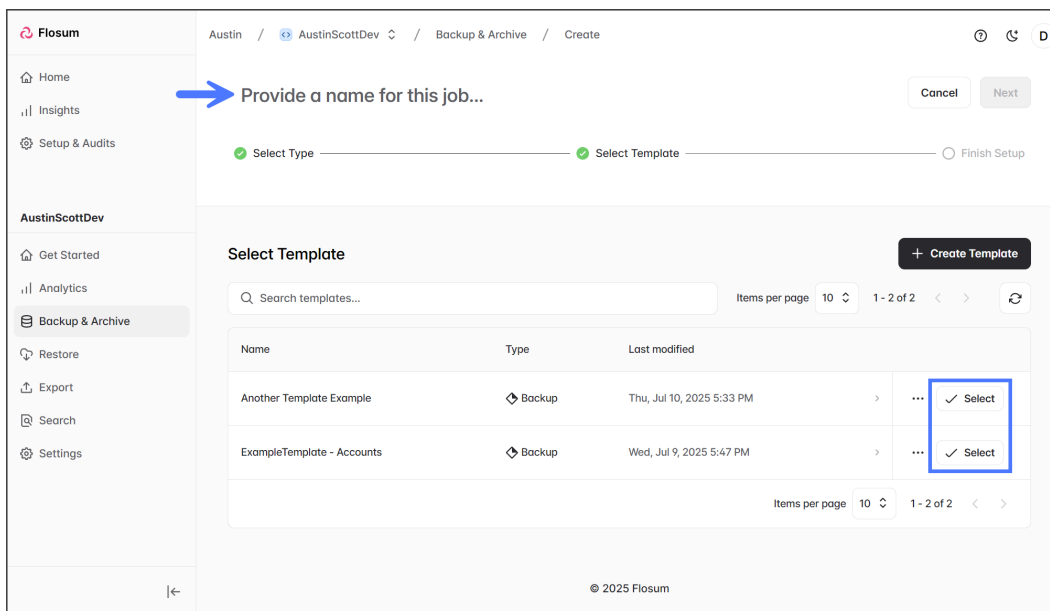


Finish Creating Templated Backup

Now that your backup template has been created, it's time to make a backup job to run the template.

1. Enter a name for the backup job.
2. Click the **Select** button of the template to use.

 You can only select one template.



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Provide a name for this job...

Cancel Next

✓ Select Type ———— ✓ Select Template ———— ○ Finish Setup

Select Template + Create Template

Search templates...

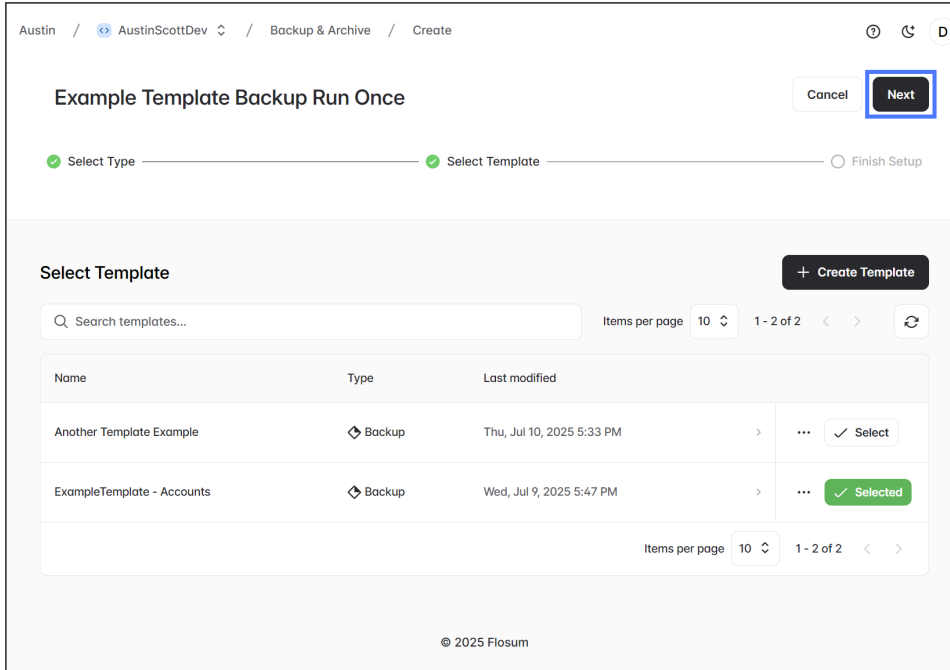
Items per page 10 1 - 2 of 2

Name	Type	Last modified	
Another Template Example	Backup	Thu, Jul 10, 2025 5:33 PM	... ✓ Select
ExampleTemplate - Accounts	Backup	Wed, Jul 9, 2025 5:47 PM	... ✓ Select

Items per page 10 1 - 2 of 2

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3. Click **Next**.



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Example Template Backup Run Once

Cancel **Next**

✓ Select Type ———— ✓ Select Template ———— ○ Finish Setup

Select Template **+ Create Template**

Search templates...

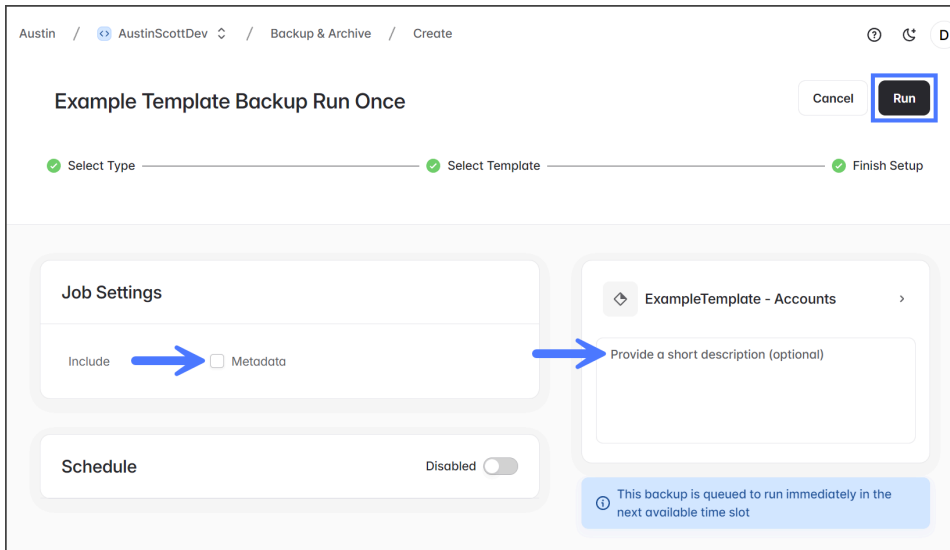
Items per page 10 1 - 2 of 2

Name	Type	Last modified	
Another Template Example	Backup	Thu, Jul 10, 2025 5:33 PM	... ✓ Select
ExampleTemplate - Accounts	Backup	Wed, Jul 9, 2025 5:47 PM	... ✓ Selected

Items per page 10 1 - 2 of 2

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4. (Optional) Check the **Metadata** checkbox in the **Job Settings** section to include metadata in the backup.
5. (Optional) Enter a description of the backup in the textbox.
6. Click the **Run** button to start the Templated Backup.



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Example Template Backup Run Once

Cancel **Run**

✓ Select Type ———— ✓ Select Template ———— ✓ Finish Setup

Job Settings

Include → ☐ Metadata → Provide a short description (optional)

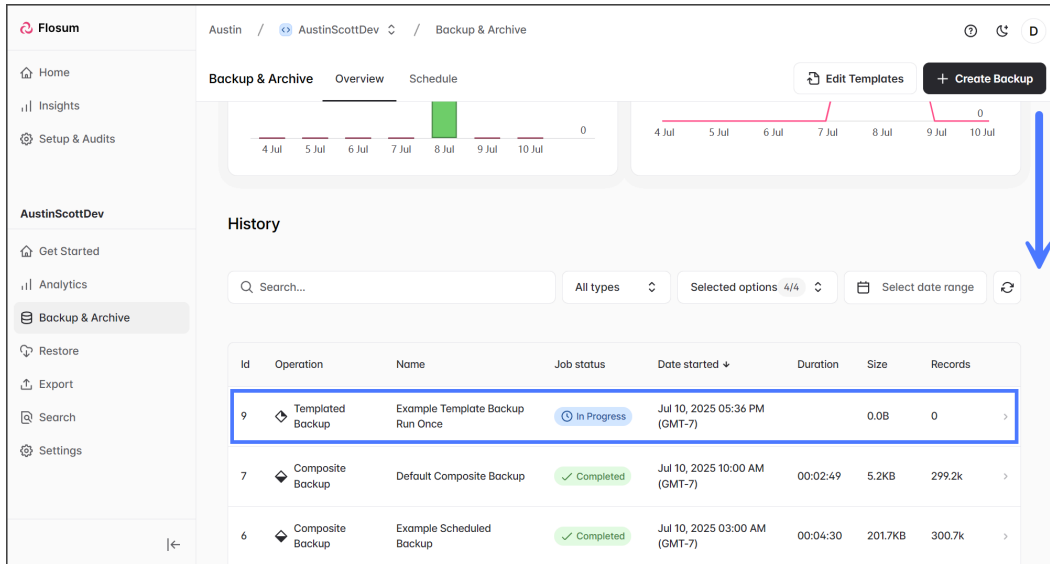
Schedule Disabled ☐

ExampleTemplate - Accounts

This backup is queued to run immediately in the next available time slot

7. The Templated Backup job immediately.

8. Scroll down to the **History** table to view the status of the Backup Job.



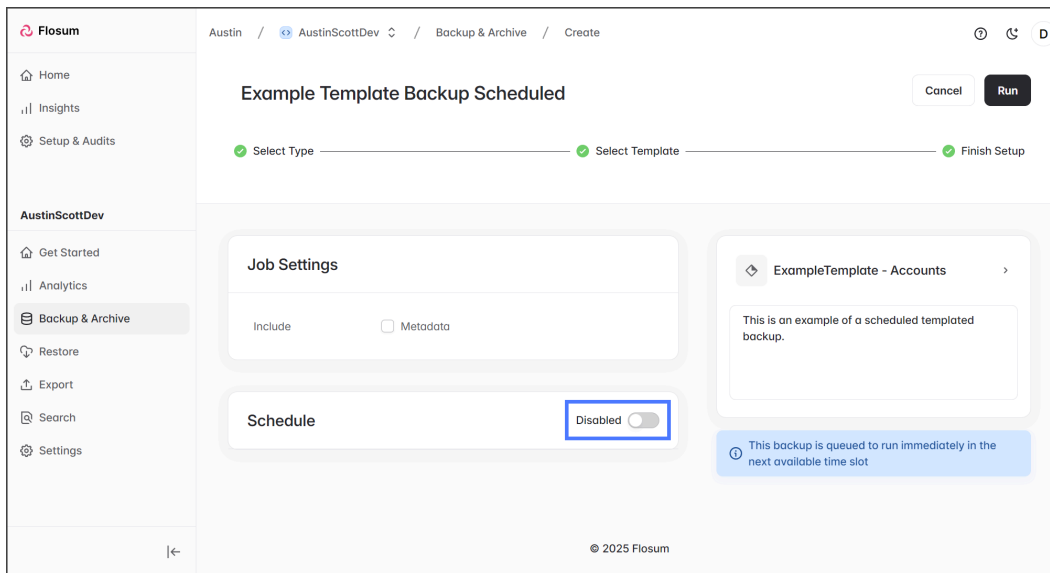
The screenshot shows the Flosum Backup & Archive interface. The left sidebar contains navigation links: Home, Insights, Setup & Audits, AustinScottDev, Get Started, Analytics, Backup & Archive (selected), Restore, Export, Search, and Settings. The main content area is titled 'Backup & Archive' and includes tabs for Overview and Schedule. Below the tabs are two calendar views for July. The 'History' section is highlighted with a blue arrow. It contains a search bar, filters for 'All types' and 'Selected options 4/4', and a 'Select date range' button. The History table lists backup jobs with columns: Id, Operation, Name, Job status, Date started, Duration, Size, and Records.

Id	Operation	Name	Job status	Date started	Duration	Size	Records
9	Templated Backup	Example Template Backup Run Once	In Progress	Jul 10, 2025 05:36 PM (GMT-7)		0.0B	0
7	Composite Backup	Default Composite Backup	Completed	Jul 10, 2025 10:00 AM (GMT-7)	00:02:49	5.2KB	299.2k
6	Composite Backup	Example Scheduled Backup	Completed	Jul 10, 2025 03:00 AM (GMT-7)	00:04:30	201.7KB	300.7k

Schedule a Templated Backup

Alternatively, you can schedule your Template Backup to run at a specific date and time interval. The process is similar to creating an immediate backup.

1. Complete the steps outlined in the [Create a Templated Backup](#) section above. Before clicking **Run**, enable the schedule option.
2. Switch the **Schedule** toggle to **Enabled**.



3. Select the **Recurrence** of the backup to run **Daily**, **Weekly**, or **Monthly**.
4. Configure the **Schedule** options. Daily, Weekly, and Monthly each have different options to set the time and date the backup is run.
5. Click the **Schedule** button to schedule your backup job.

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Example Template Backup Scheduled

Cancel Schedule

✓ Select Type — Select Template — Finish Setup

Job Settings

Include ☐ Metadata

Schedule

Enabled ☒

Recurrence Daily

Repeat every 1 day(s)

Run at 4:00 AM

ExampleTemplate - Accounts

This is an example of a scheduled templated backup.

This backup is planned to run every 1 day(s) at 4:00 AM starting Friday, 11 Jul 2025 PDT

6. Confirm the schedule is correct and click **Save**.

Austin / AustinScottDev / Backup & Archive / Schedule

Example Template Backup Scheduled

Cancel Delete Save

Schedule

Recurrence Daily

Repeat every 1 day(s)

Run at 4:00 AM

Job Settings

Include ☐ Metadata

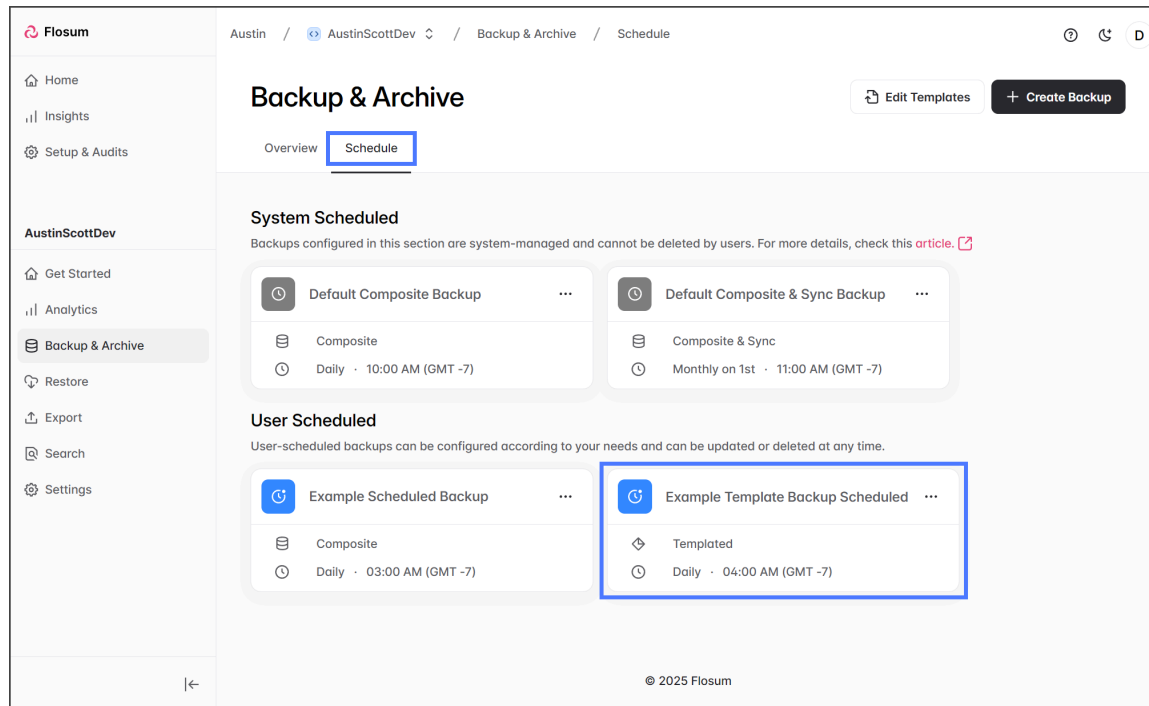
ExampleTemplate - Accounts

This is an example of a scheduled templated backup.

This backup is planned to run every 1 day(s) at 4:00 AM starting Friday, 11 Jul 2025 PDT

View your Scheduled Backup Jobs

All scheduled backups for the selected Org will appear on the **Schedule** tab of the **Backup & Archive** section. Any scheduled backups you have created will be found in the **User Scheduled** section.

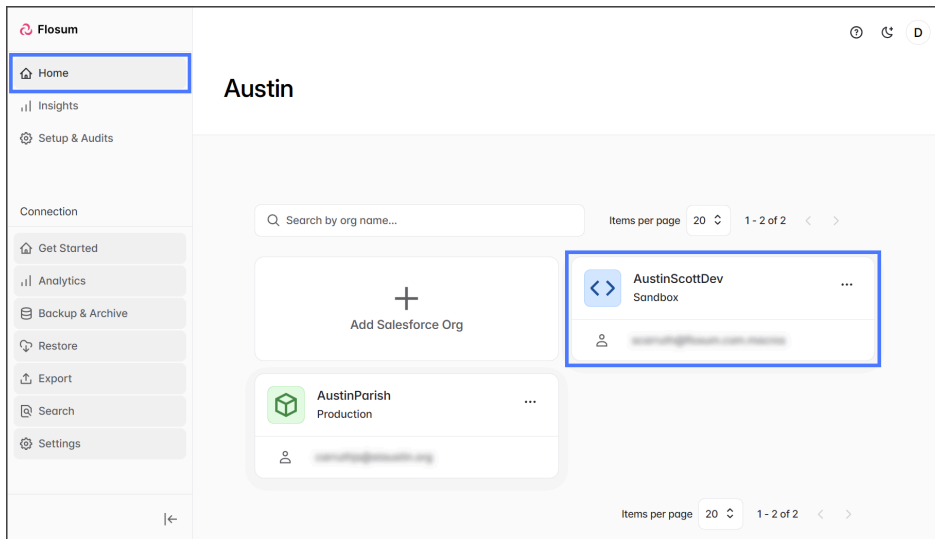


The screenshot shows the Flosum interface for the 'Backup & Archive' section, specifically the 'Schedule' tab. The left sidebar contains navigation links: Home, Insights, Setup & Audits, AustinScottDev (selected), Get Started, Analytics, Backup & Archive (highlighted), Restore, Export, Search, and Settings. The main content area is titled 'Backup & Archive' and has two tabs: 'Overview' and 'Schedule' (selected). Below the tabs, there are two sections: 'System Scheduled' and 'User Scheduled'. The 'System Scheduled' section contains two backup jobs: 'Default Composite Backup' (Daily at 10:00 AM GMT -7) and 'Default Composite & Sync Backup' (Monthly on 1st at 11:00 AM GMT -7). The 'User Scheduled' section contains two backup jobs: 'Example Scheduled Backup' (Daily at 03:00 AM GMT -7) and 'Example Template Backup Scheduled' (Daily at 04:00 AM GMT -7). The 'Example Template Backup Scheduled' job is highlighted with a blue border. At the bottom of the page, there is a copyright notice: '© 2025 Flosum'.

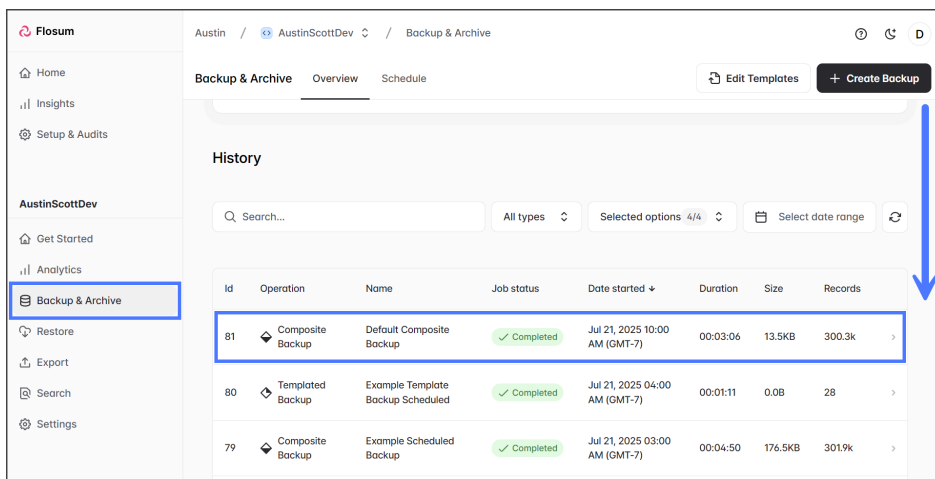
View Job History

Once a backup job is completed, you can access detailed information about the job and the data that was backed up. The job details provide a comprehensive overview, including the data that was backed up, any selected metadata, the specific settings used, and the transaction logs. This feature allows you to gain valuable insights into the backup process and ensures that your data is secure.

1. From the **Home** page, select the **Org** to view the backup job for.



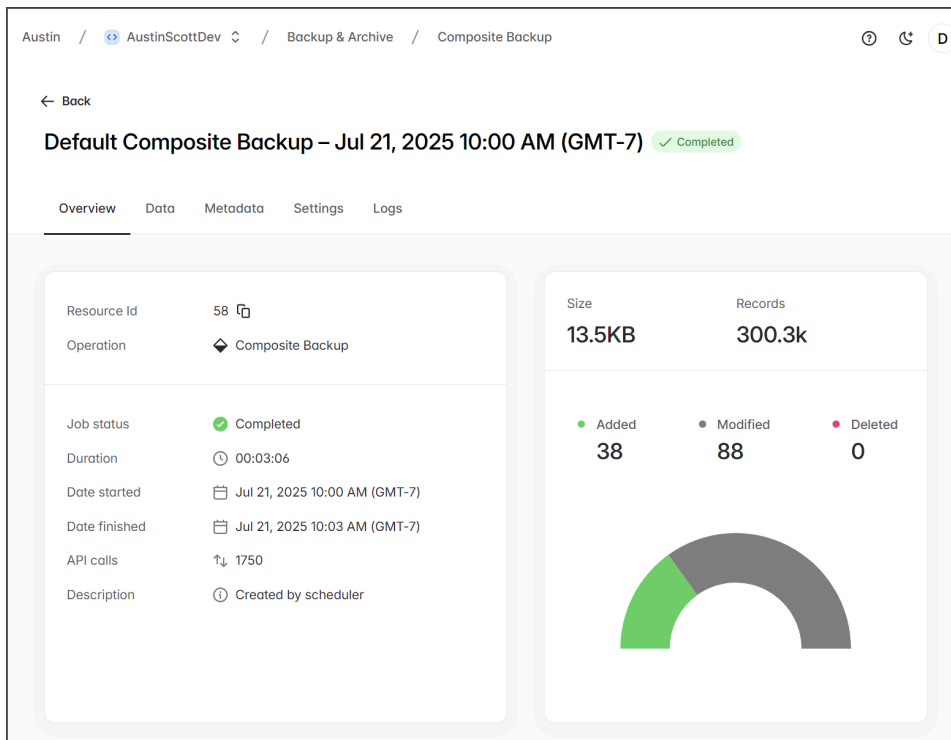
2. Click **Backup & Archive** from the sidebar menu.
3. Scroll down to the **History** table for the list of backup jobs.
4. Click a backup job to view its details.



5. Each of the following sections explains a different tab of the job details.

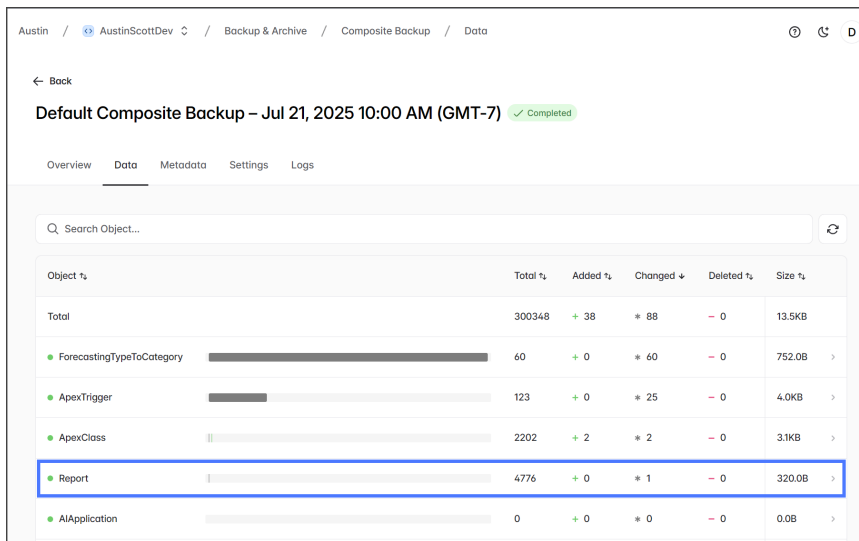
Overview Tab

- The Overview tab provided important information about the backup process. It included details such as the backup type, status, and run time.
- Statistics about the records backed up by this job include backup size, number of records included, and number of records added, modified, and deleted.



Data Tab

- The Data tab shows all objects in the backup. You can search for specific objects and sort the table by any of the columns.



The screenshot shows the 'Data' tab in the Flosum interface. At the top, there's a breadcrumb trail: Austin / AustinScottDev / Backup & Archive / Composite Backup / Data. Below this, a title bar indicates 'Default Composite Backup - Jul 21, 2025 10:00 AM (GMT-7)' with a 'Completed' status. A navigation bar includes 'Overview', 'Data' (selected), 'Metadata', 'Settings', and 'Logs'. A search bar labeled 'Search Object...' is present. The main table lists backup objects with columns for Object, Total, Added, Changed, Deleted, and Size. The 'Report' object is highlighted with a blue border.

Object	Total	Added	Changed	Deleted	Size
Total	300348	+ 38	* 88	- 0	13.5KB
ForecastingTypeToCategory	60	+ 0	* 60	- 0	752.0B
ApexTrigger	123	+ 0	* 25	- 0	4.0KB
ApexClass	2202	+ 2	* 2	- 0	3.1KB
Report	4776	+ 0	* 1	- 0	320.0B
AIApplication	0	+ 0	* 0	- 0	0.0B

- Clicking on an object opens backup details for the object and includes a table of the records contained in the backup. If no records for an object were added, changed, or deleted, no records will be listed here.

Austin / AustinScottDev / Backup & Archive / Composite Backup / Data / Report

← Back

Report

Default Composite Backup - Jul 21, 2025 10:00 AM (GMT-7) >

Status Completed

API calls 2

Duration 00:00:00


Start date Jul 21, 2025 10:02 AM (GMT-7)

End date Jul 21, 2025 10:02 AM (GMT-7)

Size **320.0B**

Records **1**

Added **0** Modified **1** Deleted **0**



Records

Search Records...

All - 1 Added - 0 Changed - 1 Deleted - 0

Id	Status	Name	Owner	Last modified %
0001P000003IS4KUAE	Changed	BDR Unworked MQLs	Flosum	Jul 21, 2025 04:22 AM (GMT-7)

Items per page: 10 1 - 1 of 1

- Clicking on a record allows you to view the field **Details** for the record.

Austin / AustinScottDev / Backup & Archive / Composite Backup / Data / Report / 0001P000003IS4KUAE

← Back

BDR Unworked MQLs 0001P000003IS4KUAE

Default Composite Backup - Jul 21, 2025 10:00 AM (GMT-7) >

Name BDR Unworked MQLs

Owner Flosum

Last Modified 2025-07-21T11:22:25.000Z

Fields **17**

Fields

Details History Search fields...

Id 0001P000003IS4KUAE	OwnerId 00DOu00006BV1pMAG	FolderName Public Reports
CreatedDate 2022-04-04T17:24:44.000+0000	CreatedById 0051P000004E1QRQA0	LastModifiedDate 2024-04-07T11:30:17.000+0000
LastModifiedById 0051P000003FREQAW	IsDeleted false	Name BDR Unworked MQLs
Description	DeveloperName	NamespacePrefix

- The **History** tab allows you to compare the fields to previous versions.
- Use the **Select version** dropdown menu to pick a version to compare this version to.

- Click the **Show/Hide identical fields** button to toggle between showing all fields and showing only changed fields.

Austin / AustinScottDev / Backup & Archive / Composite Backup / Data / Report / 0001P000003IS4kUAE

← Back

BDR Unworked MQLs 0001P000003IS4kUAE
Default Composite Backup - Jul 21, 2025 10:00 AM (GMT-7) >

Name: BDR Unworked MQLs

Owner: Flosum

Last Modified: 2025-07-21T11:22:25.000Z

Fields: 17

Fields

Details **History** Search fields...

This version
Jul 21, 2025 10:00 AM (GMT-7)
Default Composite Backup

Version to compare
Jul 21, 2025 10:00 AM (GMT-7)
Default Composite Backup

Select version

Show identical fields

Last Run 2025-07-21T11:22:25.000+0000	Last Run 2025-07-10T11:22:01.000+0000
System Modstamp 2025-07-21T11:22:25.000+0000	System Modstamp 2025-07-10T11:22:01.000+0000

Metadata Tab

- The Metadata tab shows all metadata objects in the backup. You can search for specific objects and sort the table by any of the columns.

Austin / AustinScottDev / Backup & Archive / Composite Backup / Metadata

← Back

Backup with Metadata – Jul 29, 2025 09:59 PM (GMT-7) ✓ Completed

Overview Data **Metadata** Settings Logs

Search Object...

Object	Components
Total	14543
AnalyticSnapshot	1
AnimationRule	1
ApexClass	397
ApexComponent	12
ApexEmailNotifications	1
ApexPage	45

- Clicking on a metadata object opens a list of records for that object.

Austin / AustinScottDev / Backup & Archive / Composite Backup / Metadata / ApexComponent

Back

ApexComponent

Backup with Metadata - Jul 29, 2025 09:59 PM (GMT-7) >

Status

Backed up

Name

components

Count

12

Records

Search Records...

Name	Last modified
WebinarList	Sep 10, 2020 09:28 AM (GMT-7)
UserProfilePhoto	Sep 19, 2023 03:47 AM (GMT-7)
SitePoweredBy	Jul 17, 2016 11:42 PM (GMT-7)
SiteLogin	Jul 17, 2016 11:42 PM (GMT-7)
SiteHeader	Jul 17, 2016 11:42 PM (GMT-7)

- Clicking on a record allows you to view the field values for the record.

Austin / AustinScottDev / Backup & Archive / Composite Backup / Metadata / ApexComponent / 44018

← Back

WebinarList
Backup with Metadata - Jul 29, 2025 09:59 PM (GMT-7) >

Fields

id 44018	name WebinarList	filename components/WebinarList.component
componentId 0991P00000024vLQAQ	createdById 0051P000003FRFEQAW	createdByName Austin Scott Dev
createdDate 2020-09-10T16:28:02.000Z	lastModifiedById 0051P000003FRFEQAW	lastModifiedByName Austin Scott Dev
lastModifiedDate 2020-09-10T16:28:05.000Z	manageableState unmanaged	namespacePrefix

Settings Tab

- The Settings tab displays the **Job Settings** chosen for this backup. The objects included in the backup are indicated with a grayed-out checkbox with a checkmark. In the example below, all objects are included.

Austin / AustinScottDev / Backup & Archive / Composite Backup / Settings ? ↻ D

← Back

Backup with Metadata – Jul 29, 2025 09:59 PM (GMT-7) ✓ Completed

Overview Data Metadata Settings Logs

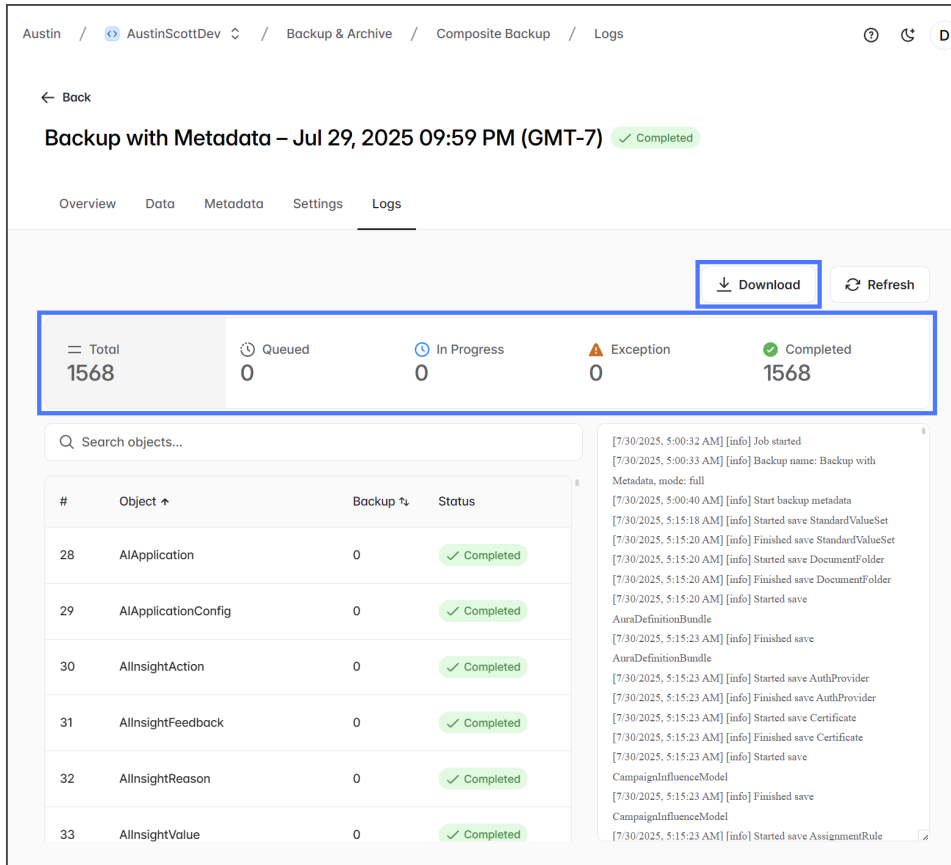
Job Settings

Include

- ☒ Metadata
- ☒ Big Objects
- ☒ Binary Objects
- ☒ Tag Objects
- ☒ History Objects
- ☒ Feed Objects
- ☒ Share Objects
- ☒ Custom Metadata Type Objects

Logs Tab

- The Logs tab displays a list of all objects the job analyzed, along with the job log entries. The table of objects is searchable and can be filtered by column.
- You can filter the objects by their status by choosing **Total**, **Queued**, **In Progress**, **Exception**, or **Completed** from the status bar above the search bar.
- Clicking the **Download** button will save a CSV file of the backup job's logs.



The screenshot shows the 'Logs' tab for a backup job titled 'Backup with Metadata – Jul 29, 2025 09:59 PM (GMT-7)' with a 'Completed' status. The interface includes a navigation bar with 'Overview', 'Data', 'Metadata', 'Settings', and 'Logs'. A 'Download' button is highlighted in the top right. Below the navigation bar, a status bar shows the following counts: Total (1568), Queued (0), In Progress (0), Exception (0), and Completed (1568). A search bar labeled 'Search objects...' is positioned above a table of objects. The table has columns for '#', 'Object', 'Backup', and 'Status'. The first six rows of the table are as follows:

#	Object	Backup	Status
28	AIApplication	0	Completed
29	AIApplicationConfig	0	Completed
30	AllInsightAction	0	Completed
31	AllInsightFeedback	0	Completed
32	AllInsightReason	0	Completed
33	AllInsightValue	0	Completed

On the right side of the table, a log viewer displays the following log entries:

```
[7/30/2025, 5:00:32 AM] [info] Job started
[7/30/2025, 5:00:33 AM] [info] Backup name: Backup with Metadata, mode: full
[7/30/2025, 5:00:40 AM] [info] Start backup metadata
[7/30/2025, 5:15:18 AM] [info] Started save StandardValueSet
[7/30/2025, 5:15:20 AM] [info] Finished save StandardValueSet
[7/30/2025, 5:15:20 AM] [info] Started save DocumentFolder
[7/30/2025, 5:15:20 AM] [info] Finished save DocumentFolder
[7/30/2025, 5:15:20 AM] [info] Started save AuraDefinitionBundle
[7/30/2025, 5:15:23 AM] [info] Finished save AuraDefinitionBundle
[7/30/2025, 5:15:23 AM] [info] Started save AuthProvider
[7/30/2025, 5:15:23 AM] [info] Finished save AuthProvider
[7/30/2025, 5:15:23 AM] [info] Started save Certificate
[7/30/2025, 5:15:23 AM] [info] Finished save Certificate
[7/30/2025, 5:15:23 AM] [info] Started save CampaignInfluenceModel
[7/30/2025, 5:15:23 AM] [info] Finished save CampaignInfluenceModel
[7/30/2025, 5:15:23 AM] [info] Started save AssignmentRule
```

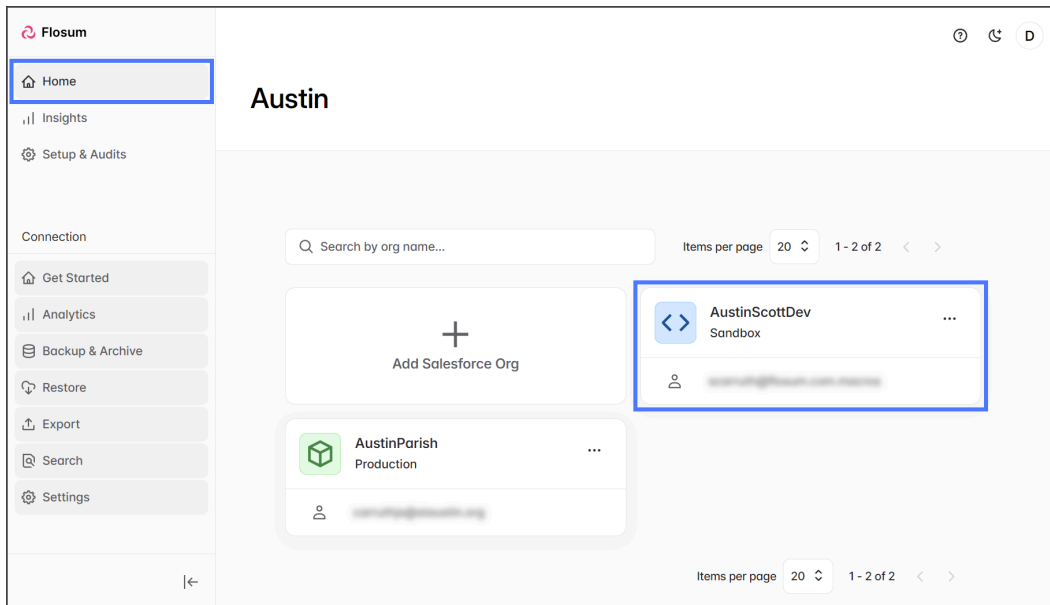
Archive Operations

A **Templated Archive** in Flosum's Backup & Archive app lets you archive specific Salesforce data. Archives ensure efficient long-term storage while safeguarding critical business records. An Archive Job consists of two stages: first, the data is added to the archive in Flosum Backup & Archive, and then the data is deleted from Salesforce.

The **Retain This Object** feature enables users to archive child records while keeping parent records intact — perfect for archiving attachments while retaining Cases or Opportunities. Refer to the [Enable Retain This Object](#) section for more information about this feature.

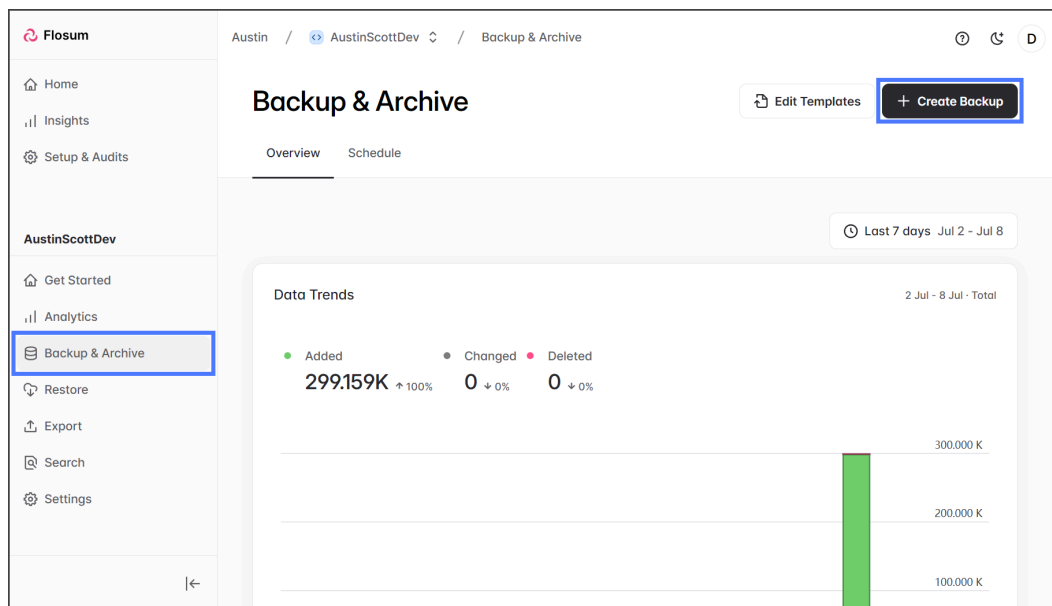
Create a Templated Archive

1. From the **Home** page, select the **Org** to archive.

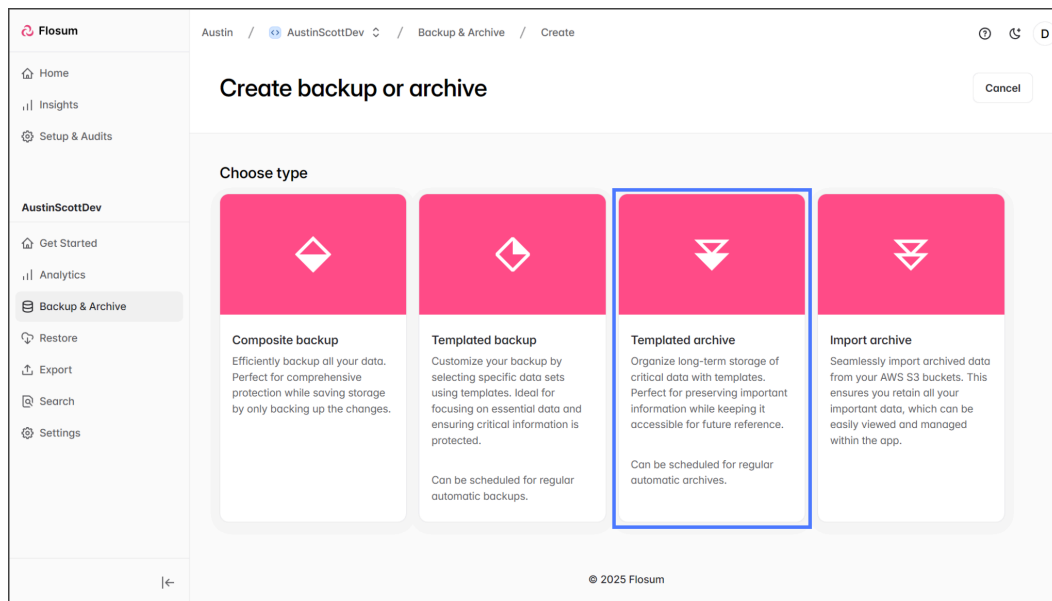


2. Click **Backup & Archive** from the sidebar menu.

3. Click **Create Backup**.



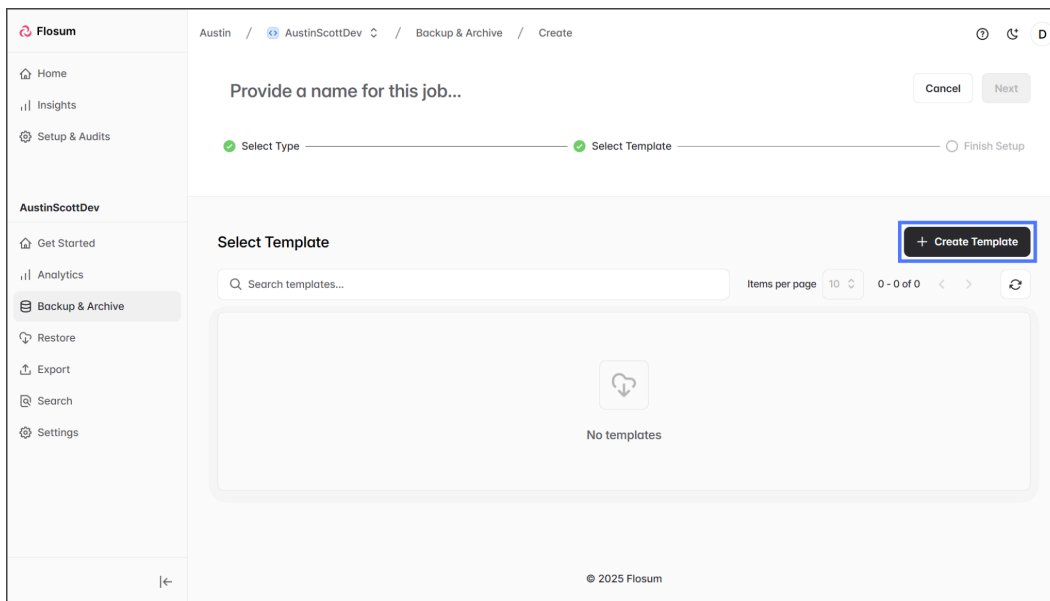
4. Click **Templated Archive**.



Create a Template

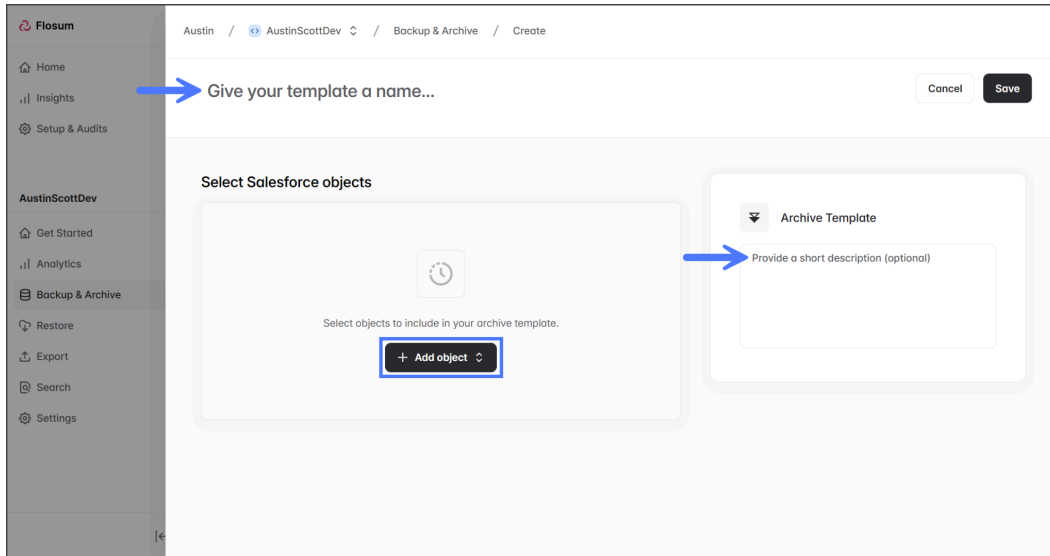
If there are no templates or you need to create a new one, follow the instructions below. Skip to [Finish Creating Templated Archive](#) if you don't need to create a template.

1. Click **Create Template** if there are no templates or if you need to create a new one.

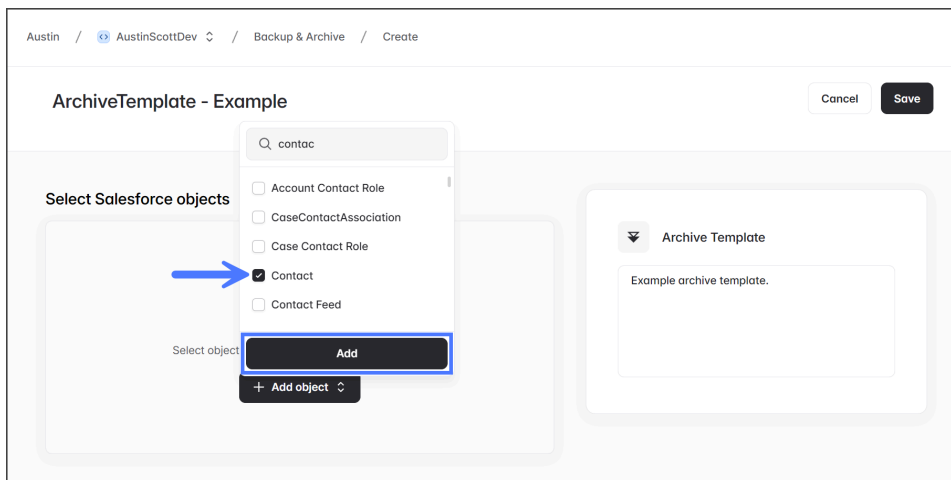


2. Enter a **Name** for the template.
3. Enter a helpful **Description** of the template's purpose in the optional **Archive Template** textbox.

- Click the **Add object** menu button to select the Salesforce Objects to include in the template.



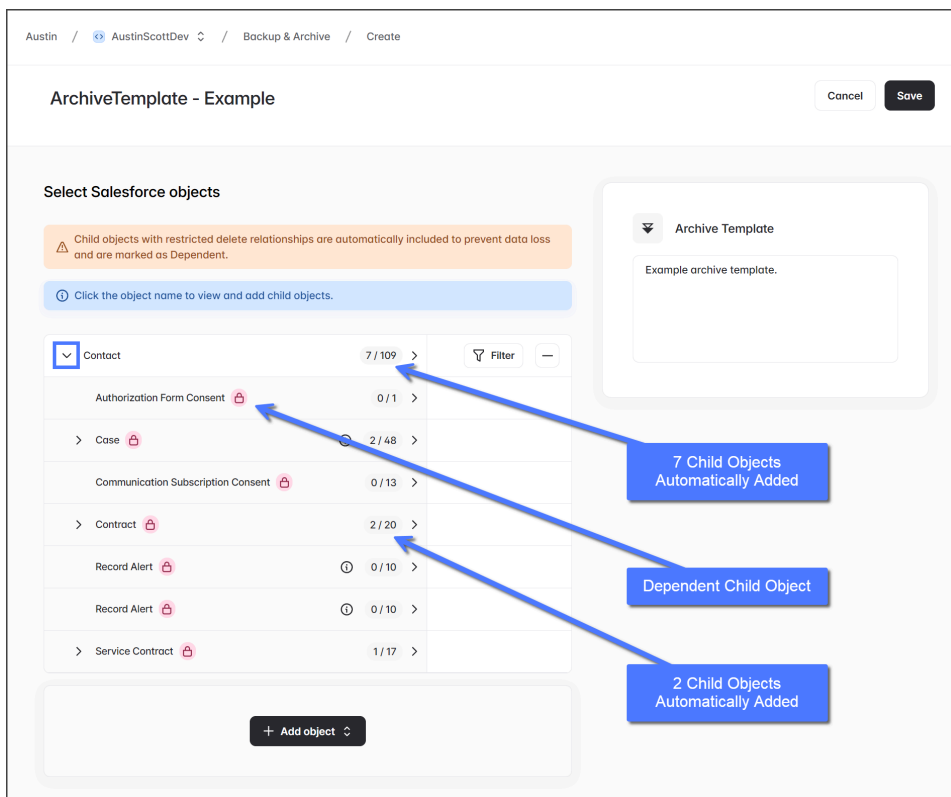
- Search or browse for objects from the menu.
- Check the objects you want to add.
- Click **Add** to add all of the selected objects.



- When an object is added to the archive, any child objects that are dependent on the parent object will automatically be added to the archive.

- Click the > arrow to expand an object to see all of its child objects.

i Every child object marked with a **Red Lock** icon is automatically added to the archive because it is dependent on its parent object. In the screenshot below, the **Contact** object has seven child objects that were automatically archived. Additionally, some of these child objects have their own dependent child objects, which were also included in the archive. This dependency results in a cascading delete; when the **Contact** object is archived, it will lead to the deletion of many child and grandchild objects from Salesforce. It is important to be aware of which object records will be removed from Salesforce when an archive job is run.



The screenshot shows the 'ArchiveTemplate - Example' interface. Under 'Select Salesforce objects', there is a table of objects. The 'Contact' object is selected, and its child objects are listed below it. Blue arrows point from the 'Contact' object to its child objects, with callouts indicating that 7 child objects are automatically added, including dependent child objects and 2 more child objects.

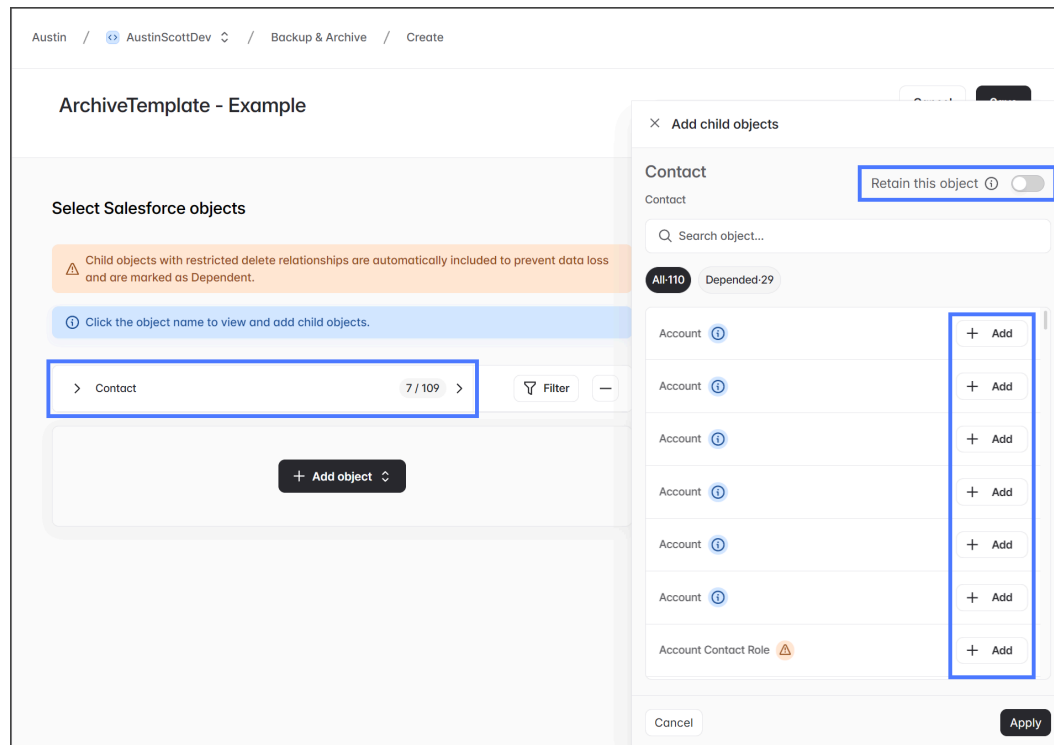
Object	Count	Filter
Contact	7 / 109	Filter
Authorization Form Consent	0 / 1	
Case	2 / 48	
Communication Subscription Consent	0 / 13	
Contract	2 / 20	
Record Alert	0 / 10	
Record Alert	0 / 10	
Service Contract	1 / 17	

Callouts in the screenshot:

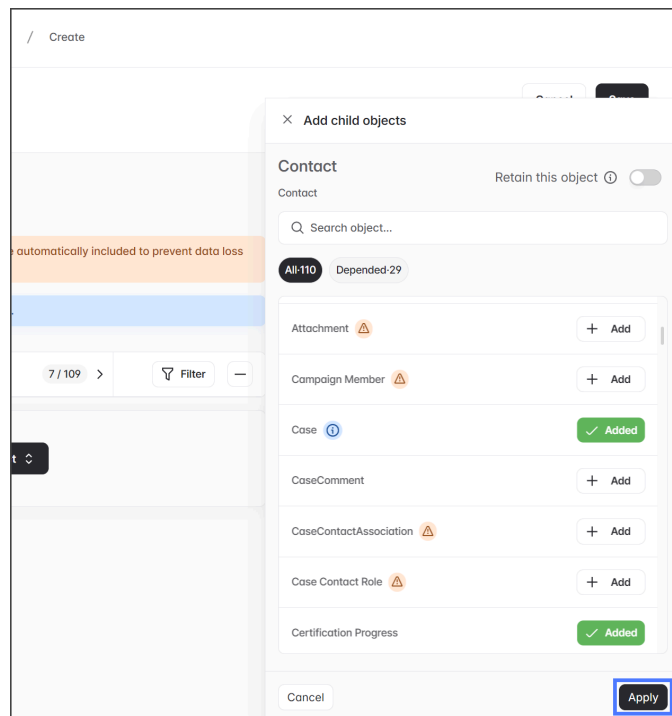
- 7 Child Objects Automatically Added
- Dependent Child Object
- 2 Child Objects Automatically Added

- Click an object to open the **Add child objects** dialog.
- See the [Enable Retain This Object](#) section below to learn how to use the **Retain this object** feature.

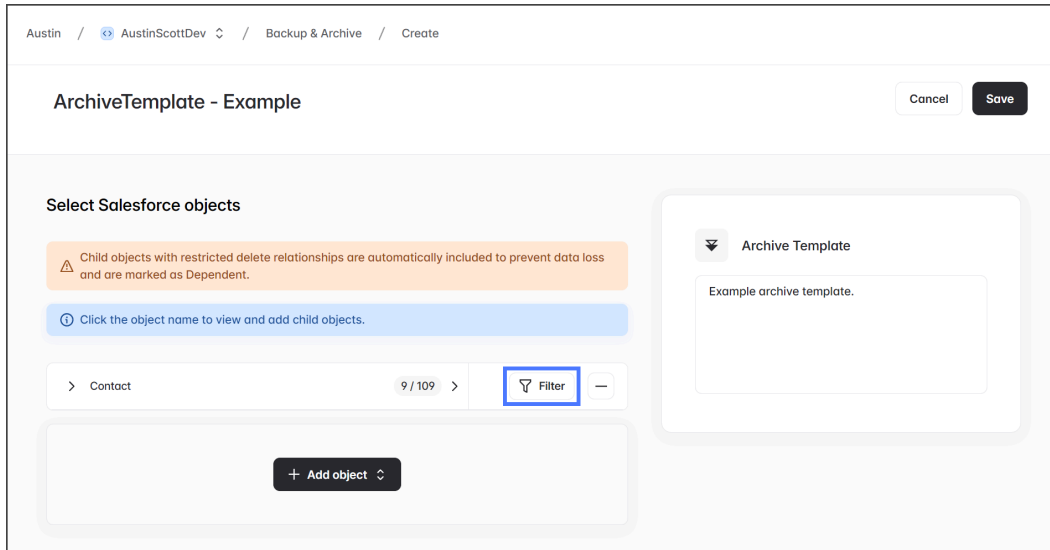
12. Click the **+ Add** button next to each of the child objects to add.



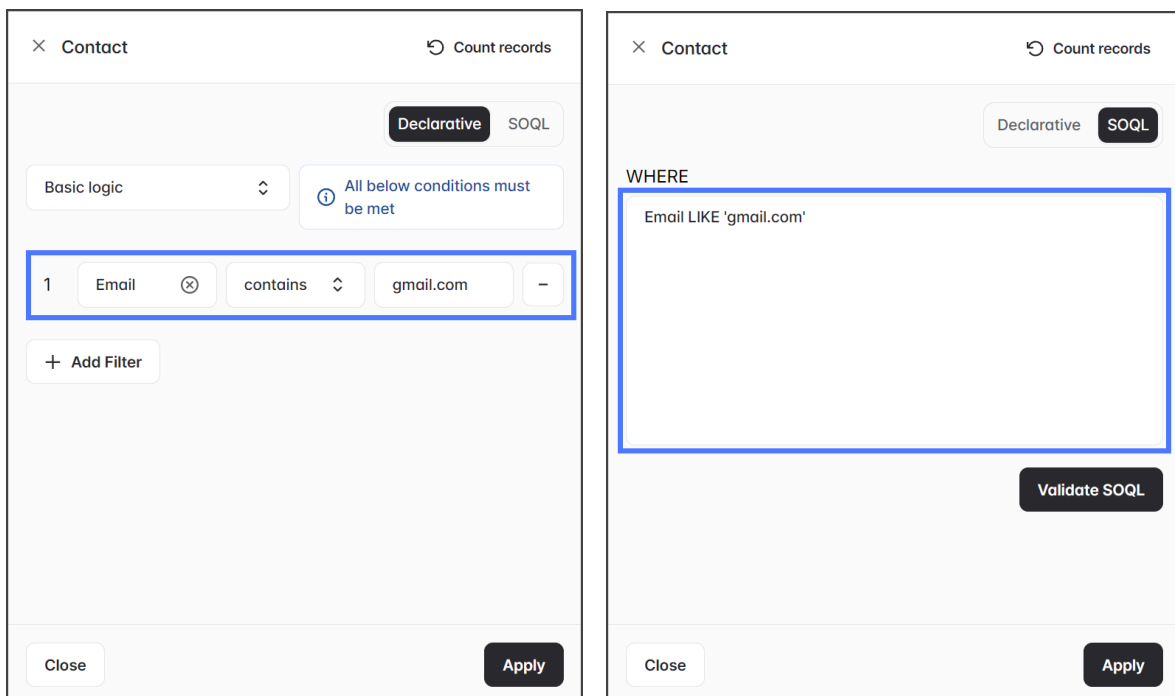
13. Once you have added all the objects, click **Apply** to save the changes.



14. (Optional) Click **Filter** to add a filter to the object.

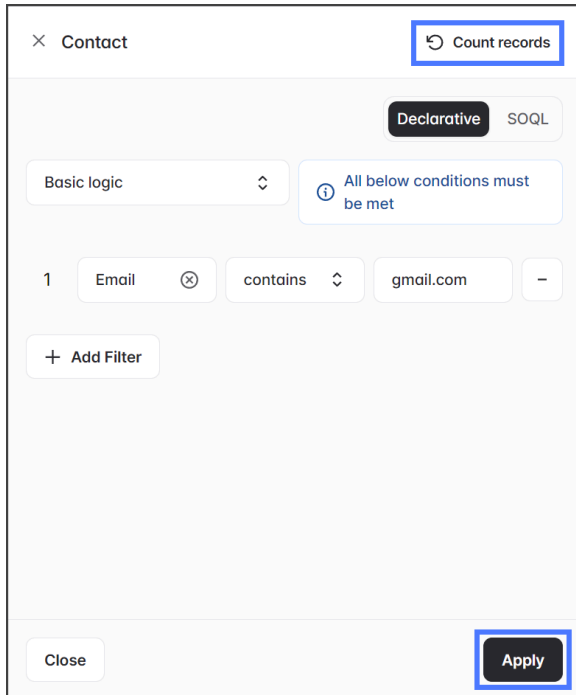


15. You can choose to filter using **Declarative** criteria, similar to Salesforce reporting, or through an **SOQL** query. An example of the same filter created each way is shown in the screenshots below.



16. (Optional) Click the **Count records** button to verify that the filter is retrieving the correct number of records.

17. Click **Apply** to save the filter.



× Contact Count records

Declarative SOQL

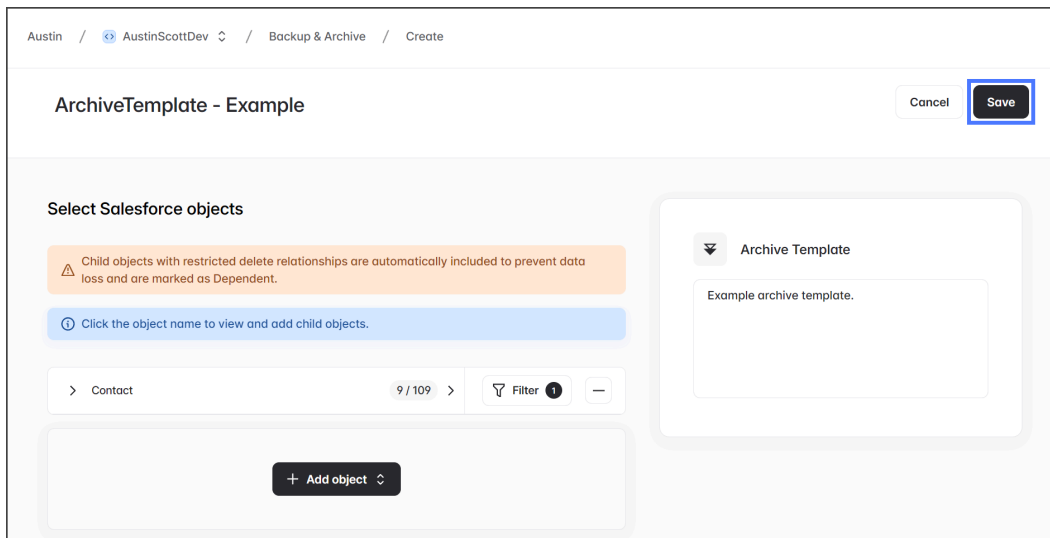
Basic logic

1 Email contains gmail.com

+ Add Filter

Close Apply

18. Click **Save** once you have configured all of the objects for this template.



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ArchiveTemplate - Example Cancel Save

Select Salesforce objects

Child objects with restricted delete relationships are automatically included to prevent data loss and are marked as Dependent.

Click the object name to view and add child objects.

Contact 9 / 109 Filter 1

+ Add object

Archive Template

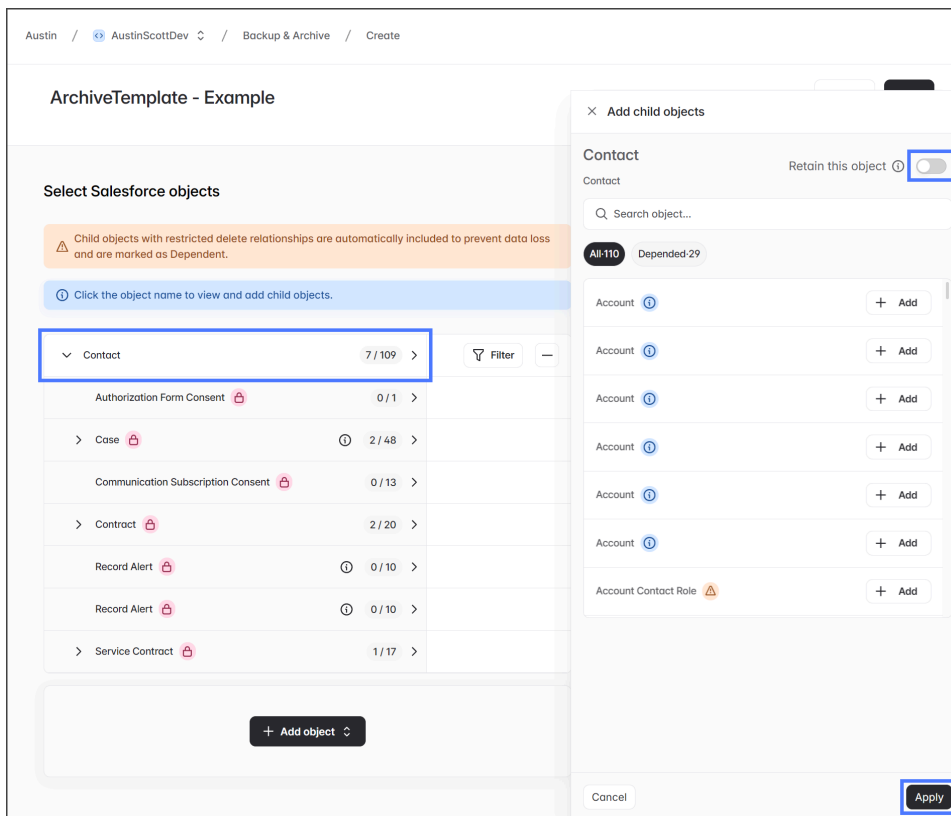
Example archive template.

Enable Retain This Object


The **Retain This Object** feature provides more control over what objects are deleted from Salesforce. With this feature, you can mark objects added to an archive as **Retained**, meaning that the object will be included in the archive but also remain in Salesforce. A child object that is not **retained** will still be deleted. The instructions below demonstrate how to use this feature and provide examples to illustrate the expected outcome.

i By default, objects do not have **Retain This Object** enabled. Which means they will be deleted from Salesforce when archived.

1. Click an object to open the **Add child objects** dialog.
2. Click the **Retain this object** toggle to enable it.
3. Click **Apply** to save the changes.





- Once **Retain this object** is enabled, a **Green Shield** icon will appear next to the object.










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ArchiveTemplate - Example Cancel Save

Select Salesforce objects

 Child objects with restricted delete relationships are automatically included to prevent data loss and are marked as Dependent.

 Click the object name to view and add child objects.

Object	Count	Filter
▼ Contact 	7 / 109	Filter
Authorization Form Consent 	0 / 1	
> Case 	2 / 48	
Communication Subscription Consent 	0 / 13	
> Contract  	2 / 20	
Record Alert 	0 / 10	
Record Alert 	0 / 10	
> Service Contract 	1 / 17	

+ Add object

Archive Template

Example archive template.

Retain This Object Enabled

Example 1:

In this example, the **Contact** and **Contact >> Contract** objects are both marked as **Retained**. The screenshot below indicates which objects will be deleted from Salesforce and which will be saved.

i The **Case**, **Contract**, and **Service Contract** objects each have dependent child objects that will also be deleted. It's important to understand that a cascading delete can extend through multiple levels of objects. However, for simplicity, this example only lists the child objects that are directly dependent on the root parent object.

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ArchiveTemplate - Example

Select Salesforce objects


⚠ Child objects with restricted delete relationships are automatically included to prevent data loss and are marked as Dependent.

i Click the object name to view and add child objects.

	Object Name	Count	Status	Filter	More
Save	Contact ✔	7 / 109		Filter	—
Delete	Authorization Form Consent 🔒	0 / 1			
Delete	> Case 🔒	i 2 / 48			
Delete	Communication Subscription Consent 🔒	0 / 13			
Save	> Contract 🔒 ✔	2 / 20			
Delete	Record Alert 🔒	i 0 / 10			
Delete	Record Alert 🔒	i 0 / 10			
Delete	> Service Contract 🔒	1 / 17			

Example 2:


In this example, only the **Contact >> Contract** object is marked as **Retained**. However, because **Contact >> Contract** is dependent on its parent, it will still be deleted because **Contact** will be deleted, which will trigger a cascading delete of **Contact >> Contract**. The screenshot below indicates which objects will be deleted from Salesforce and which will be saved.


 This example illustrates the importance of understanding how dependency works when using the **Retain This Object** feature. Objects marked as **Retained** will still be deleted if they are dependent on a parent that is deleted.












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ArchiveTemplate - Example

Select Salesforce objects

 Child objects with restricted delete relationships are automatically included to prevent data loss and are marked as Dependent.

 Click the object name to view and add child objects.

	Object Name	Count		
Delete	Contact	7 / 109	>	Filter —
Delete	Authorization Form Consent 	0 / 1	>	
Delete	> Case 	 2 / 48	>	
Delete	Communication Subscription Consent 	0 / 13	>	
Delete	> Contract  	2 / 20	>	
Delete	Record Alert 	 0 / 10	>	
Delete	Record Alert 	 0 / 10	>	
Delete	> Service Contract 	1 / 17	>	

Example 3:

In this example, only the **Contact >> Client Answer** object is marked as **Retained**. Since **Contact >> Client Answer** is not dependent on its parent, it will be saved even after the **Contact** object is deleted. The screenshot below indicates which objects will be deleted from Salesforce and which will be saved.

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ArchiveTemplate - Example

Select Salesforce objects

Child objects with restricted delete relationships are automatically included to prevent data loss and are marked as Dependent.

Click the object name to view and add child objects.

Delete	Contact	8 / 109	Filter
Delete	Authorization Form Consent	0 / 1	
Delete	Case	2 / 48	
Delete	Communication Subscription Consent	0 / 13	
Delete	Contract	2 / 20	
Delete	Record Alert	0 / 10	
Delete	Record Alert	0 / 10	
Delete	Service Contract	1 / 17	
Save	Client Answer	0 / 18	

Example 4:

In this example, all objects are marked as **Retained** except for **Contact >> Content Document**. This is a practical example of archiving files attached to a contact while retaining the rest of the Contact record in Salesforce. The screenshot below indicates which objects will be deleted from Salesforce and which will be saved.

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ArchiveTemplate - Example

Select Salesforce objects

Child objects with restricted delete relationships are automatically included to prevent data loss and are marked as Dependent.


Click the object name to view and add child objects.

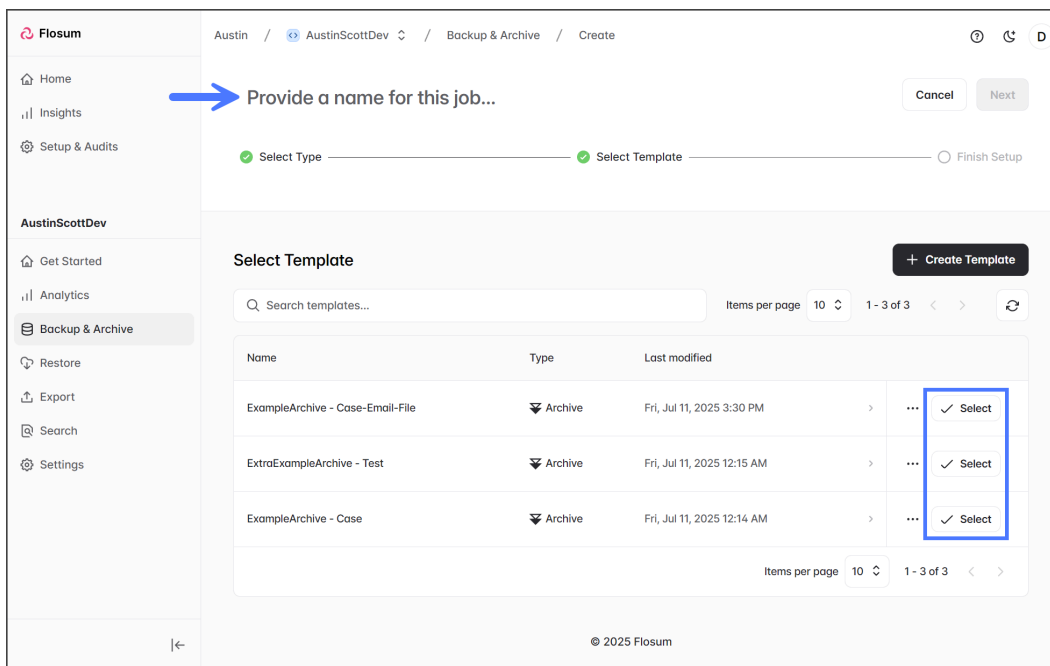
Save	Contact	8 / 109	>	Filter	—
Save	Authorization Form Consent	0 / 1	>		
Save	> Case	2 / 48	>		
Save	Communication Subscription Consent	0 / 13	>		
Save	> Contract	2 / 20	>		
Save	Record Alert	0 / 10	>		
Save	Record Alert	0 / 10	>		
Save	> Service Contract	1 / 17	>		
Delete	Content Document				—

Finish Creating Templated Archive




Now that your archive template has been created, it's time to make an archive job to run the template.

1. Enter a name for the archive job.
2. Click the **Select** button of the template to use.

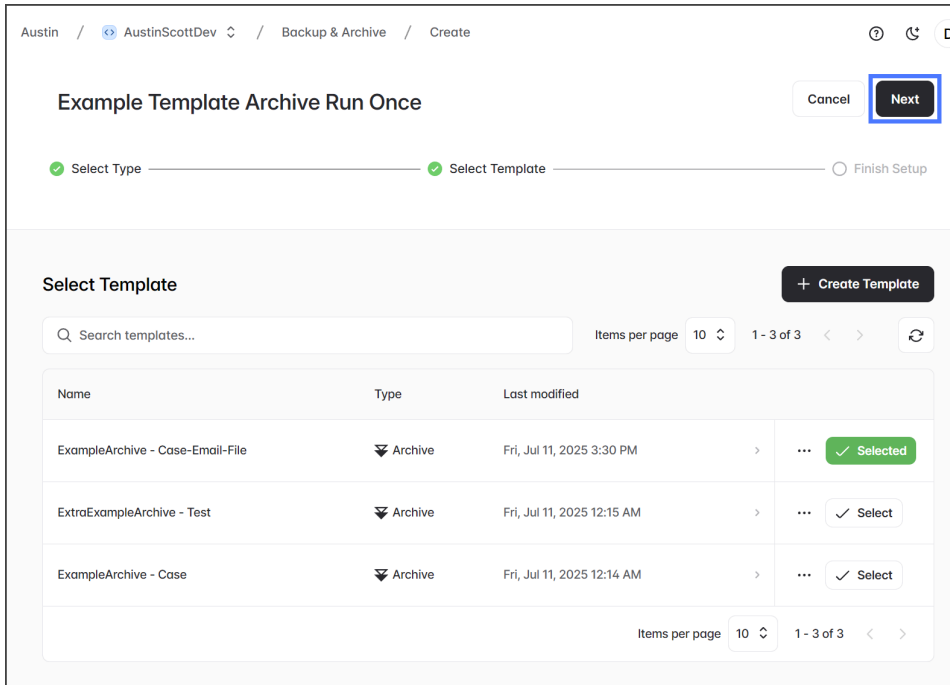
 You can only select one template.



The screenshot shows the Flosum interface for creating an archive job. The sidebar on the left includes links to Home, Insights, Setup & Audits, and Backup & Archive. The main content area is titled "Provide a name for this job..." and features a "Cancel" button and a "Next" button. Below this is a "Select Template" section with a search bar and a table of templates. The table has columns for Name, Type, Last modified, and a "Select" button. The "Select" button for the first template, "ExampleArchive - Case-Email-File", is highlighted with a blue box.

Name	Type	Last modified	
ExampleArchive - Case-Email-File	Archive	Fri, Jul 11, 2025 3:30 PM	
ExtraExampleArchive - Test	Archive	Fri, Jul 11, 2025 12:15 AM	
ExampleArchive - Case	Archive	Fri, Jul 11, 2025 12:14 AM	

3. Click **Next**.



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Example Template Archive Run Once

Cancel Next

Select Type — Select Template — Finish Setup

Select Template

+ Create Template

Search templates...

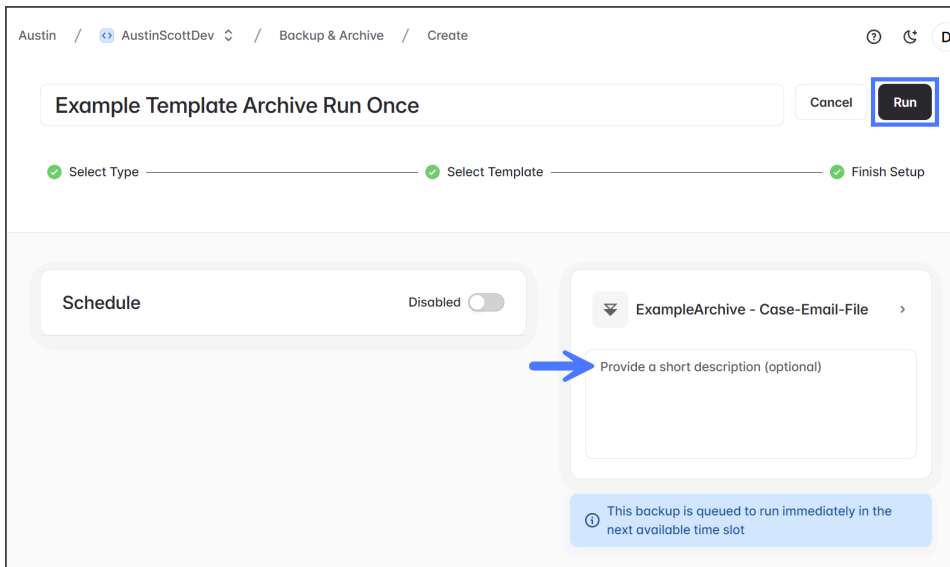
Items per page 10 1 - 3 of 3

Name	Type	Last modified
ExampleArchive - Case-Email-File	Archive	Fri, Jul 11, 2025 3:30 PM
ExtraExampleArchive - Test	Archive	Fri, Jul 11, 2025 12:15 AM
ExampleArchive - Case	Archive	Fri, Jul 11, 2025 12:14 AM

Items per page 10 1 - 3 of 3

4. (Optional) Enter a description of the archive in the textbox.

5. Click the **Run** button to start the Templated Archive.



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Example Template Archive Run Once

Cancel Run

Select Type — Select Template — Finish Setup

Schedule Disabled

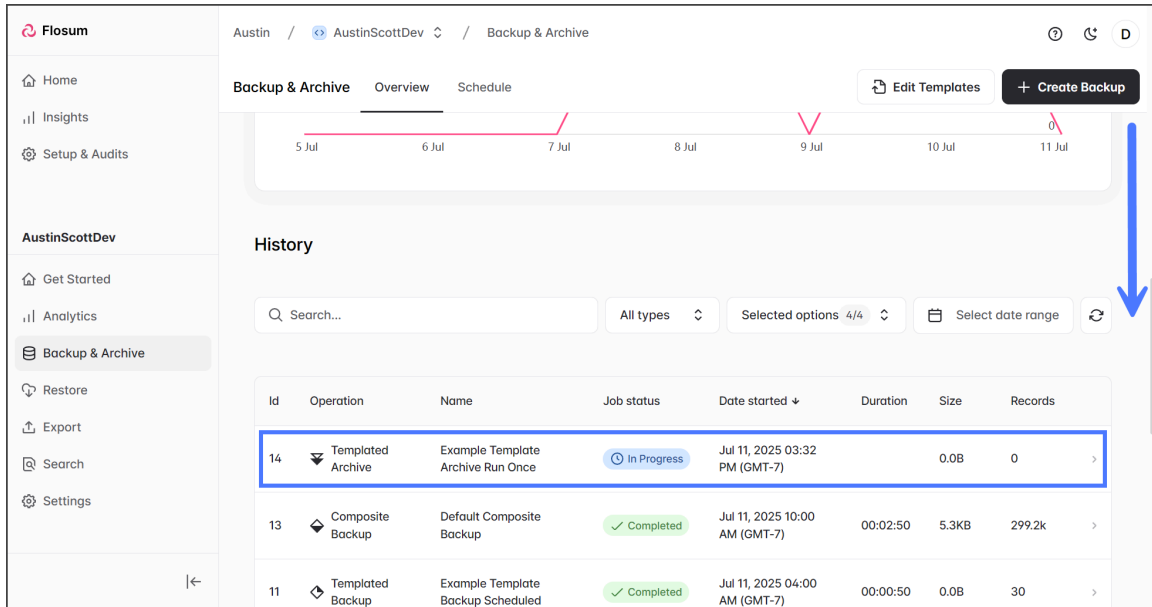
ExampleArchive - Case-Email-File

Provide a short description (optional)

This backup is queued to run immediately in the next available time slot

6. This will start your Templated Archive job immediately.

7. Scroll down to the **History** table to view the status of the Archive Job.



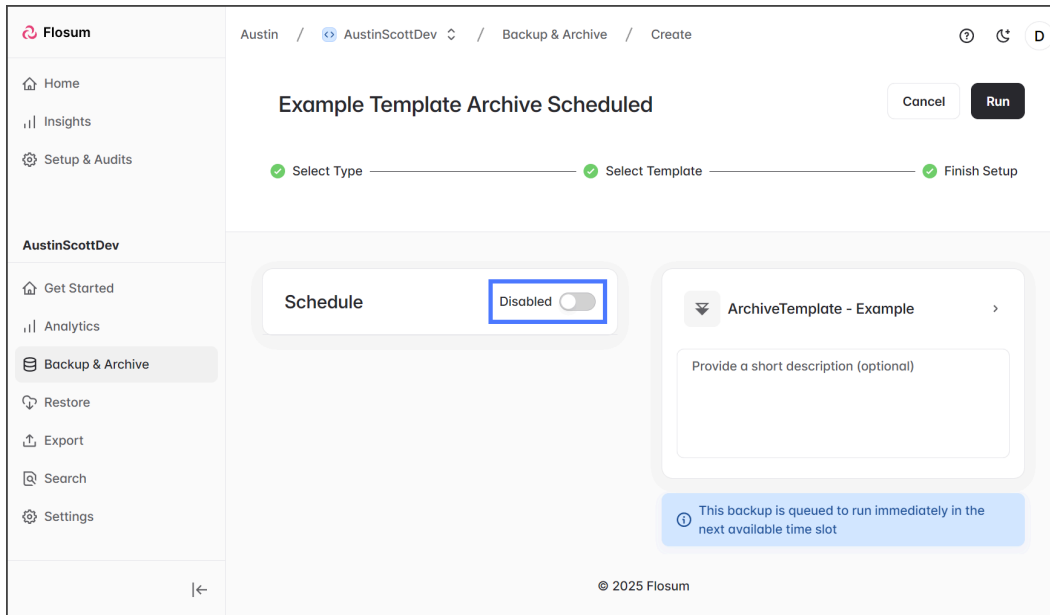
The screenshot shows the Flosum Backup & Archive interface. The left sidebar contains navigation links: Home, Insights, Setup & Audits, AustinScottDev, Get Started, Analytics, Backup & Archive (selected), Restore, Export, Search, and Settings. The main content area has tabs for Backup & Archive, Overview, and Schedule. A timeline at the top shows dates from 5 Jul to 11 Jul. Below the timeline is the History table, which is highlighted by a blue arrow. The table has columns: Id, Operation, Name, Job status, Date started, Duration, Size, and Records. The first row (Id 14) is highlighted with a blue border and shows a 'Templated Archive' operation that is 'In Progress'. The second row (Id 13) shows a 'Composite Backup' operation that is 'Completed'. The third row (Id 11) shows a 'Templated Backup' operation that is 'Completed'.

Id	Operation	Name	Job status	Date started	Duration	Size	Records
14	Templated Archive	Example Template Archive Run Once	In Progress	Jul 11, 2025 03:32 PM (GMT-7)		0.0B	0
13	Composite Backup	Default Composite Backup	Completed	Jul 11, 2025 10:00 AM (GMT-7)	00:02:50	5.3KB	299.2k
11	Templated Backup	Example Template Backup Scheduled	Completed	Jul 11, 2025 04:00 AM (GMT-7)	00:00:50	0.0B	30

Schedule an Archive Job

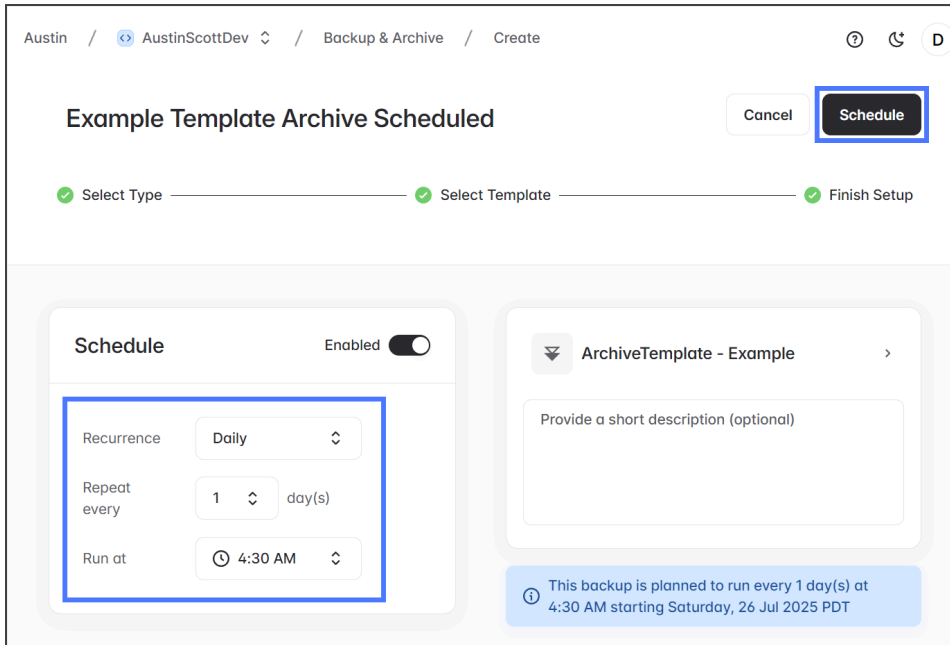
Alternatively, you can schedule your Template Archive to run at a specific date and time interval. The process is similar to creating an immediate archive.

1. Complete the steps outlined in the [Create a Templated Archive](#) section above. Before clicking **Run**, enable the schedule option.
2. Switch the **Schedule** toggle to **Enabled**.



3. Select the **Recurrence** of the backup to run **Daily**, **Weekly**, or **Monthly**.
4. Configure the **Schedule** options. Daily, Weekly, and Monthly each have different options to set the time and date at which the archive is run.

5. Click the **Schedule** button to schedule your archive job.



Austin / AustinScottDev / Backup & Archive / Create

Example Template Archive Scheduled

Cancel Schedule

✓ Select Type ———— ✓ Select Template ———— ✓ Finish Setup

Schedule Enabled ☒

Recurrence: Daily

Repeat every: 1 day(s)

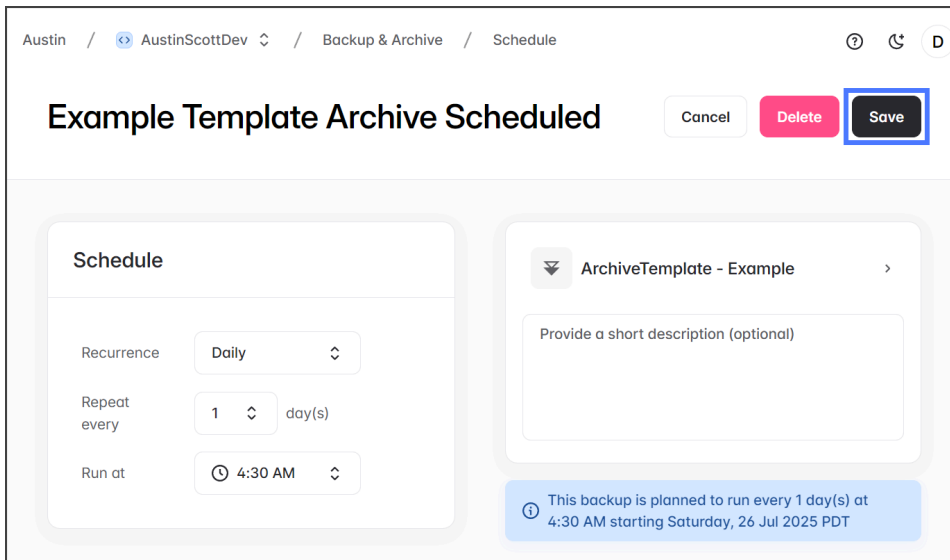
Run at: 4:30 AM

ArchiveTemplate - Example

Provide a short description (optional)

This backup is planned to run every 1 day(s) at 4:30 AM starting Saturday, 26 Jul 2025 PDT

6. Confirm the schedule is correct and click **Save**.



Austin / AustinScottDev / Backup & Archive / Schedule

Example Template Archive Scheduled

Cancel Delete Save

Schedule

Recurrence: Daily

Repeat every: 1 day(s)

Run at: 4:30 AM

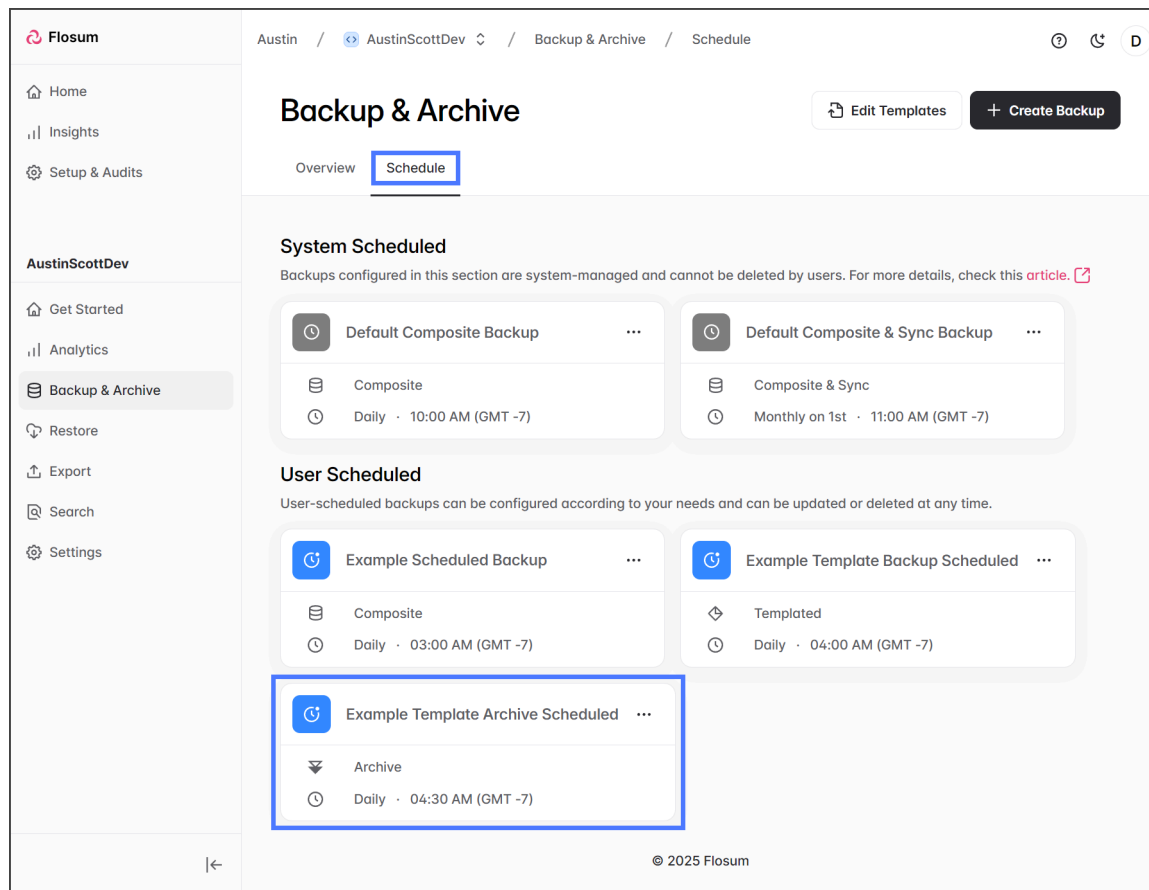
ArchiveTemplate - Example

Provide a short description (optional)

This backup is planned to run every 1 day(s) at 4:30 AM starting Saturday, 26 Jul 2025 PDT

View your Scheduled Archive Jobs

All scheduled archives for the selected Org will appear on the **Schedule** tab of the **Backup & Archive** section. Any scheduled archives you have created will be found in the **User Scheduled** section.



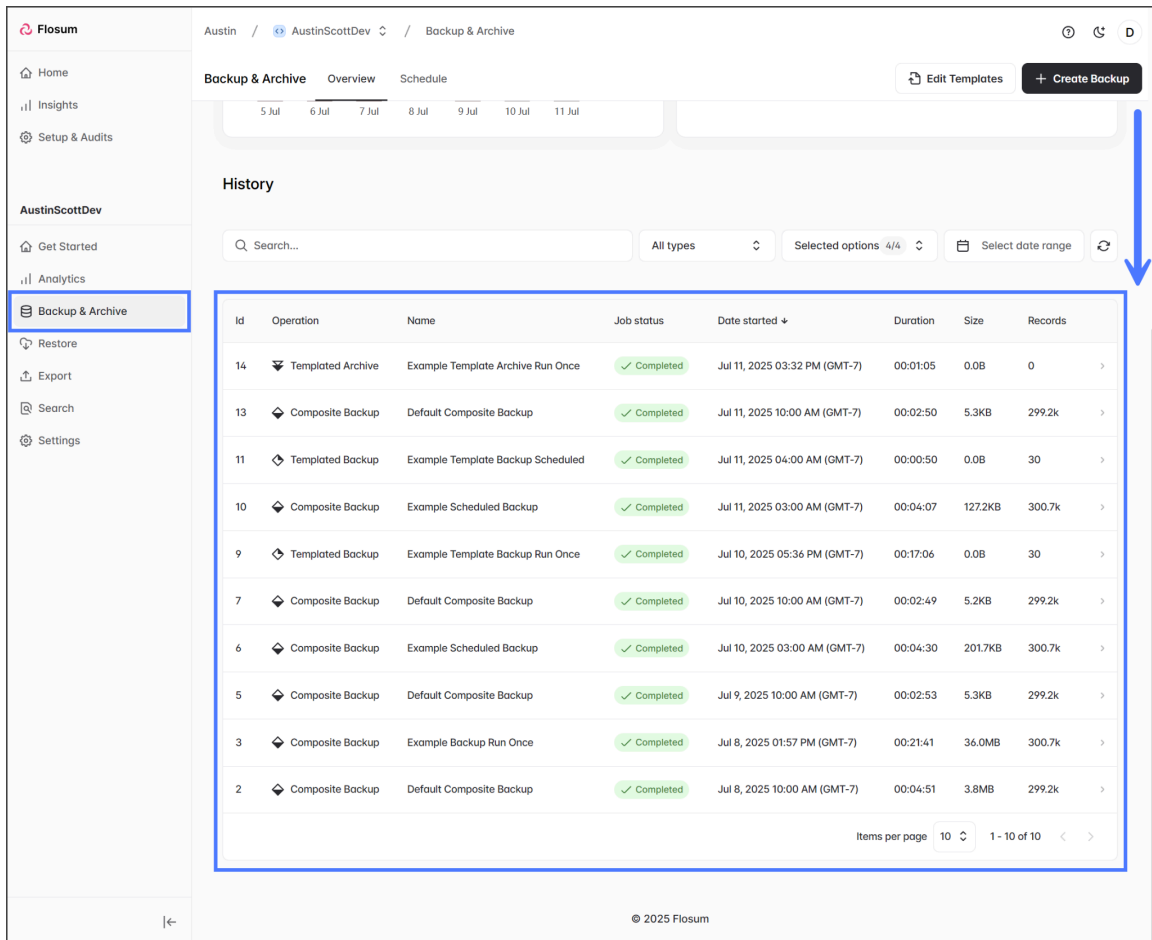
The screenshot shows the Flosum web interface. On the left is a sidebar with navigation links: Home, Insights, Setup & Audits, AustinScottDev (selected), Get Started, Analytics, Backup & Archive (highlighted), Restore, Export, Search, and Settings. The main header shows the breadcrumb: Austin / AustinScottDev / Backup & Archive / Schedule. The 'Schedule' tab is selected and highlighted with a blue box. The page title is 'Backup & Archive' with buttons for 'Edit Templates' and 'Create Backup'. Below the title are two tabs: 'Overview' and 'Schedule' (selected). The content is divided into two sections: 'System Scheduled' and 'User Scheduled'. The 'System Scheduled' section contains two cards: 'Default Composite Backup' (Daily at 10:00 AM) and 'Default Composite & Sync Backup' (Monthly on 1st at 11:00 AM). The 'User Scheduled' section contains three cards: 'Example Scheduled Backup' (Daily at 03:00 AM), 'Example Template Backup Scheduled' (Daily at 04:00 AM), and 'Example Template Archive Scheduled' (Daily at 04:30 AM). The 'Example Template Archive Scheduled' card is highlighted with a blue box. The footer shows a copyright notice: © 2025 Flosum.

Monitor Backup & Archive Jobs

You can view all active and finished backup and archive jobs for an organization. Clicking a finished job allows you to view details about the job, including the stored objects and records.

Job Status	Description
Success	The job was completed with no errors.
In Progress	The job is currently being processed or is pending processing.
Error	The job was completed with an error. See the logs to determine the cause.

1. From the **Home** page, select the **Org** to archive.
2. Click **Backup & Archive** from the sidebar menu.
3. Scroll down to the **History** section to view the jobs.



The screenshot shows the Flosum interface for monitoring backup and archive jobs. The left sidebar contains navigation links: Home, Insights, Setup & Audits, AustinScottDev (selected), Get Started, Analytics, Backup & Archive (highlighted), Restore, Export, Search, and Settings. The main content area is titled 'Backup & Archive' and includes tabs for Overview and Schedule. A 'History' section is visible, containing a search bar and a table of job history. A blue box highlights the History section, and a blue arrow points to the 'Create Backup' button in the top right corner.

Id	Operation	Name	Job status	Date started	Duration	Size	Records
14	Templated Archive	Example Template Archive Run Once	Completed	Jul 11, 2025 03:32 PM (GMT-7)	00:01:05	0.0B	0
13	Composite Backup	Default Composite Backup	Completed	Jul 11, 2025 10:00 AM (GMT-7)	00:02:50	5.3KB	299.2k
11	Templated Backup	Example Template Backup Scheduled	Completed	Jul 11, 2025 04:00 AM (GMT-7)	00:00:50	0.0B	30
10	Composite Backup	Example Scheduled Backup	Completed	Jul 11, 2025 03:00 AM (GMT-7)	00:04:07	127.2KB	300.7k
9	Templated Backup	Example Template Backup Run Once	Completed	Jul 10, 2025 05:36 PM (GMT-7)	00:17:06	0.0B	30
7	Composite Backup	Default Composite Backup	Completed	Jul 10, 2025 10:00 AM (GMT-7)	00:02:49	5.2KB	299.2k
6	Composite Backup	Example Scheduled Backup	Completed	Jul 10, 2025 03:00 AM (GMT-7)	00:04:30	201.7KB	300.7k
5	Composite Backup	Default Composite Backup	Completed	Jul 9, 2025 10:00 AM (GMT-7)	00:02:53	5.3KB	299.2k
3	Composite Backup	Example Backup Run Once	Completed	Jul 8, 2025 01:57 PM (GMT-7)	00:21:41	36.0MB	300.7k
2	Composite Backup	Default Composite Backup	Completed	Jul 8, 2025 10:00 AM (GMT-7)	00:04:51	3.8MB	299.2k

Items per page: 10 | 1 - 10 of 10

Restore Operations

Flosum restore operations allow you to retrieve data and files that have been deleted from your production environment.

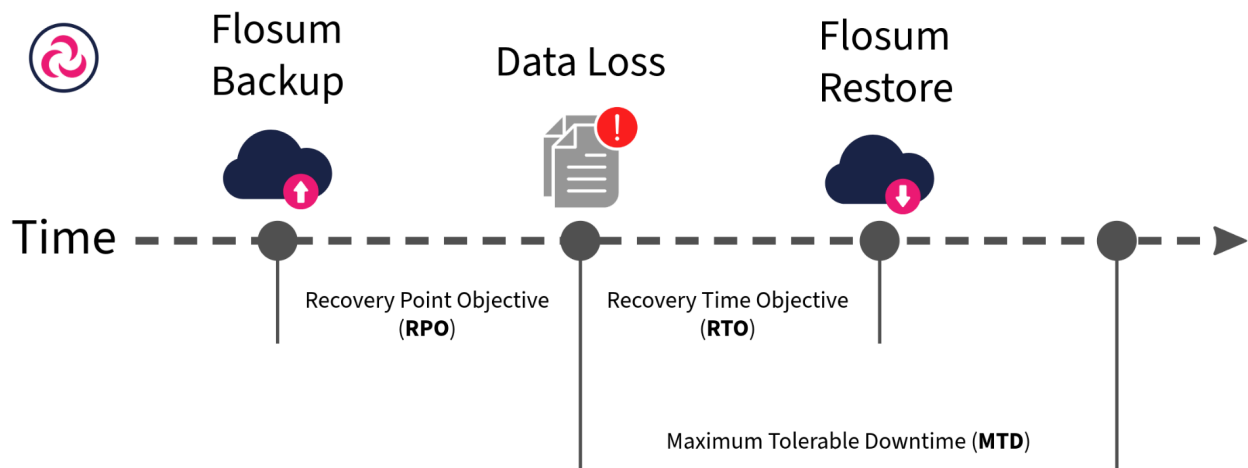
Overview

Restoring data in Salesforce can be complex, but Flosum Backup & Archive simplifies the process with a highly accurate, flexible, and visual restore workflow. Whether you're recovering from data corruption, user error, or a security incident, Flosum lets you:

- Restore from backups, archives, or metadata snapshots
- Filter what to restore by object, record, and field
- Visually compare record versions before confirming the restore
- Speed up recovery by restoring only what has changed

This article provides a high-level overview of how the restore process works and how to get started with Flosum's two-step backup and restore workflow.

Its strong filtering and comparison features allow you to restore only what's necessary, down to the object, record, or field level—minimizing risk and reducing Recovery Time Objectives (RTO).



Restore operations are a two-part process. First, you create a restore request that selects the objects and fields to retrieve, including using filters to choose the records that matter. The second step is to actually retrieve the data once the records to be retrieved have been validated.

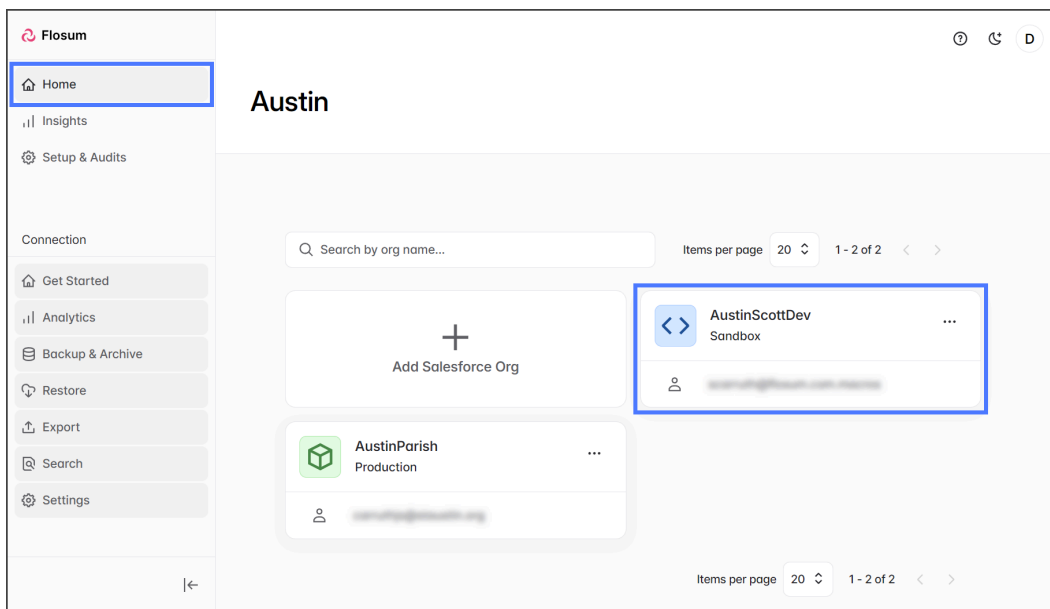
Create a Restore Job

Creating a restore job has several steps, as outlined below. A restore can be performed from several different data sources: **Backup**, **Archive**, and **Backup Metadata**. There are minor differences between each, but these instructions will focus on restoring from a **Backup**.

- [Select Restore Type](#)
- [Select Compromised and Correct Backups](#)
- [Select Objects to Restore](#)
- [Configure Object Settings](#)
- [Finish Restore Job Setup](#)

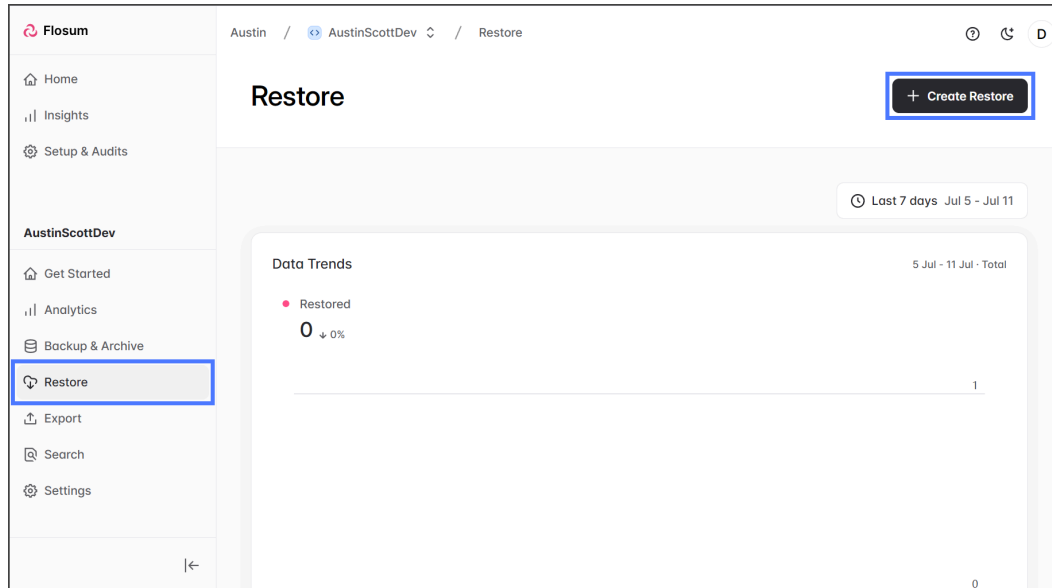
Select Restore Type

1. From the **Home** page, select the **Org** to archive.



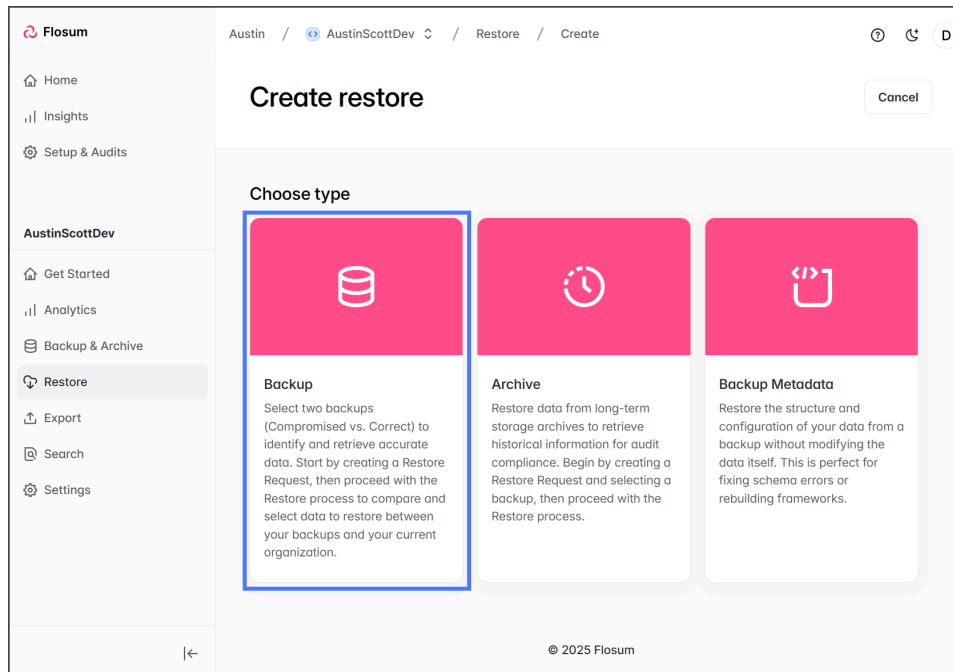
2. Click **Restore** from the sidebar menu.

3. Click **Create Restore**.



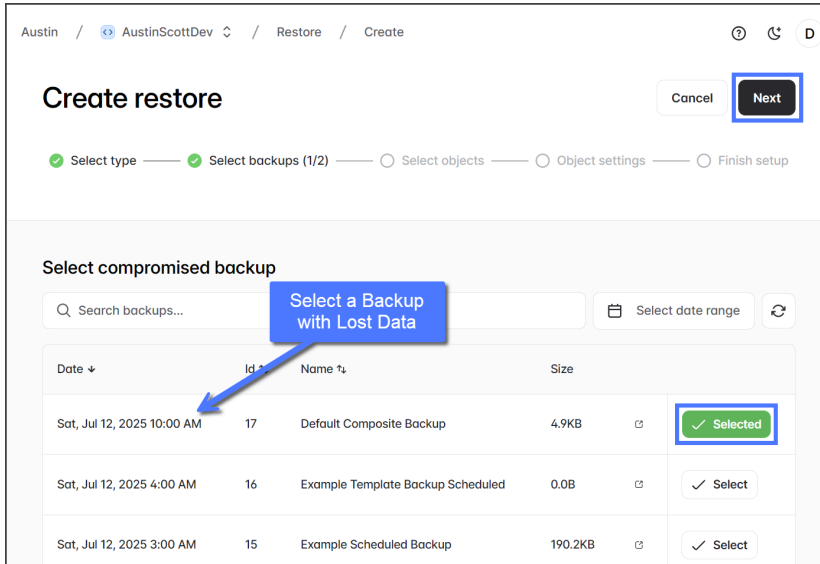
4. Click the restore **Type** for your purposes.

i These instructions use the **Backup** type as an example. Although there are minor differences between each restore type, you can still follow these instructions for the other types of restores.



Select Compromised and Correct Backups

1. Click **Select** for the **Compromised Backup**. This is the backup from which data was lost; this is your Recovery Point Objective.
2. Click **Next**.



Austin / AustinScottDev / Restore / Create

Create restore Cancel Next

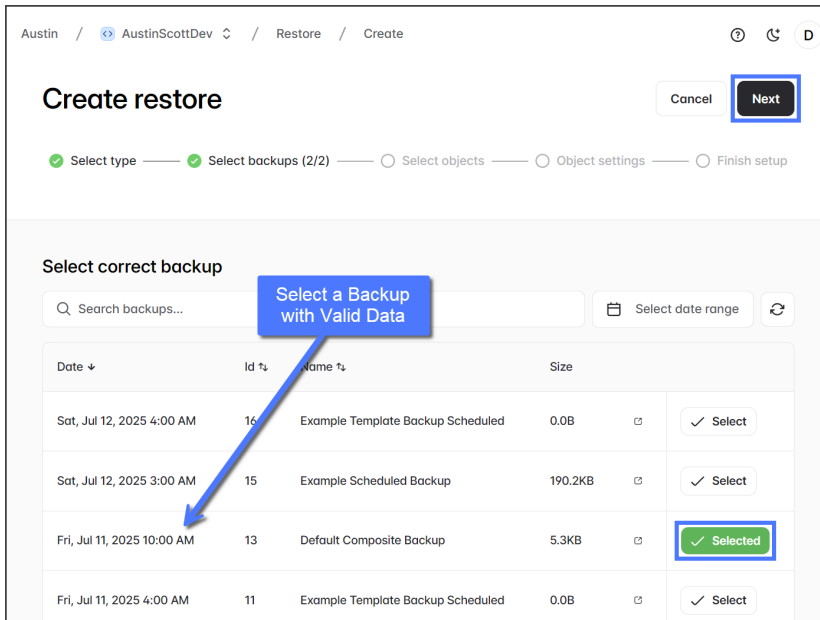
☒ Select type
 ☒ Select backups (1/2)
 ☐ Select objects
 ☐ Object settings
 ☐ Finish setup

Select compromised backup

Q Search backups... Select date range ↻

Date	Id	Name	Size		
Sat, Jul 12, 2025 10:00 AM	17	Default Composite Backup	4.9KB	☑	✓ Selected
Sat, Jul 12, 2025 4:00 AM	16	Example Template Backup Scheduled	0.0B	☑	✓ Select
Sat, Jul 12, 2025 3:00 AM	15	Example Scheduled Backup	190.2KB	☑	✓ Select

3. Click **Select** for the most recent successful **Correct Backup**. This is the backup with valid data before data loss (your Restoration Point).
4. Click **Next**.



Austin / AustinScottDev / Restore / Create

Create restore Cancel Next

☒ Select type
 ☒ Select backups (2/2)
 ☐ Select objects
 ☐ Object settings
 ☐ Finish setup

Select correct backup

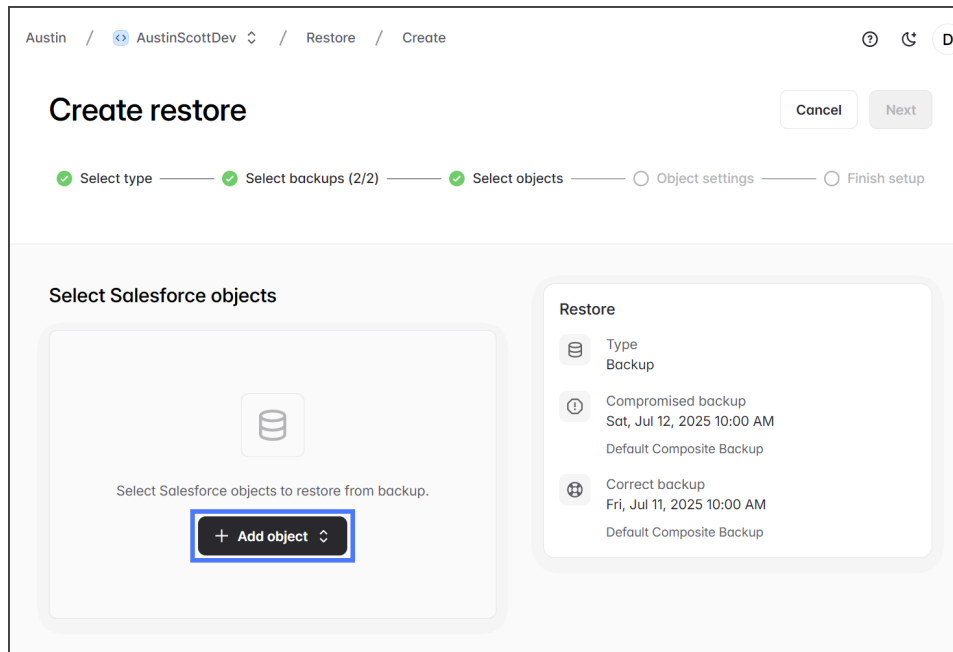
Q Search backups... Select date range ↻

Date	Id	Name	Size		
Sat, Jul 12, 2025 4:00 AM	16	Example Template Backup Scheduled	0.0B	☑	✓ Select
Sat, Jul 12, 2025 3:00 AM	15	Example Scheduled Backup	190.2KB	☑	✓ Select
Fri, Jul 11, 2025 10:00 AM	13	Default Composite Backup	5.3KB	☑	✓ Selected
Fri, Jul 11, 2025 4:00 AM	11	Example Template Backup Scheduled	0.0B	☑	✓ Select

Select Objects to Restore

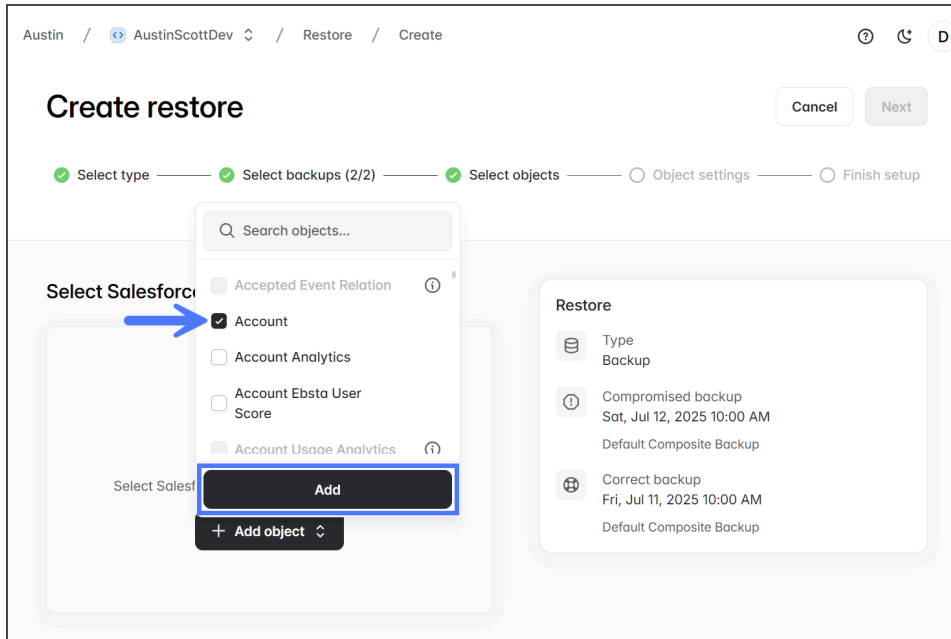
In this section, you select the objects you want to restore, their related child objects, filter on what records you want to restore, and which fields you want to retrieve.

1. Click the **Add Object** menu to choose which Salesforce objects to restore.



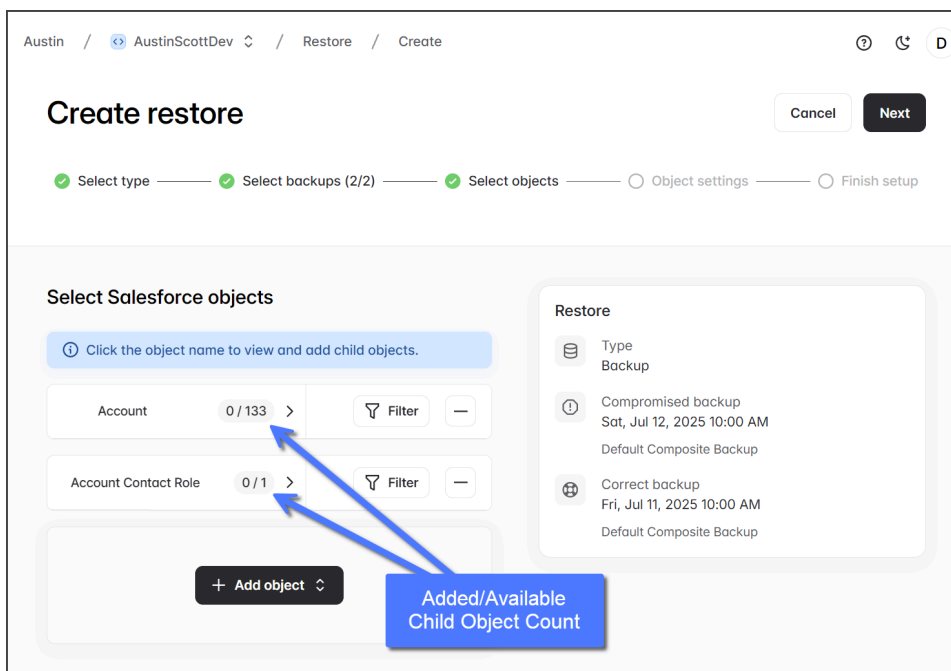
2. Search or browse for objects from the menu.
3. Check the objects you want to add.

- Click **Add** to add all of the selected objects.

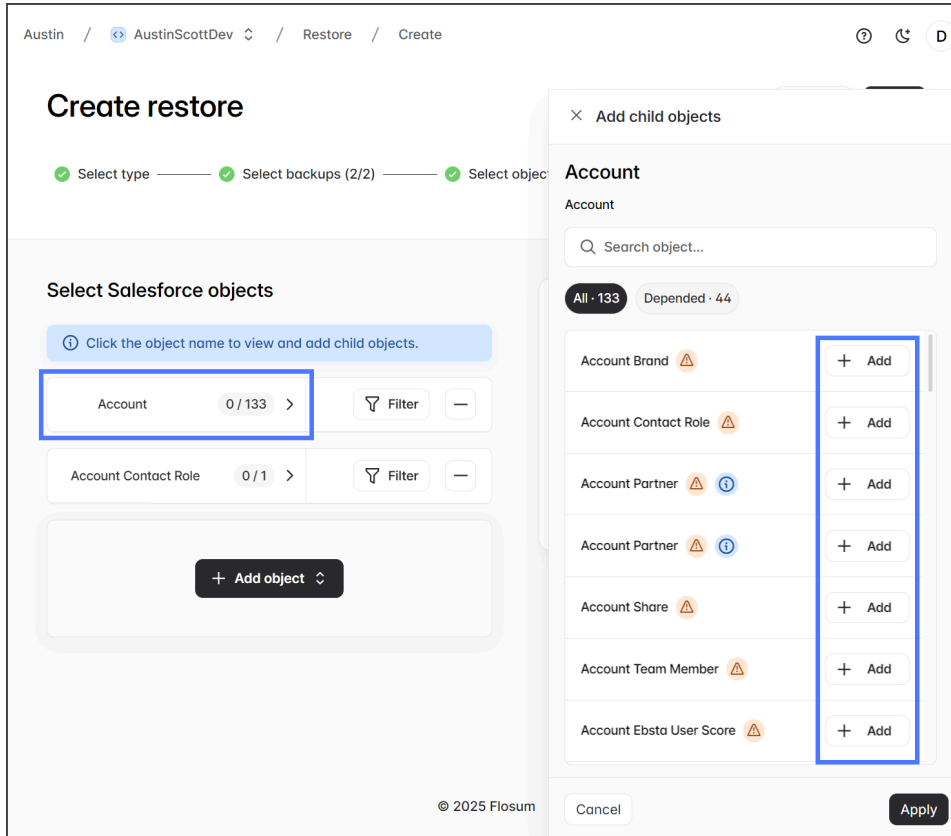


- When an object is added, you will need to add at least one child object to restore.

i To the right of the object's name is a count of **Added/Available** child objects. In the screenshot below, the **Account** object has **133** child objects, and **0** of them have been added.



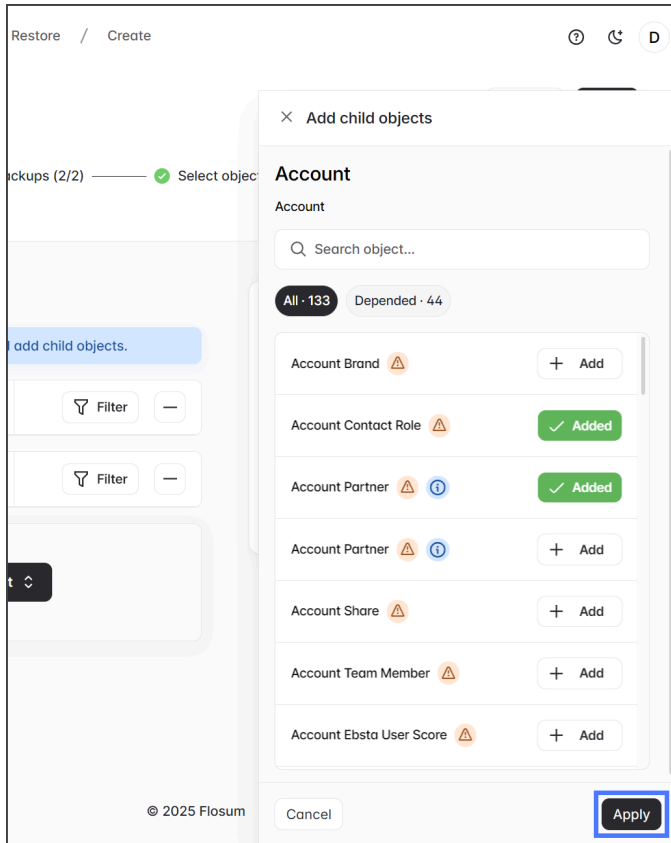
6. Click an object to open the **Add child objects** dialog.
7. Click the **+ Add** button next to each of the child objects to add.



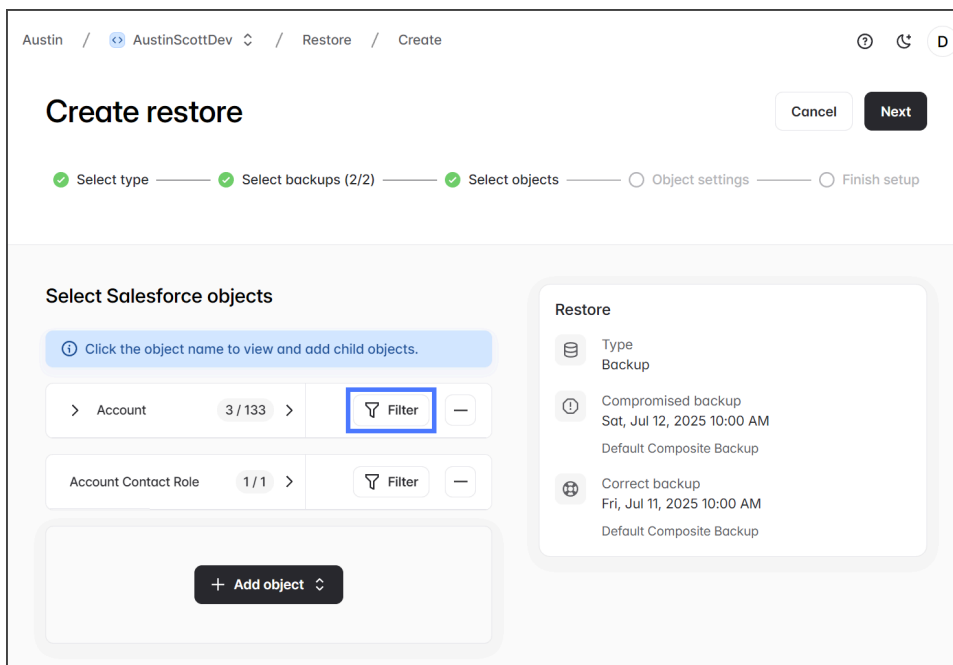
8. The **Caution** icon signifies that a child object is dependent on its parent object, and any child objects marked with this icon will lose data during a restore job if you do not add them to the job.

i The following explanation will help you understand the process of a restore operation. During this operation, the records intended for restoration are first deleted from Salesforce. This deletion initiates a cascading delete, which removes any dependent child records associated with those parent records. After this step, the records to be restored are added back into Salesforce. To successfully restore the data in the dependent child records, you must select each child object you wish to restore.

9. Once you have added all the objects, click **Apply** to save the changes.



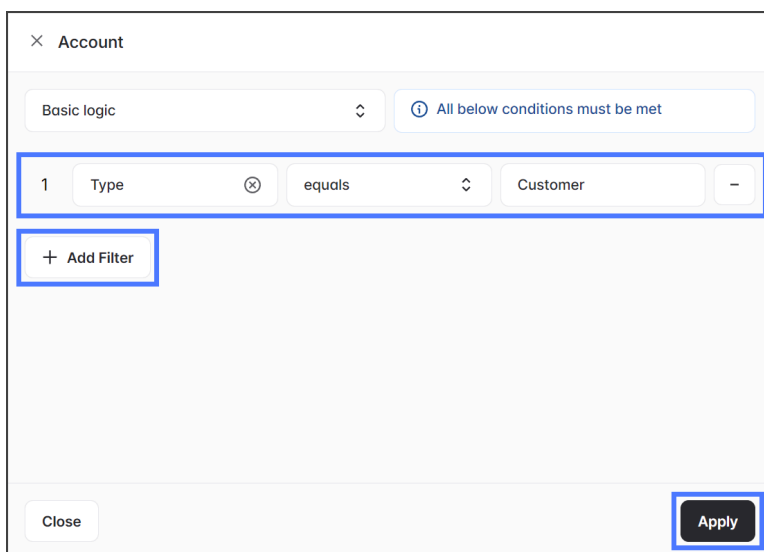
10. (Optional) Click **Filter** to add a filter to the object.



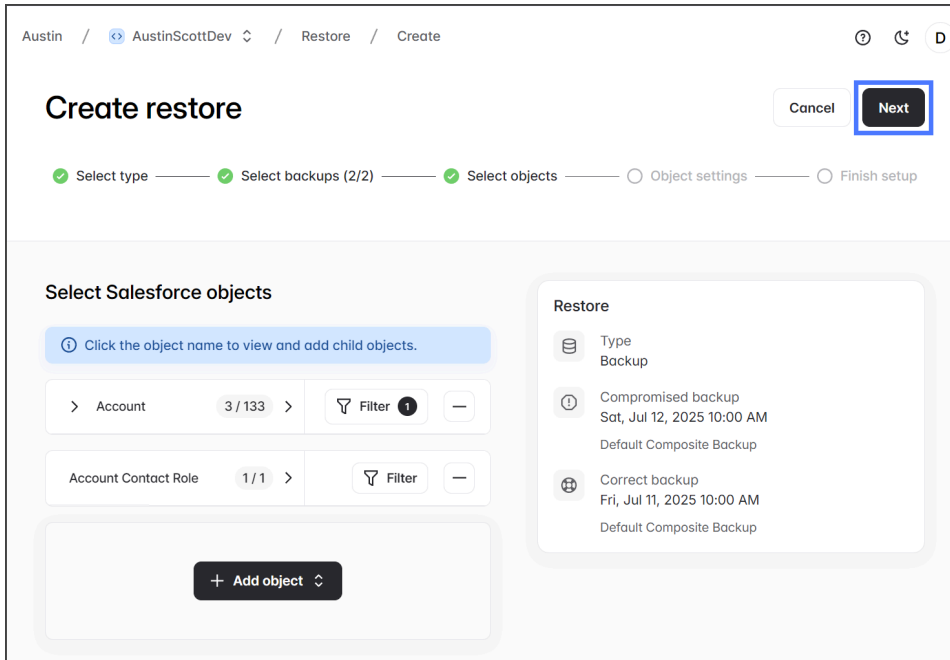
11. Click **Add Filter** in the filter dialog to add a filter criteria.

12. The screenshot below shows an example filter.

13. Click **Apply** to save the filter.



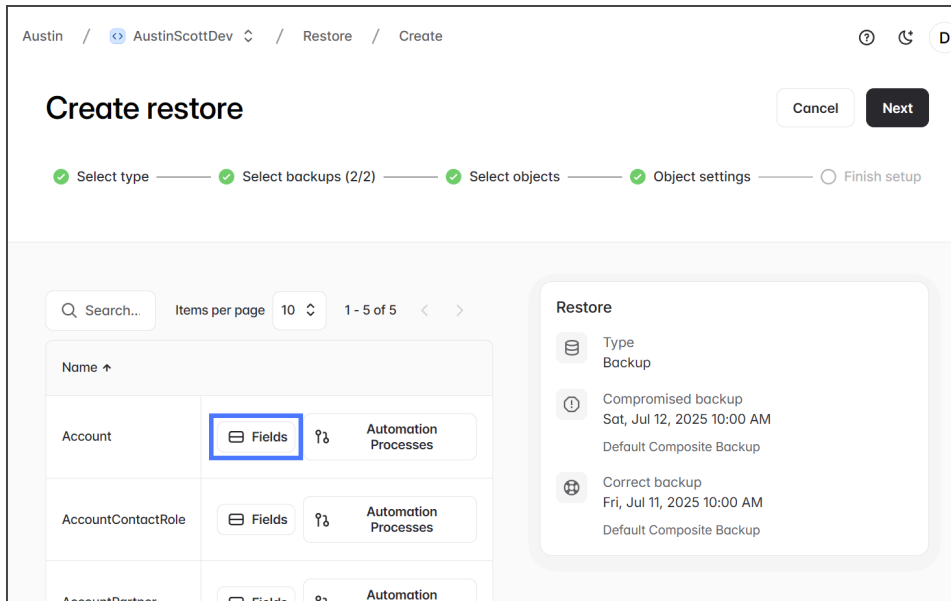
14. Once all the objects are selected and filtered, click **Next**.



Configure Object Settings

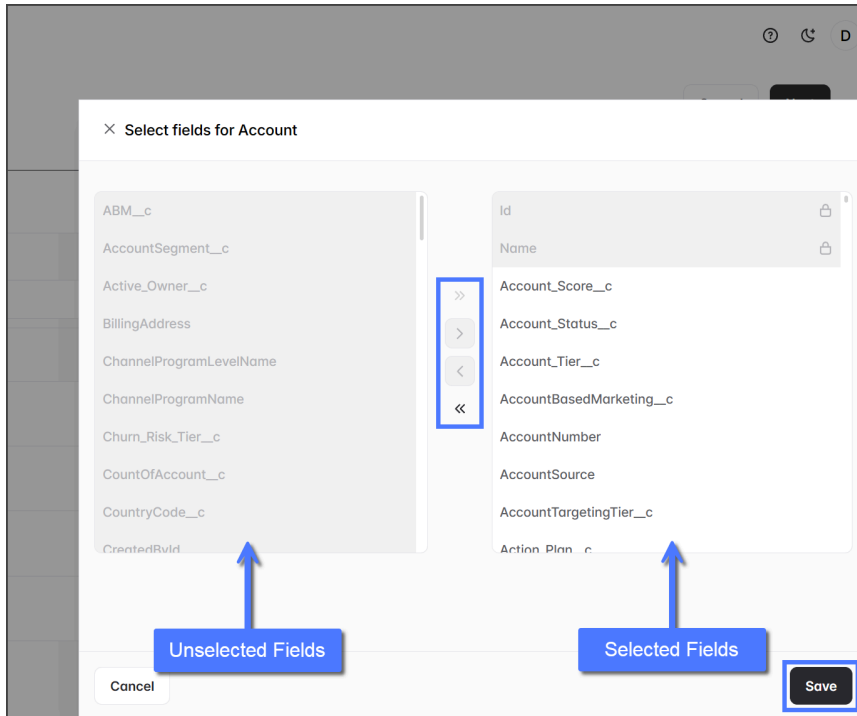
Object Settings allows you to select the **fields** to retrieve and the **automation processes** to suspend during the restore process.

1. Click the **Fields** button for an object to select the fields that will be restored for that object. This will open the **Select fields for Object** dialog.

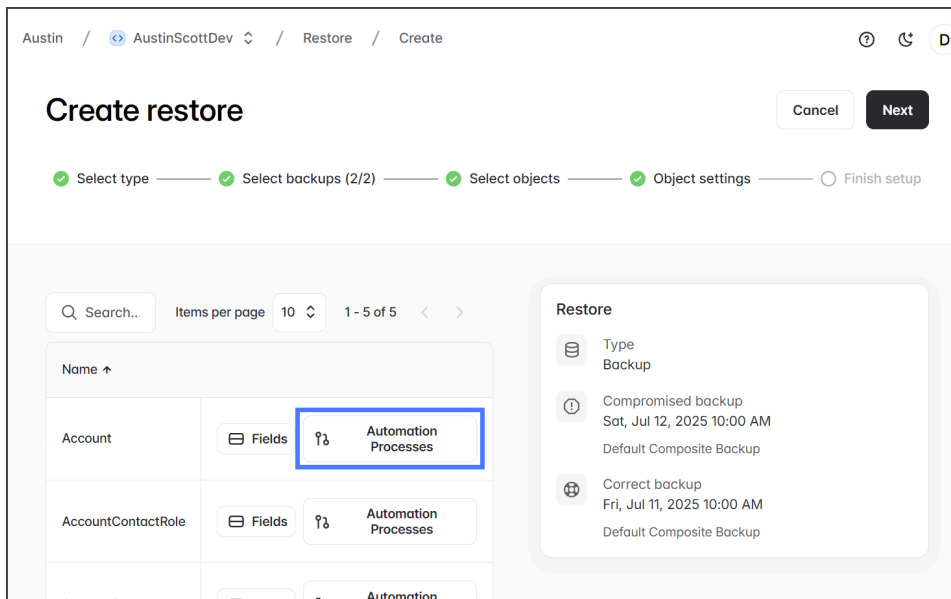


2. The **Select fields for Object** dialog contains two lists of fields. The right list shows all fields that are selected to be restored for the object, while the left list displays fields that are not selected. You can transfer fields between lists by selecting a field and clicking the arrows between them. Fields that are grey cannot be moved to the other list.

- Click **Save** once you have selected the desired fields.

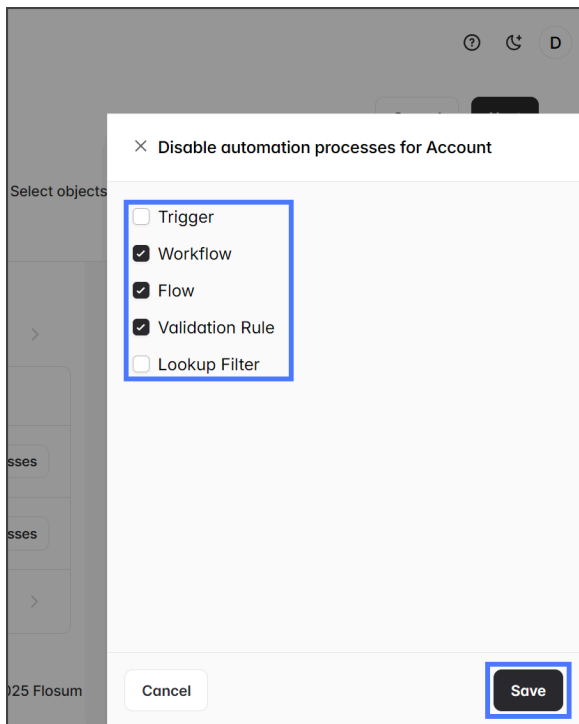


- Click the **Automation Processes** button for an object to select the processes to suspend during the restore. This will open the **Disable automation processes for Object** dialog.

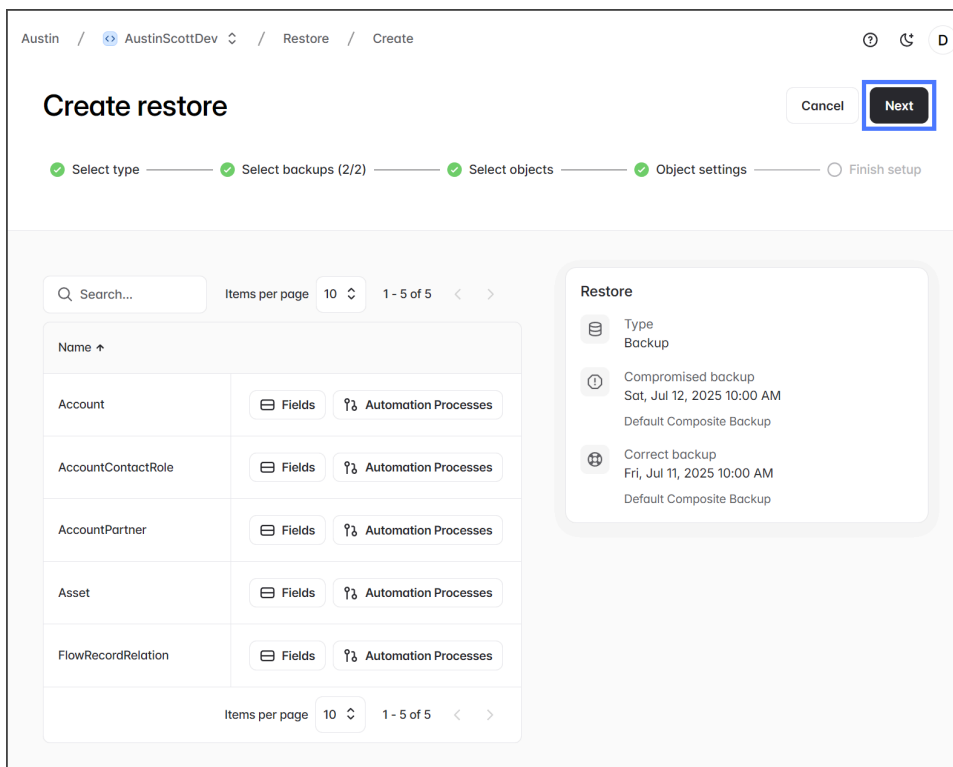


- Check the checkboxes for any of the processes you want to suspend during the restore.

6. Click **Save**.



7. Once all the object settings are complete, click **Next**.



Finish Restore Job Setup

1. Review the restore request to verify that the correct backups for **Compromised** and **Correct** are selected and that the proper objects, filters, and fields are added.
2. Click **Create Request** to initiate the restore preparation job.

i No data will be restored to Salesforce at this time. You must review the restored data and execute the restore job before the data is restored to Salesforce.

Austin / AustinScottDev / Restore / Create
ⓘ ⚙️ D

Cancel
Create request

✓ Select type — ✓ Select backups (2/2) — ✓ Select objects — ✓ Object settings — ✓ Finish setup

Selected objects

Objects	Filters & fields
	<div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;"> <div style="display: flex; justify-content: space-between;"> 1 Type equals Customer </div> </div>
	Id Name Account_Score__c Account_Status__c
	Account_Tier__c AccountBasedMarketing__c
	AccountNumber AccountSource
	AccountTargetingTier__c Action_Plan__c
	AE_Assigned__c Alexa_Rank__c
	All_Traffic_Sources__c AnnualRevenue AOV_Band__c
	AOV_Spend__c Architect__c AtRiskReason__c
	Attention__c BDR_Owner__c BDR_Rep_Assigned__c
	Best_Relationship__c Best_Relationship_Score__c
	BillingCity BillingCountry BillingCountryCode
	BillingGeocodeAccuracy BillingLatitude
	BillingLongitude BillingPostalCode BillingState
	BillingStateCode BillingStreet
	bizible2_Engagement_Score__c
	bombora_data_Average_Surge_Score_Summary__c
	bombora_data_Bombora_External_ID__c
	bombora_data_Exclude_from_Bombora_Surge__c
	bombora_data_Is_Created_by_Bombora__c
	bombora_data_Strongest_Cluster_Topic_Count__c

Restore

After creating the request, we'll retrieve data from your selected Salesforce objects. You can then review the records before proceeding with the restore.

ⓘ Type Backup

ⓘ Compromised backup
Sat, Jul 12, 2025 10:00 AM
Default Composite Backup

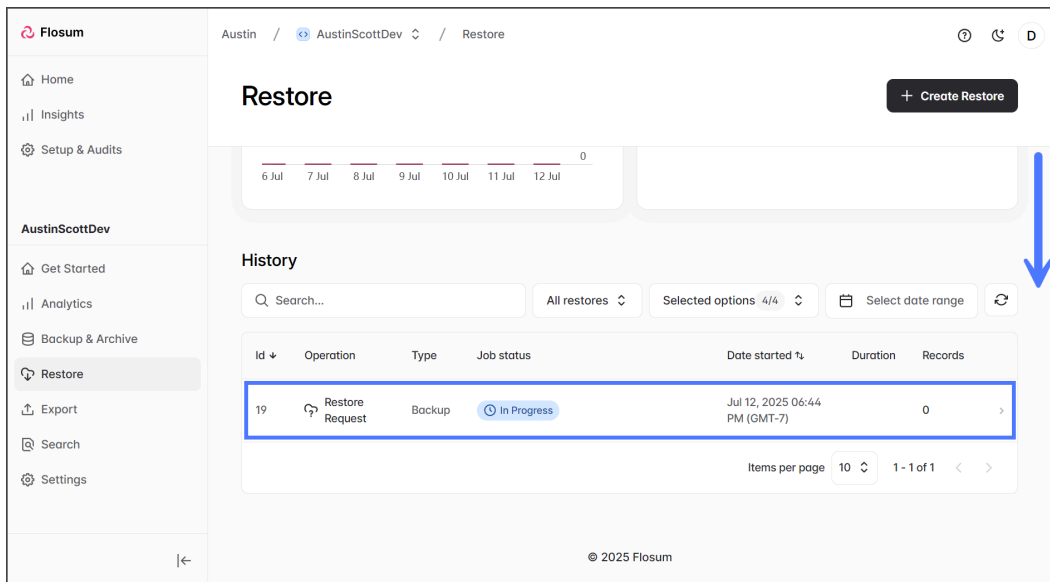
←

ⓘ Correct backup
Fri, Jul 11, 2025 10:00 AM
Default Composite Backup

←

3. The restore request will begin processing.

4. Scroll down to the **History** table to view the status of the **Restore Request**.



The screenshot shows the Flosum web interface. On the left is a sidebar with navigation links: Home, Insights, Setup & Audits, AustinScottDev (selected), Get Started, Analytics, Backup & Archive, Restore (highlighted), Export, Search, and Settings. The main content area is titled 'Restore' and includes a '+ Create Restore' button. Below this is a 'History' section with a search bar, filters for 'All restores' and 'Selected options 4/4', and a 'Select date range' button. A table lists restore operations with columns: Id, Operation, Type, Job status, Date started, Duration, and Records. One entry is highlighted with a blue box: Id 19, Operation 'Restore Request', Type 'Backup', Job status 'In Progress', Date started 'Jul 12, 2025 06:44 PM (GMT-7)', Duration '0', and Records '0'. A blue arrow on the right points downwards towards the History table.

Id	Operation	Type	Job status	Date started	Duration	Records
19	Restore Request	Backup	In Progress	Jul 12, 2025 06:44 PM (GMT-7)	0	0


Execute a Restore Job

The second part of the restore process involves reviewing the data retrieved from the Restore Request to ensure the correct data will be restored. If the Restore Request contains valid data, you can proceed to restore it to your selected Salesforce organization.

Select Restore Request

1. Scroll down to the **History** table on the **Restore** page to view all of the completed Restore Request jobs.
2. Click a **Restore Request** job that is marked as **Ready for restore**.








i Only **Restore Requests** that have one or more **Records** will be marked as **Ready for restore**.

Austin /  AustinScottDev / Restore
🔍 ⌂ D

Restore
+ Create Restore

History

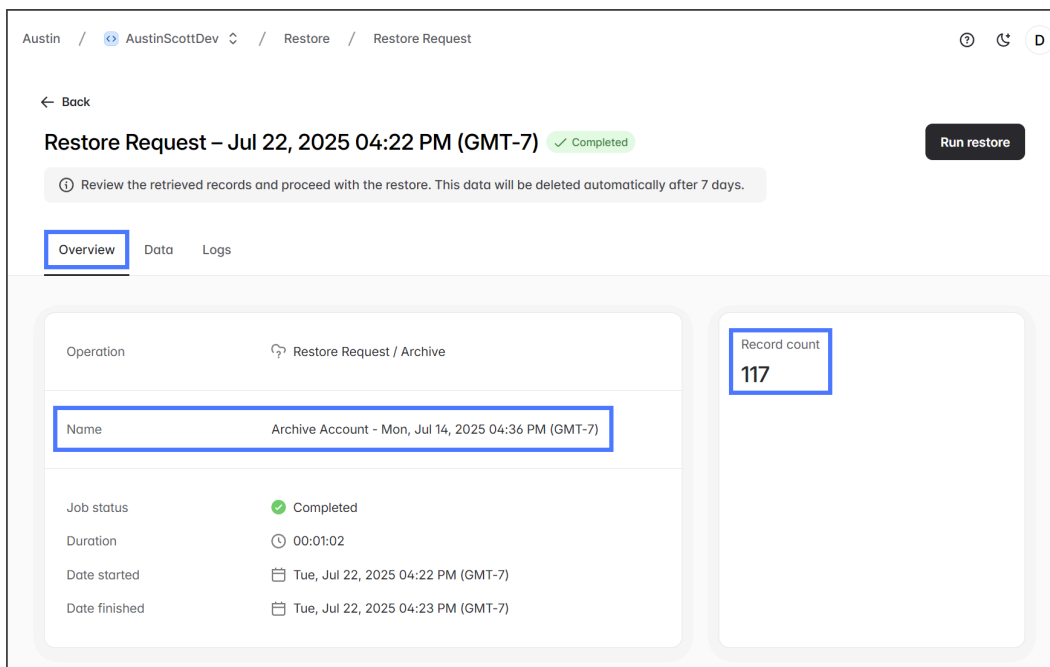
Search...
All restores
Selected options 4/4
Select date range

Id	Operation	Type	Job status	Date started	Duration	Records
88	 Restore Request	Archive	 Completed  Ready for restore	Jul 22, 2025 04:22 PM (GMT-7)	00:01:02	117
78	 Restore Request	Backup	 Completed	Jul 20, 2025 07:00 PM (GMT-7)	00:01:01	0
77	 Restore Request	Backup	 Completed	Jul 20, 2025 06:52 PM (GMT-7)	00:01:02	0

Review Restore Request

Before restoring data, it is recommended to review the request and the data to be restored.

1. Review the information on the **Overview** tab to verify that the data source and the number of records to restore are correct.



Austin / AustinScottDev / Restore / Restore Request

← Back

Restore Request – Jul 22, 2025 04:22 PM (GMT-7) ✓ Completed Run restore

① Review the retrieved records and proceed with the restore. This data will be deleted automatically after 7 days.

Overview Data Logs

Operation Restore Request / Archive

Name Archive Account - Mon, Jul 14, 2025 04:36 PM (GMT-7)

Job status ✓ Completed

Duration ⌚ 00:01:02

Date started 📅 Tue, Jul 22, 2025 04:22 PM (GMT-7)

Date finished 📅 Tue, Jul 22, 2025 04:23 PM (GMT-7)

Record count
117

2. Click the **Data** tab to view the data to be restored.

3. Click an object to view the records for that object.

Austin / AustinScottDev / Restore / Restore Request / Objects

← Back

Restore Request – Jul 22, 2025 04:22 PM (GMT-7) ✓ Completed Run restore

① Review the retrieved records and proceed with the restore. This data will be deleted automatically after 7 days.

Overview **Data** Logs

Q Search objects...

Object ↕	Record count ↓
Total	117
Customer_Health_Score__c	115
Account	1
Case	1
AuthorizationFormConsent	0
ChannelProgramMember	0

4. Click a record to view the fields for the record.

Austin / AustinScottDev / Restore / Restore Request / Objects / Customer Health Score C

← Back

Customer_Health_Score__c Run restore

Restore Request – Jul 22, 2025 04:22 PM (GMT-7) >

API Name: Customer_Health_Score__c

Record count: 115

See filters See fields See automations

Q Search records...

Id ↕	Name ↕	Owner	Last modified ↕
a6UOu000000A8qjMAC	CHS-00120		Jul 14, 2025 05:00 AM (GMT-7)
a6UOu00000009izVMAQ	CHS-00116		Jul 11, 2025 05:00 AM (GMT-7)
a6UOu00000009z13MAA	CHS-00118		Jul 13, 2025 05:00 AM (GMT-7)

5. Review the field data to ensure the correct records are selected to restore.

Austin / AustinScottDev / Restore / Restore Request / Objects / Customer Health Score / A6uu000000a8qjmac ⓘ ⌂ D

← Back

α6UOu000000A8qjMAC

Run restore

Restore Request - Jul 22, 2025 04:22 PM (GMT-7) ⓘ

NameCHS-00120
Owner-
Last modifiedJul 14, 2025 05:00 AM (GMT-7)

Fields7

Fields

Search fields...

Correct backupJul 14, 2025 10:00 AM (GMT-7)
Default Composite Backup

Organization ⓘ

☐ Hide identical fields

<input type="radio"/> Record ID α6UOu000000A8qjMAC	<input type="radio"/>
<input type="radio"/> Owner ID 0051P000003FRfEQAW	<input type="radio"/>
<input type="radio"/> Churn Score 80	<input type="radio"/>
<input type="radio"/> Last Updated 2025-07-14	<input type="radio"/>

6. Click the **Logs** tab to view the Objects and Log for this restore request.

Austin / AustinScottDev / Restore / Restore Request / Logs

Back

Restore Request – Jul 22, 2025 04:22 PM (GMT-7) ✓ Completed

Review the retrieved records and proceed with the restore. This data will be deleted automatically after 7 days.

Overview Data **Logs**

Download Refresh

Total

11

Queued

0

In Progress

0

Exception

0

Completed

11

Search objects...

#	Object ↑	Records	Status
1	Account	1	✓ Completed
2	AuthorizationFormConsent	0	✓ Completed
3	Case	1	✓ Completed
4	ChannelProgramMember	0	✓ Completed
5	CommSubscriptionConsent	0	✓ Completed
6	Contract	0	✓ Completed

[7/22/2025, 11:23:02 PM] [info] Job started

[7/22/2025, 11:23:04 PM] [info] Source type: archive

[7/22/2025, 11:23:04 PM] [info] Correct backup name: Archive Account

[7/22/2025, 11:23:04 PM] [info] Account Start prepare

[7/22/2025, 11:23:04 PM] [info] Account Finish prepare

[7/22/2025, 11:23:04 PM] [info] AuthorizationFormConsent Start prepare

[7/22/2025, 11:23:04 PM] [info] AuthorizationFormConsent Finish prepare

[7/22/2025, 11:23:04 PM] [info] Case Start prepare

[7/22/2025, 11:23:04 PM] [info] Case Finish prepare

[7/22/2025, 11:23:04 PM] [info] ChannelProgramMember Start prepare

[7/22/2025, 11:23:04 PM] [info] ChannelProgramMember Finish prepare

[7/22/2025, 11:23:04 PM] [info] CommSubscriptionConsent Start prepare

[7/22/2025, 11:23:04 PM] [info] CommSubscriptionConsent Finish prepare

[7/22/2025, 11:23:04 PM] [info] Contract Start prepare

[7/22/2025, 11:23:04 PM] [info] Contract Finish prepare

[7/22/2025, 11:23:04 PM] [info] Customer_Health_Score__c Start prepare

[7/22/2025, 11:23:04 PM] [info] Customer_Health_Score__c Finish prepare

[7/22/2025, 11:23:04 PM] [info] Entitlement Start prepare

[7/22/2025, 11:23:04 PM] [info] Entitlement Finish prepare

[7/22/2025, 11:23:04 PM] [info] Order Start prepare

[7/22/2025, 11:23:04 PM] [info] Order Finish prepare

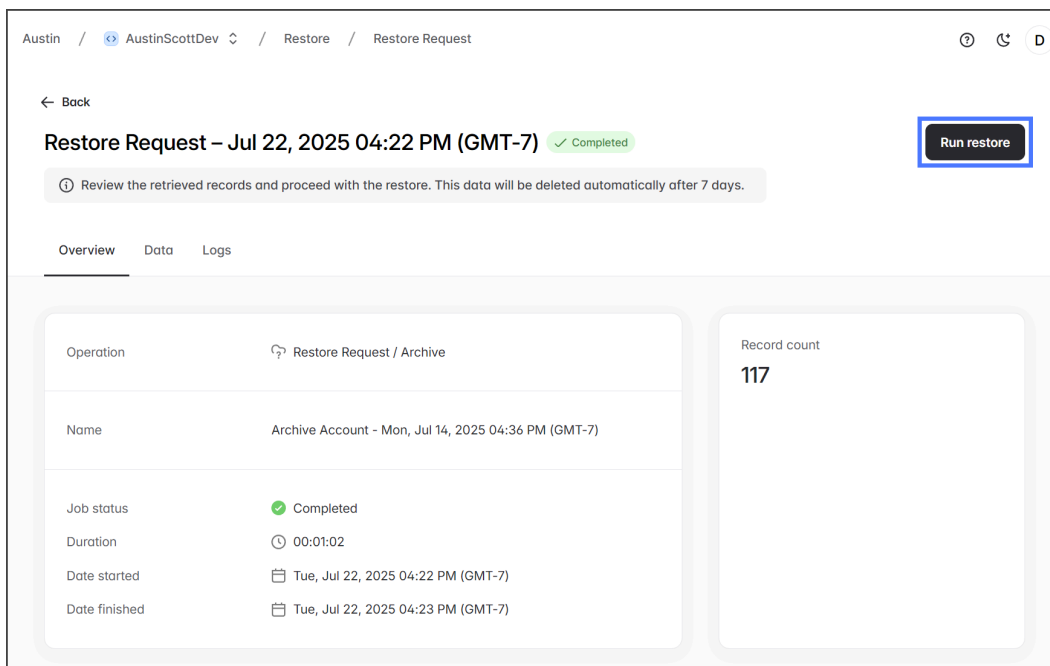
© Flosum 2025

95

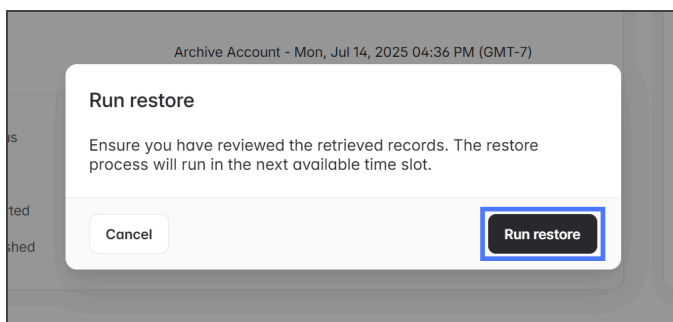
Run Restore

Once you're satisfied with the data to restore, you can proceed to run the **Restore**.

1. Click **Run restore**.



2. Click **Run restore** on the **Run restore** confirmation dialog box.



3. Scroll down to the **History** table to view the status of the Restore Job.

Austin / AustinScottDev / Restore

Restore + Create Restore

History

Search... All restores Selected options: 4/4 Select date range

Id	Operation	Type	Job status	Date started	Duration	Records
89	Restore	Archive	In Progress	Jul 22, 2025 05:13 PM (GMT-7)		0
88	Restore Request	Archive	Completed Ready for restore	Jul 22, 2025 04:22 PM (GMT-7)	00:01:02	117
78	Restore Request	Backup	Completed	Jul 20, 2025 07:00 PM (GMT-7)	00:01:01	0

4. Once the **Restore** is complete, you can view the restored data in your Salesforce organization.

Austin / AustinScottDev / Restore

Restore + Create Restore

History

Search... All restores Selected options: 4/4 Select date range

Id	Operation	Type	Job status	Date started	Duration	Records
89	Restore	Archive	Completed	Jul 22, 2025 05:13 PM (GMT-7)	00:03:51	117
88	Restore Request	Archive	Completed Ready for restore	Jul 22, 2025 04:22 PM (GMT-7)	00:01:02	117
78	Restore Request	Backup	Completed	Jul 20, 2025 07:00 PM (GMT-7)	00:01:01	0

Data Restored to Salesforce

View, Compare, and Restore Data from within Salesforce

Prerequisites

Follow the instructions in the [Setting up Backup & Archive Salesforce Application](#) article to configure the **Flosum Backup & Archive** managed package in your Salesforce org.

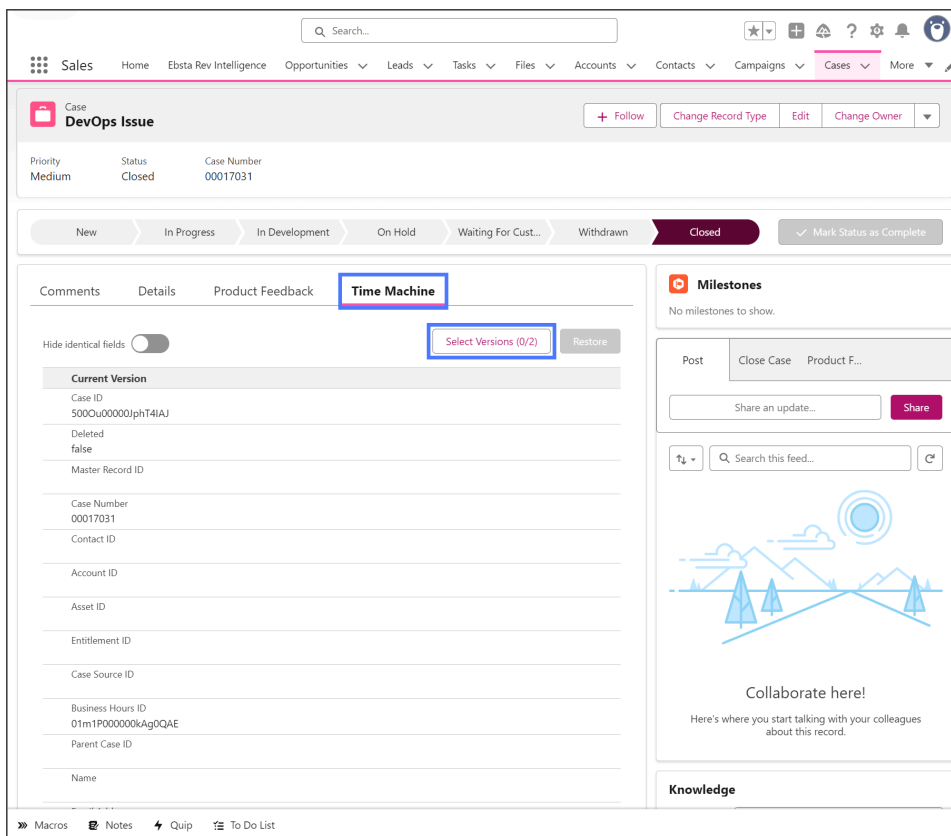
View and Compare

Once you have added the **Time Machine** Lightning Web Component to your selected objects (i.e., Account, Case, etc.) on Lightning Web Pages, you can compare and restore previous versions of a record.

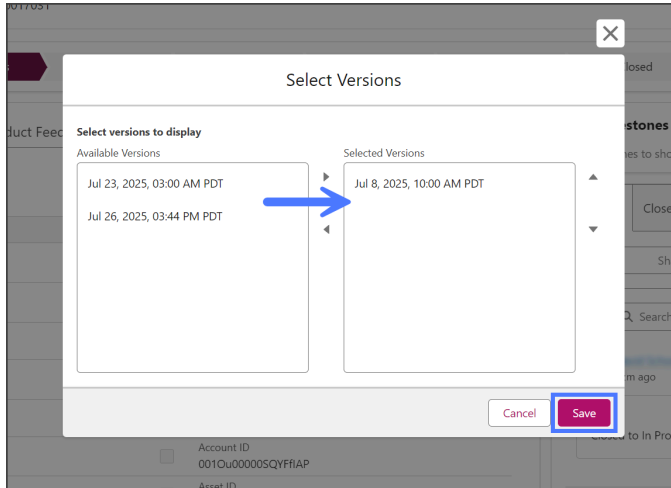
1. Open a Salesforce record (e.g., **Case**).
2. Click the **Time Machine** tab.

i You need to add the **Flosum Time Machine** component to a record's page before using this feature. See the instructions above to add the component.


3. Click **Select Versions**.

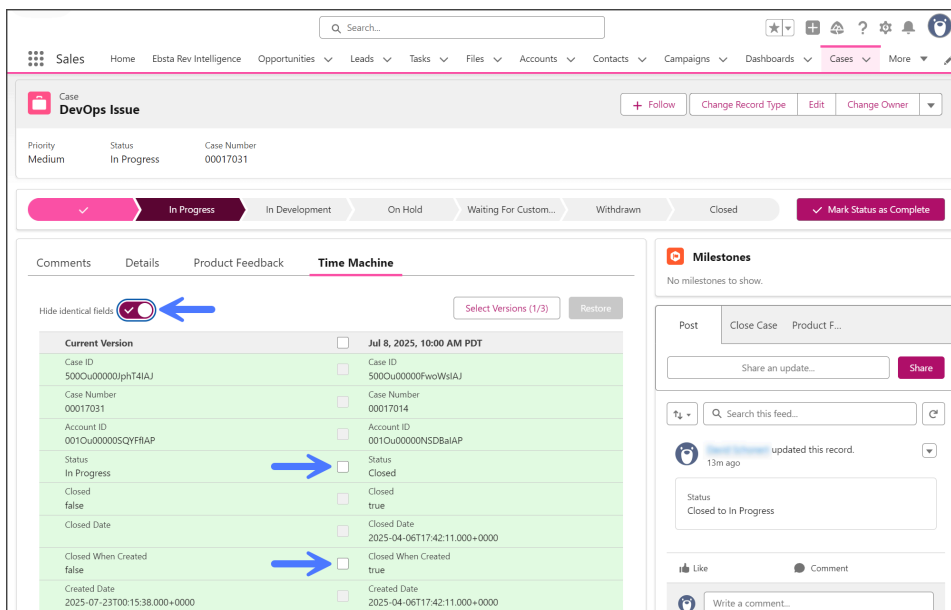


4. Add up to 4 versions from the **Available Versions** list to the **Selected Versions** list.
5. Click **Save**.

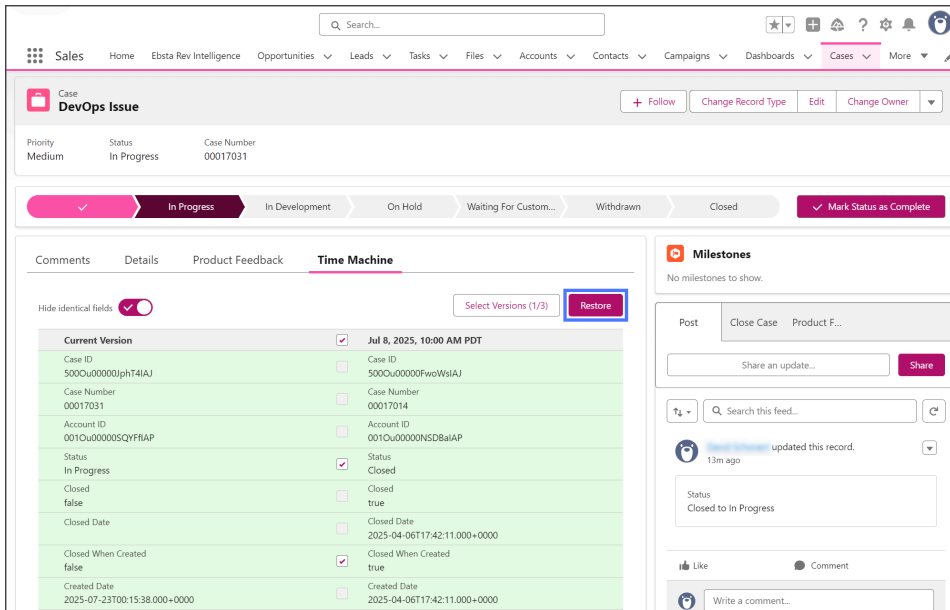


6. Compare the **Current Version** to all of the **Selected Versions**.
7. (Optional) Enable the **Hide identical fields** toggle to only show fields that have changed.
8. Select the fields to restore.

 Only non-reference fields (not lookup fields) can be restored. The fields with the greyed-out checkbox are unavailable for restoration.



9. Click **Restore**.



The screenshot shows the Flosum interface for a 'Case DevOps Issue'. The 'Time Machine' tab is active, displaying a table of versions. The 'Restore' button is highlighted in the top right of the table.

Current Version	Jul 8, 2025, 10:00 AM PDT
Case ID 500Ou0000jphT4IAJ	Case ID 500Ou0000FwoWsdAJ
Case Number 00017031	Case Number 00017014
Account ID 001Ou00000S2YFRAP	Account ID 001Ou00000NSDBaiAP
Status In Progress	Status Closed
Closed false	Closed true
Closed Date	Closed Date 2025-04-06T17:42:11.000+0000
Closed When Created false	Closed When Created true
Created Date 2025-07-23T00:15:38.000+0000	Created Date 2025-04-06T17:42:11.000+0000

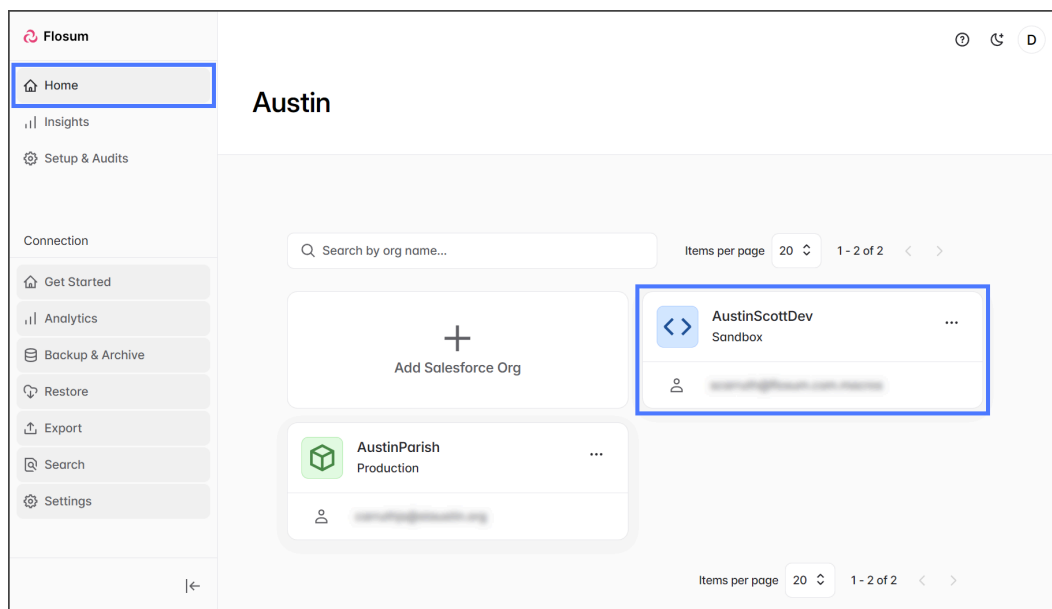
10. After the fields have been restored, you will see a **Record restored successfully** message.

Export Operations

The Export to CSV feature in the Backup & Archive app enables you to export data from backups or archives into CSV files for external analysis or reporting purposes. You can export full or filtered datasets and download the results in a .zip file format.

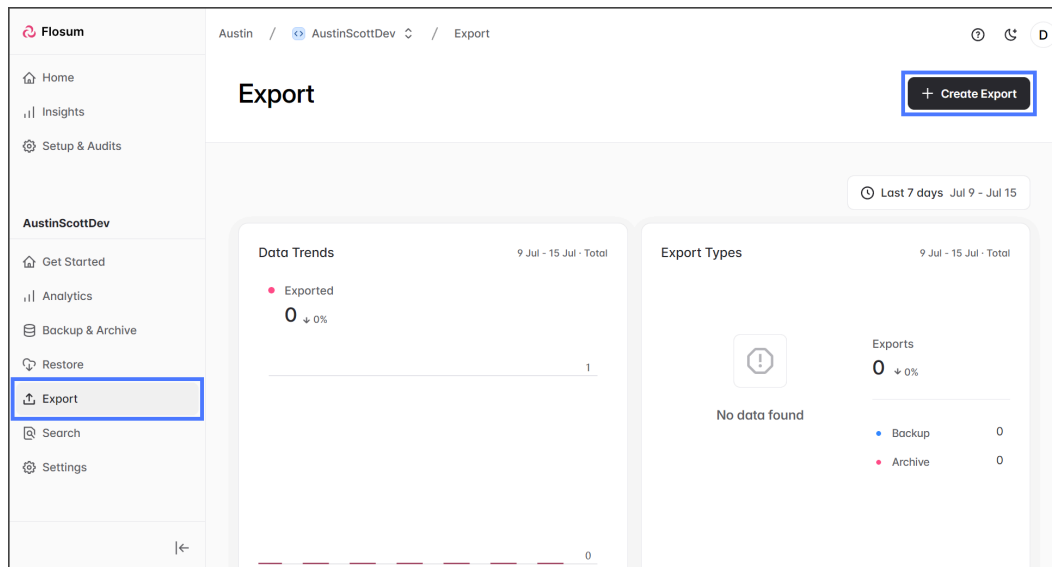
Create Export

1. From the **Home** page, select the **Org** to export.

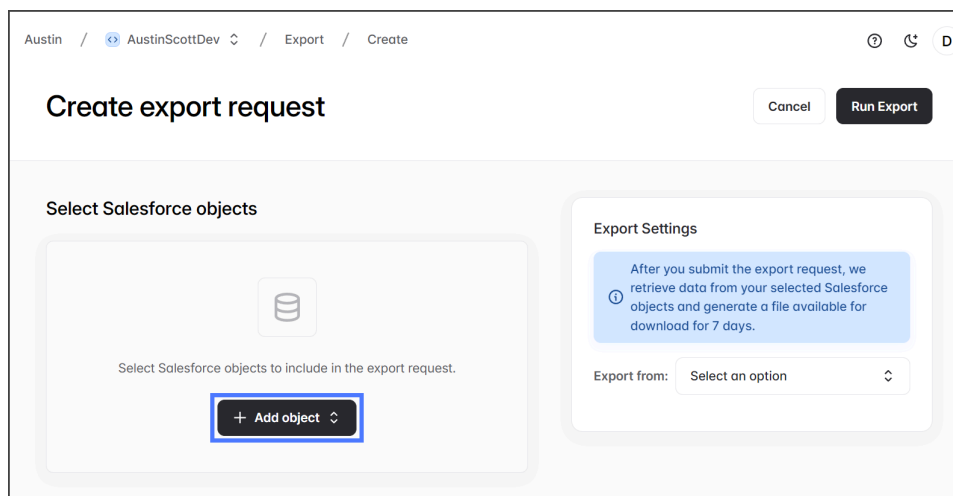


2. Click **Export** from the sidebar menu.

3. Click **Create Export**.



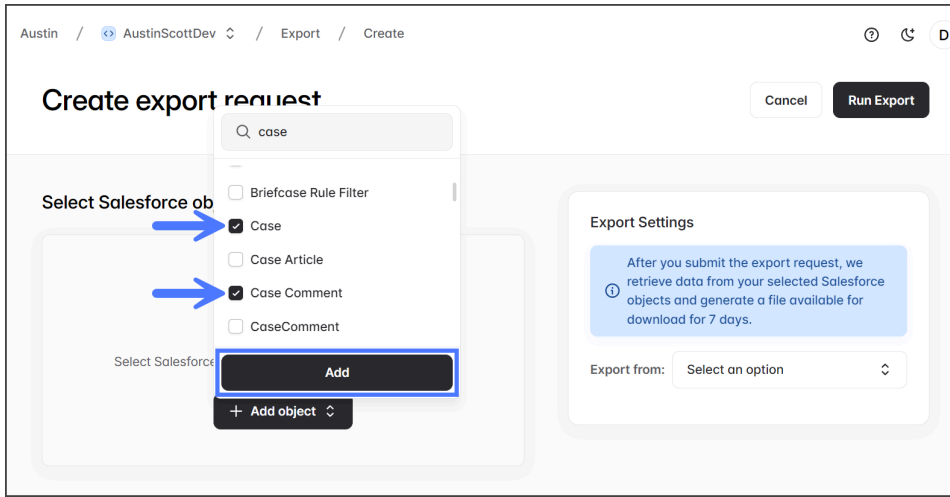
4. Click the **Add object** menu button to select the Salesforce Objects to include in the export.



5. Search or browse for objects from the menu.

6. Check the objects you want to add.

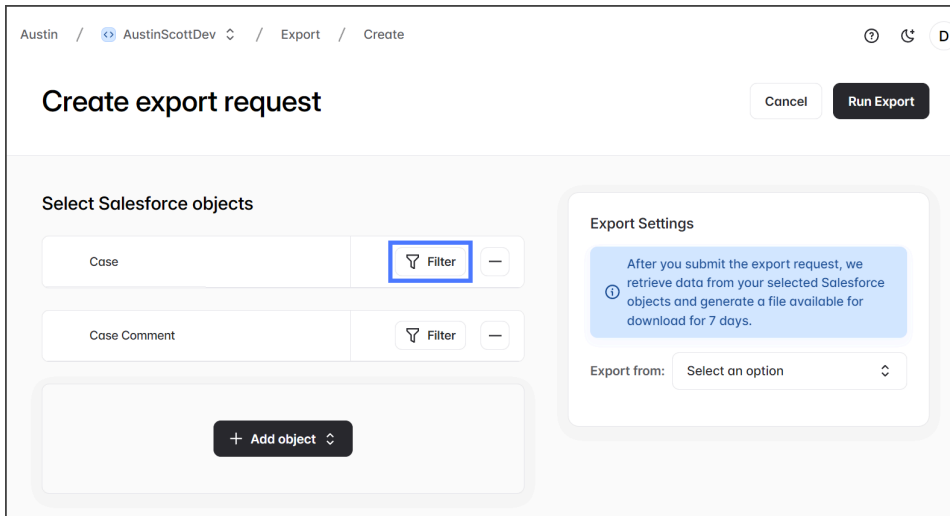
- Click **Add** to add all of the selected objects.



The screenshot shows the 'Create export request' form. The 'Select Salesforce objects' dropdown menu is open, showing a search bar with 'case' and a list of objects: 'Briefcase Rule Filter', 'Case' (checked), 'Case Article', 'Case Comment' (checked), and 'CaseComment'. The 'Add' button is highlighted with a blue box. The 'Export Settings' section on the right contains a blue box with an information icon and text: 'After you submit the export request, we retrieve data from your selected Salesforce objects and generate a file available for download for 7 days.' Below this is an 'Export from:' dropdown menu with 'Select an option'.

- Click **Filter** to add a filter to the object.

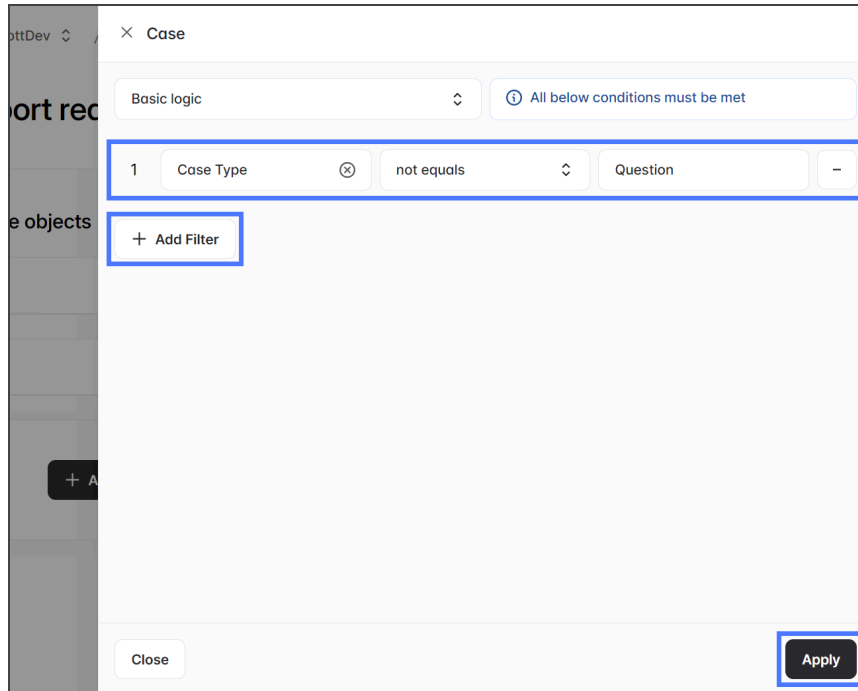
 Adding a filter is optional.



The screenshot shows the 'Create export request' form. The 'Select Salesforce objects' section now displays two rows: 'Case' and 'Case Comment'. Each row has a 'Filter' button (highlighted with a blue box) and a minus sign. The 'Add object' button is still visible at the bottom. The 'Export Settings' section on the right remains the same as in the previous screenshot.

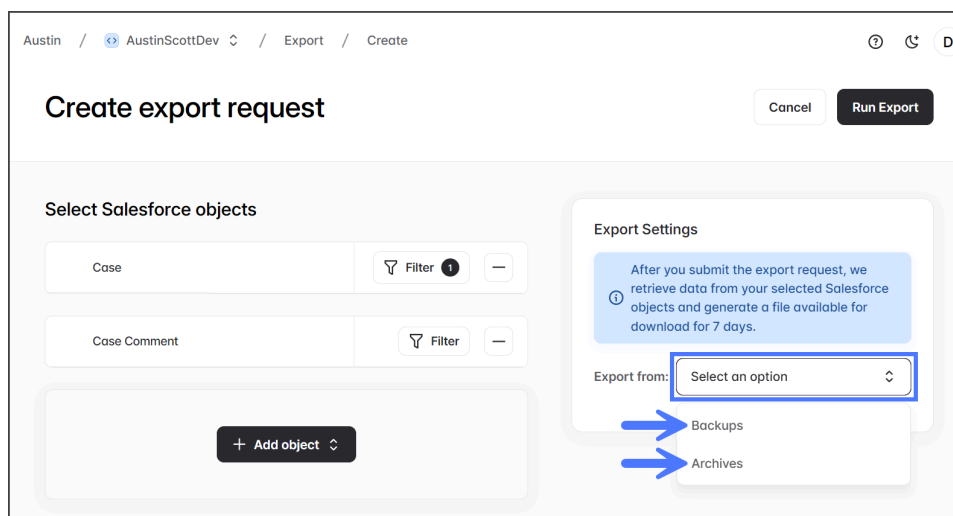
- Click **Add Filter** to add a filter criteria. You can add more criteria by clicking **Add Filter**.

10. Click **Apply** to save the filter.



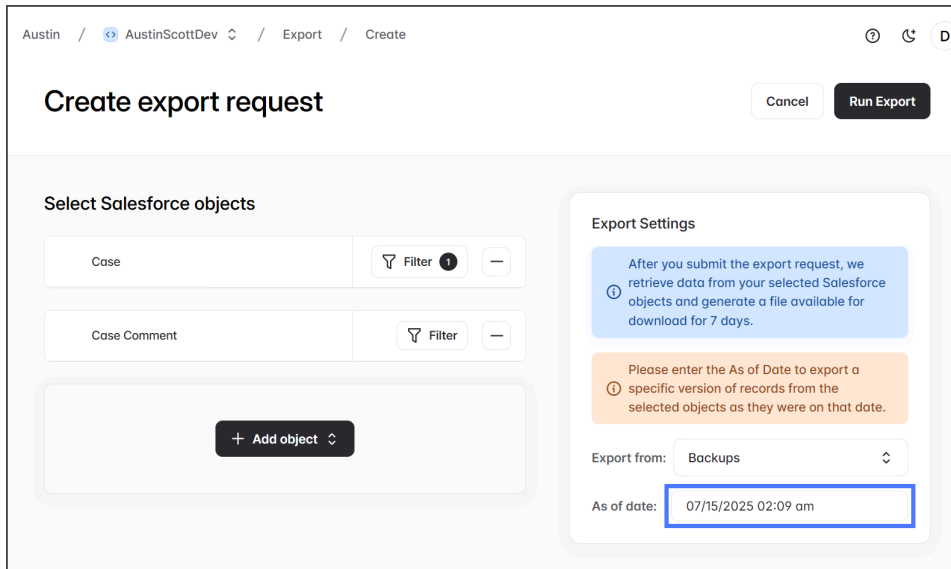
11. Click the **Export from** menu in the **Export Settings** section.

12. Select the source of the export: **Backups** or **Archives**. Configuring each is explained in the following two steps.



13. Backups: Select the **As of date**.

i The **As of date** lets you choose which version of the records to export based on that date. The records will be exported from the backup that was created closest to, but before, the selected date. For instance, if you have a daily backup at 4 AM and you want to export data from the first of the month, select the first of the month as your date and pick a time that is after the 4 AM backup but before any other backups that day.



Austin / AustinScottDev / Export / Create

Create export request

Cancel Run Export

Select Salesforce objects

Case Filter 1

Case Comment Filter

+ Add object

Export Settings

After you submit the export request, we retrieve data from your selected Salesforce objects and generate a file available for download for 7 days.

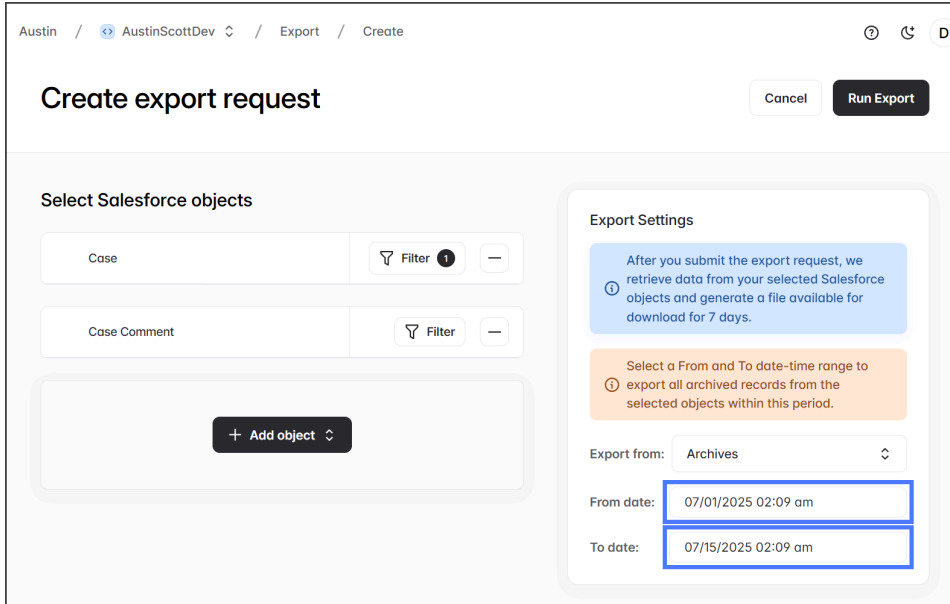
Please enter the As of Date to export a specific version of records from the selected objects as they were on that date.

Export from: Backups

As of date: 07/15/2025 02:09 am

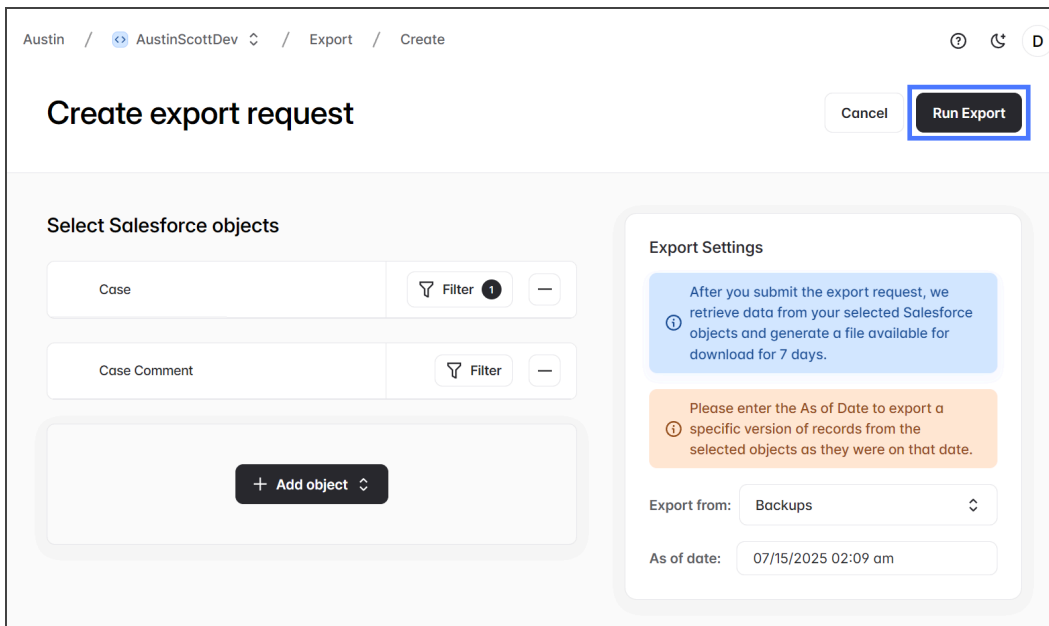
14. Archives: Select the **From date** and **To date**.

i The **From date** and **To date** fields enable you to select a range of archived records for export. The records will be exported from the archives created between the selected dates. For example, if you select dates from July 1st to July 15th and there are three archives within this period, the records for the chosen objects will be exported from all three archives.



The screenshot shows the 'Create export request' interface. On the left, under 'Select Salesforce objects', there are checkboxes for 'Case' and 'Case Comment', each with a 'Filter' button and a minus sign. Below these is a '+ Add object' button. On the right, the 'Export Settings' section contains a blue informational box, an orange instruction box, and two date input fields. The 'Export from' dropdown is set to 'Archives'. The 'From date' and 'To date' fields are both set to '07/01/2025 02:09 am' and '07/15/2025 02:09 am' respectively, and these fields are highlighted with blue boxes.

15. Click Run Export.



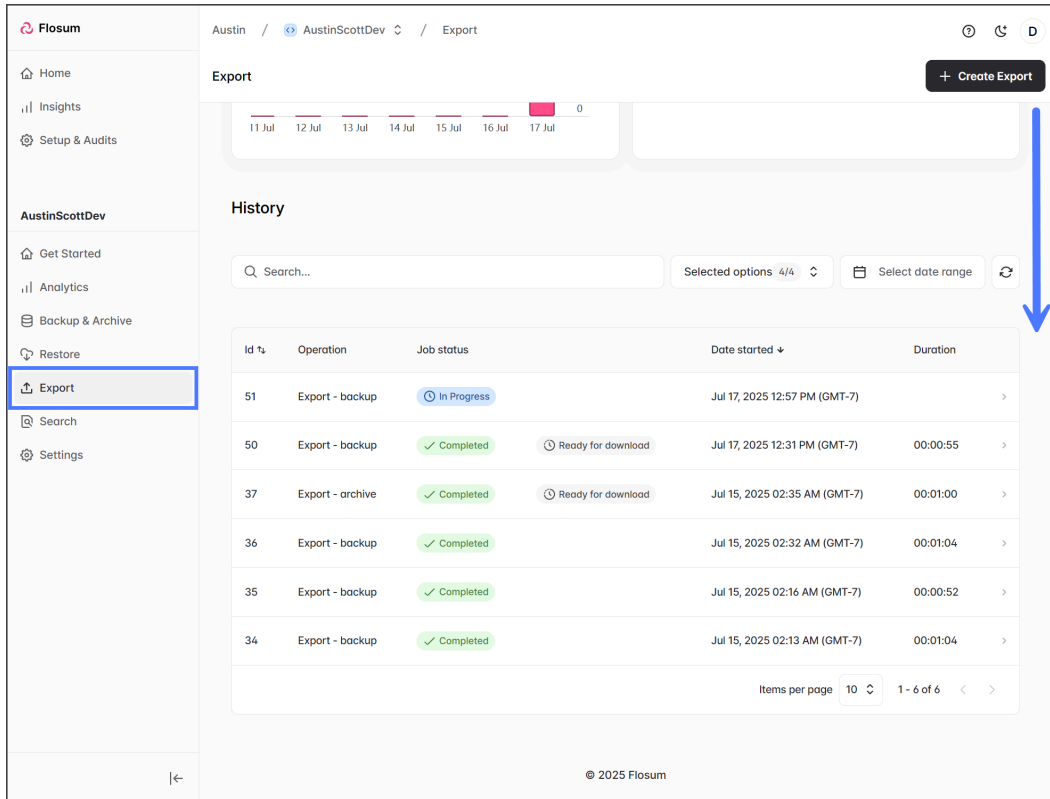
This screenshot shows the same 'Create export request' interface. In this view, the 'Run Export' button in the top right corner is highlighted with a blue box. The 'Export Settings' section now shows the 'Export from' dropdown set to 'Backups' and the 'As of date' field set to '07/15/2025 02:09 am'. The 'From date' and 'To date' fields are no longer present in this view.

View and Download Exports

You can view the status of export jobs and download completed exports from the **History** section of the **Export** page.

View Exports

1. From the **Export** page, scroll down to the **History** section.



The screenshot shows the Flosum web interface. On the left, a sidebar contains navigation links: Home, Insights, Setup & Audits, AustinScottDev (with sub-links: Get Started, Analytics, Backup & Archive, Restore, **Export**, Search, Settings), and a footer with a back arrow. The main content area is titled 'Export' and includes a '+ Create Export' button. Below this is a calendar for July 2025, with the 17th highlighted. The 'History' section is visible, featuring a search bar, 'Selected options 4/4', and a 'Select date range' button. A table lists export jobs with columns: Id, Operation, Job status, Date started, and Duration. The table shows six rows of data, with the first row in progress and the others completed. A blue arrow points to the 'History' section header.

Id	Operation	Job status	Date started	Duration
51	Export - backup	In Progress	Jul 17, 2025 12:57 PM (GMT-7)	
50	Export - backup	Completed Ready for download	Jul 17, 2025 12:31 PM (GMT-7)	00:00:55
37	Export - archive	Completed Ready for download	Jul 15, 2025 02:35 AM (GMT-7)	00:01:00
36	Export - backup	Completed	Jul 15, 2025 02:32 AM (GMT-7)	00:01:04
35	Export - backup	Completed	Jul 15, 2025 02:16 AM (GMT-7)	00:00:52
34	Export - backup	Completed	Jul 15, 2025 02:13 AM (GMT-7)	00:01:04

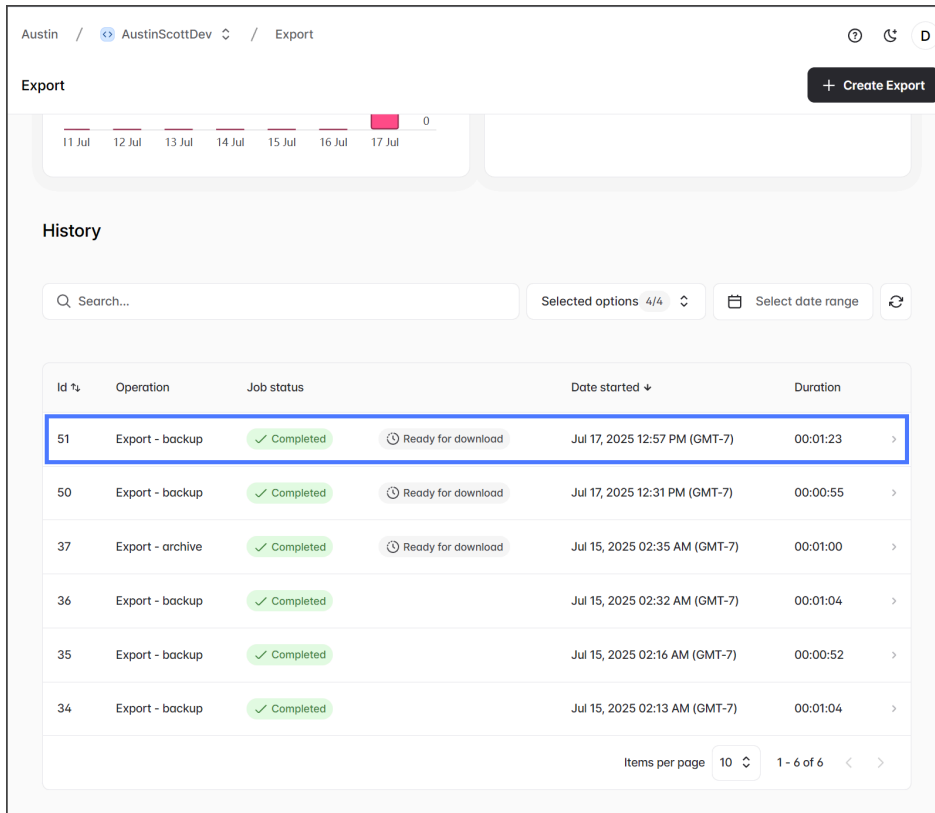
At the bottom of the table, it shows 'Items per page 10' and '1 - 6 of 6'.

2. When an export is started, it will display **In Progress** until it is completed.
3. When an export is completed, it will be marked as **Ready for download** if there are any records to be exported.
4. Click an export to view more details and download records.

Download Exports

Export files are in a zip archive with the following file naming: **download-OrgName-DateTime.zip**

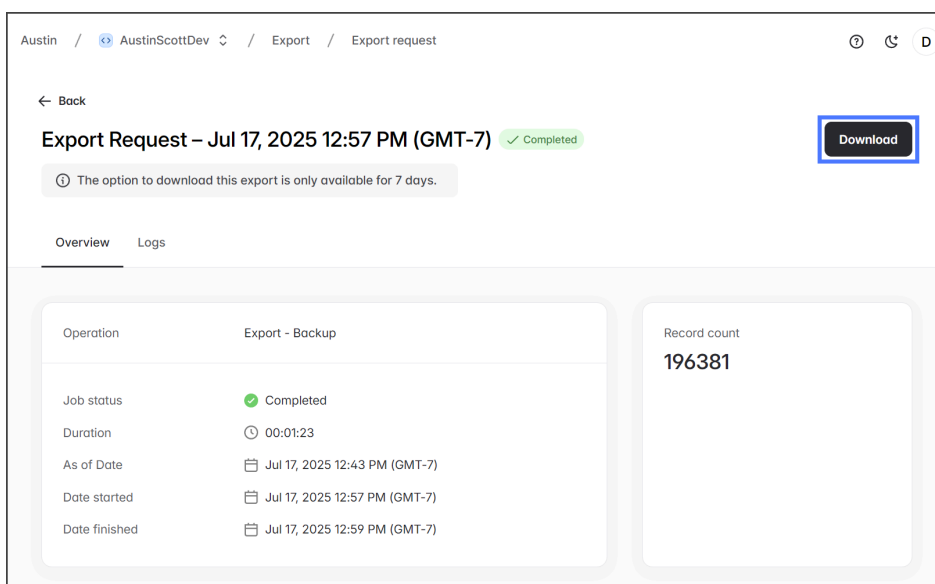
1. Click a **completed** export that is **Ready for download**.



The screenshot shows the 'Export' page in the Flosum interface. At the top, there's a breadcrumb trail: 'Austin / AustinScottDev / Export'. A '+ Create Export' button is in the top right. Below this is a calendar view for July, with the 17th highlighted. The 'History' section contains a search bar, 'Selected options 4/4', and a 'Select date range' button. A table lists export jobs with columns: Id, Operation, Job status, Date started, and Duration. The first row (ID 51) is highlighted with a blue border. It shows 'Export - backup', 'Completed', 'Ready for download', 'Jul 17, 2025 12:57 PM (GMT-7)', and '00:01:23'. Other rows show similar data for IDs 50, 37, 36, 35, and 34. At the bottom, there's a pagination bar showing 'Items per page 10' and '1 - 6 of 6'.

Id	Operation	Job status	Date started	Duration
51	Export - backup	Completed	Jul 17, 2025 12:57 PM (GMT-7)	00:01:23
50	Export - backup	Completed	Jul 17, 2025 12:31 PM (GMT-7)	00:00:55
37	Export - archive	Completed	Jul 15, 2025 02:35 AM (GMT-7)	00:01:00
36	Export - backup	Completed	Jul 15, 2025 02:32 AM (GMT-7)	00:01:04
35	Export - backup	Completed	Jul 15, 2025 02:16 AM (GMT-7)	00:00:52
34	Export - backup	Completed	Jul 15, 2025 02:13 AM (GMT-7)	00:01:04

2. Click **Download** to initiate the download process in your browser.



The screenshot shows the 'Export request' page for the selected export job. The breadcrumb trail is 'Austin / AustinScottDev / Export / Export request'. A 'Back' button is in the top left. The main heading is 'Export Request - Jul 17, 2025 12:57 PM (GMT-7)' with a 'Completed' status. A 'Download' button is highlighted with a blue border. Below this is a message: 'The option to download this export is only available for 7 days.' There are tabs for 'Overview' and 'Logs'. The 'Overview' tab is active, showing details about the export: Operation (Export - Backup), Job status (Completed), Duration (00:01:23), As of Date (Jul 17, 2025 12:43 PM (GMT-7)), Date started (Jul 17, 2025 12:57 PM (GMT-7)), and Date finished (Jul 17, 2025 12:59 PM (GMT-7)). On the right, a 'Record count' of 196381 is displayed.

Operation	Export - Backup
Job status	Completed
Duration	00:01:23
As of Date	Jul 17, 2025 12:43 PM (GMT-7)
Date started	Jul 17, 2025 12:57 PM (GMT-7)
Date finished	Jul 17, 2025 12:59 PM (GMT-7)

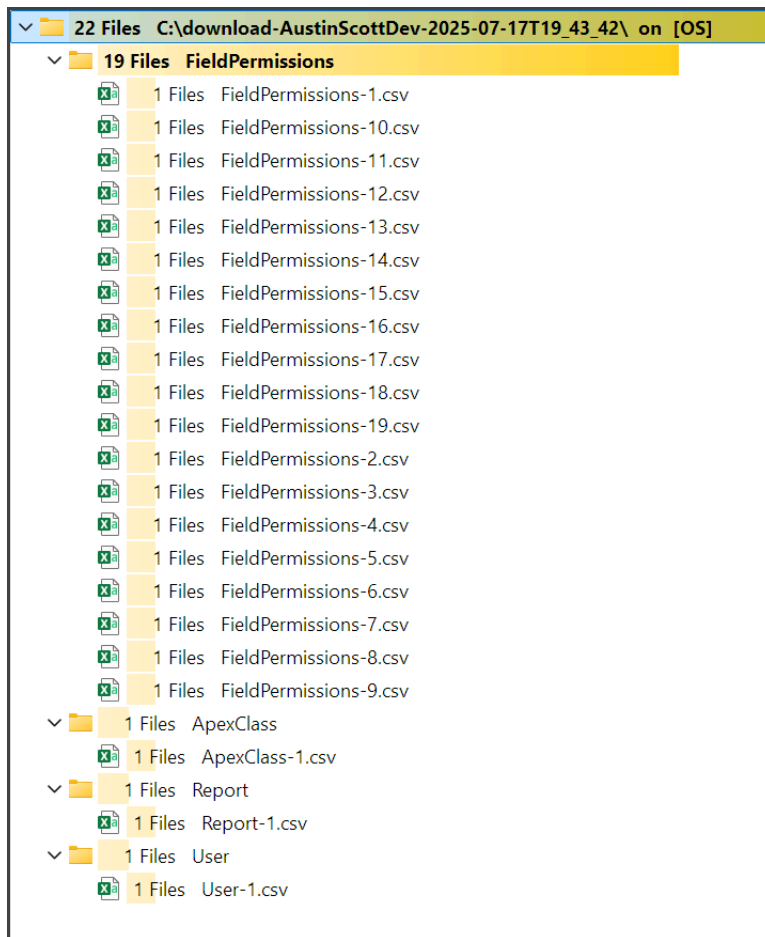
Record count
196381

Export File Structures

The exported file will have different file structures based on the type of export.

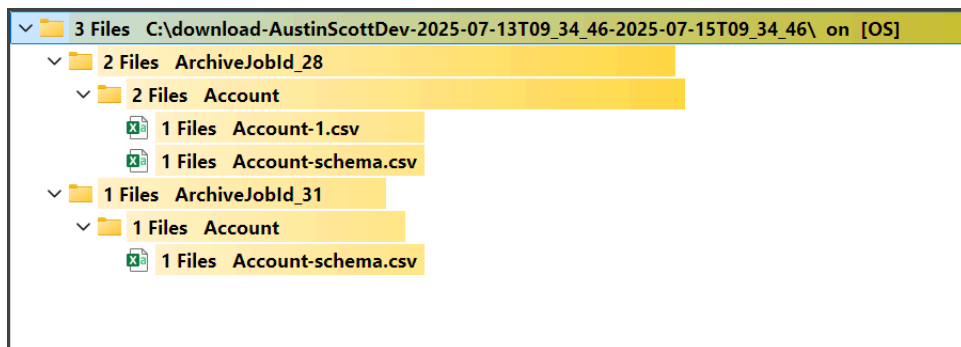
Backup Export Structure

The .zip file contains a folder for each exported object, and each folder includes one or more CSV files with record data. Each CSV file contains up to 10,000 records. If there are more than 10,000 records, multiple files are created. In the screenshot below, the export includes the **FieldPermissions**, **ApexClass**, **Report**, and **User** objects. The FieldPermissions object has more than 10,000 records, so it is split into multiple files.



Archive Export Structure

The .zip file contains folders for each archive job named **Archive Job ID**. Each Archive Job folder contains subfolders for each object, and each subfolder includes one or more CSV files with record data. Each CSV file contains up to 10,000 records. If there are more than 10,000 records, multiple files are created. The screenshot below shows an export with two archives, each containing the Account object.

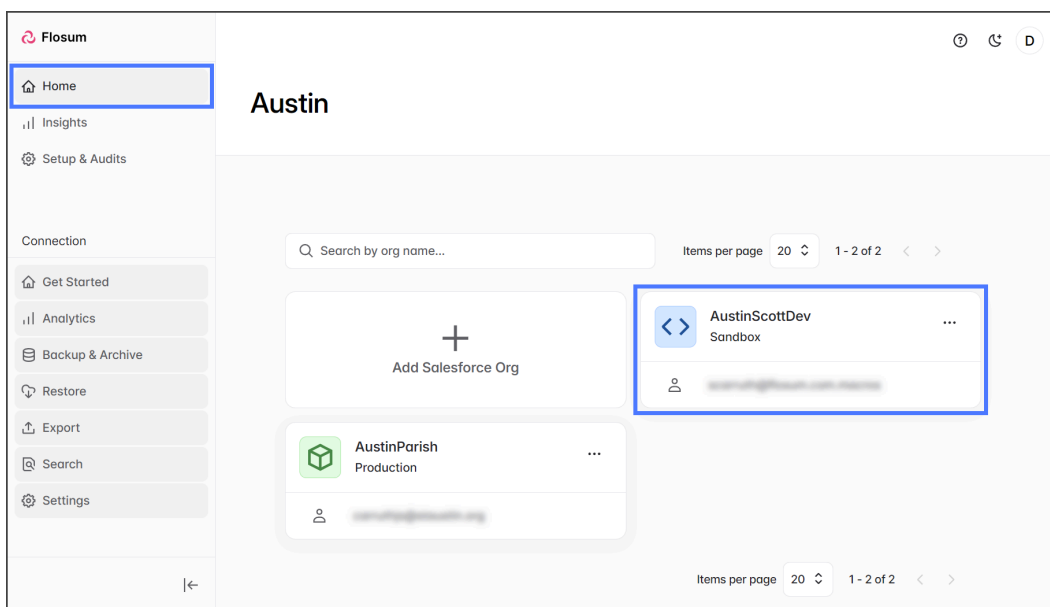


Search Operations

Use this feature to locate specific records across your backup and archive files in order to purge them. The search function retrieves records similar to how you restore them with a Search Job, followed by a Purge Job.

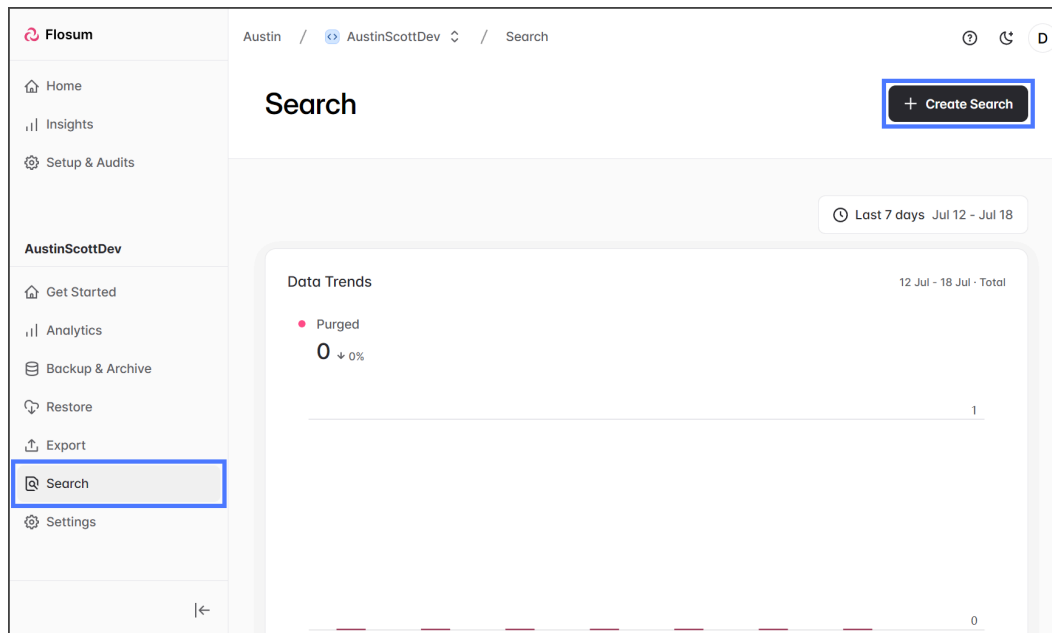
Create a Search Job

1. From the **Home** page, select the **Org** to search.

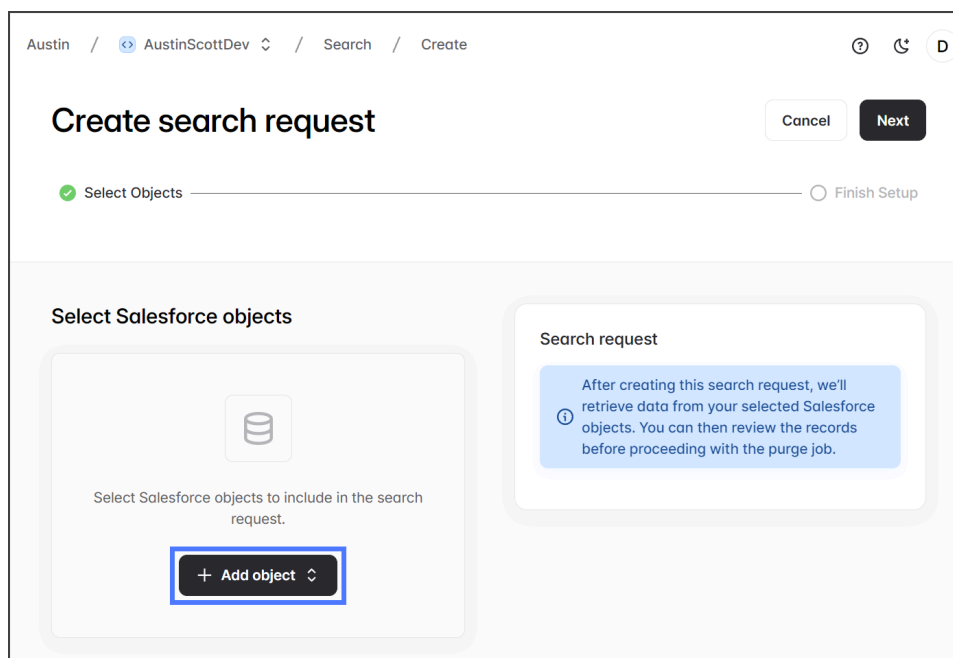


2. Click **Search** from the sidebar menu.

3. Click **Create Search**.



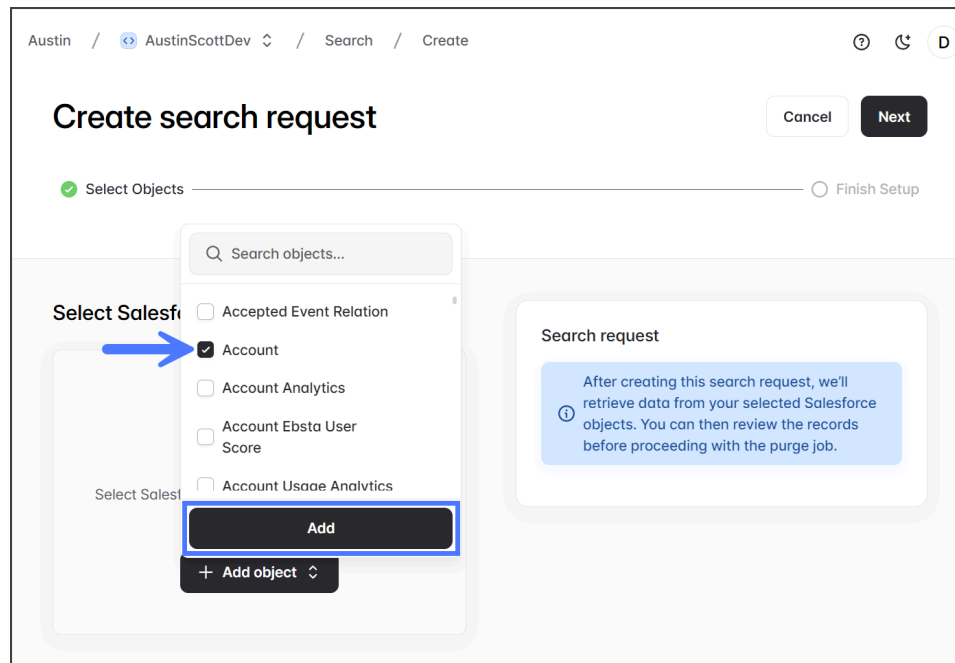
4. Click the **Add object** menu button to select the Salesforce Objects to include in the search.



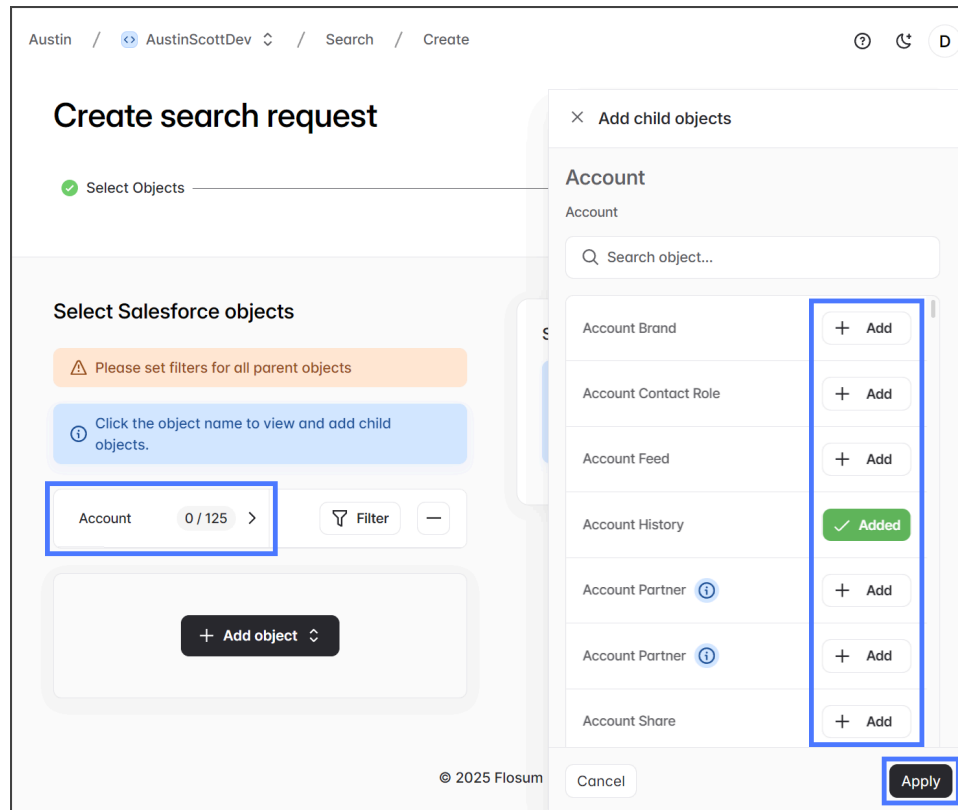
5. Search or browse for objects from the menu.

6. Check the objects you want to add.

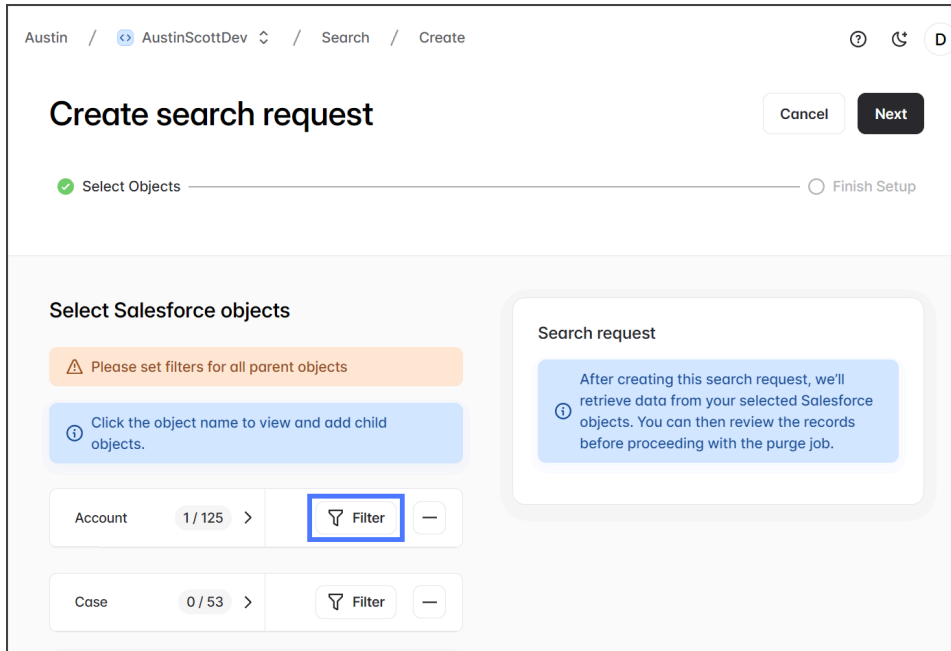
7. Click **Add** to add all of the selected objects.



8. (Optional) Click an object to open the **Add child objects** dialog.
 - a. Click the **+ Add** button next to each of the child objects to add.
 - b. Once you have added all the objects, click **Apply** to save the changes.



9. Click **Filter** to add a filter to the object. Filters are required for search operations.



Austin / < AustinScottDev > / Search / Create

Create search request Cancel Next

✔ Select Objects ○ Finish Setup

Select Salesforce objects

⚠ Please set filters for all parent objects

ℹ Click the object name to view and add child objects.

Account 1 / 125 > Filter —

Case 0 / 53 > Filter —

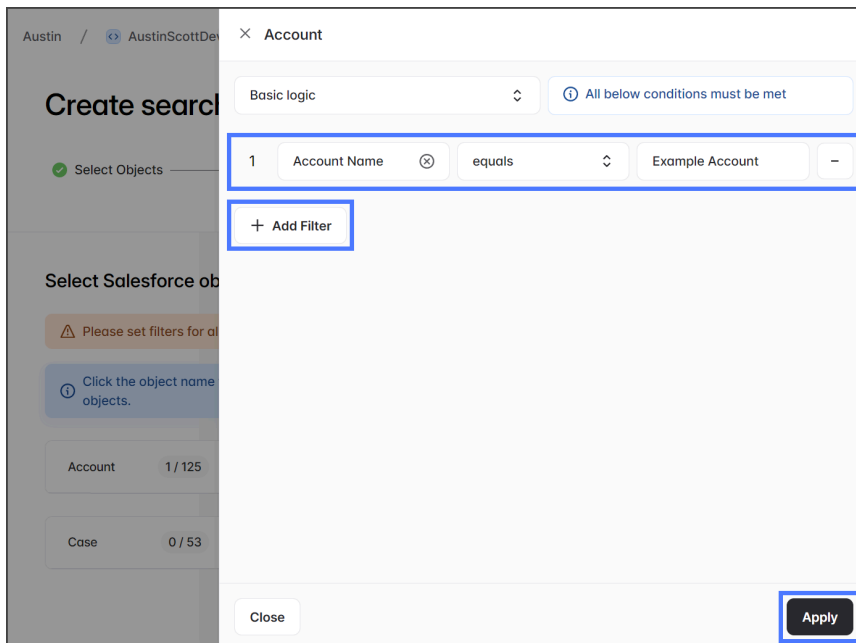
Search request

ℹ After creating this search request, we'll retrieve data from your selected Salesforce objects. You can then review the records before proceeding with the purge job.

10. Click **Add Filter** in the filter dialog to add a filter criteria.

11. The screenshot below shows an example filter.

12. Click **Apply** to save the filter.



Austin / < AustinScottDev > × Account

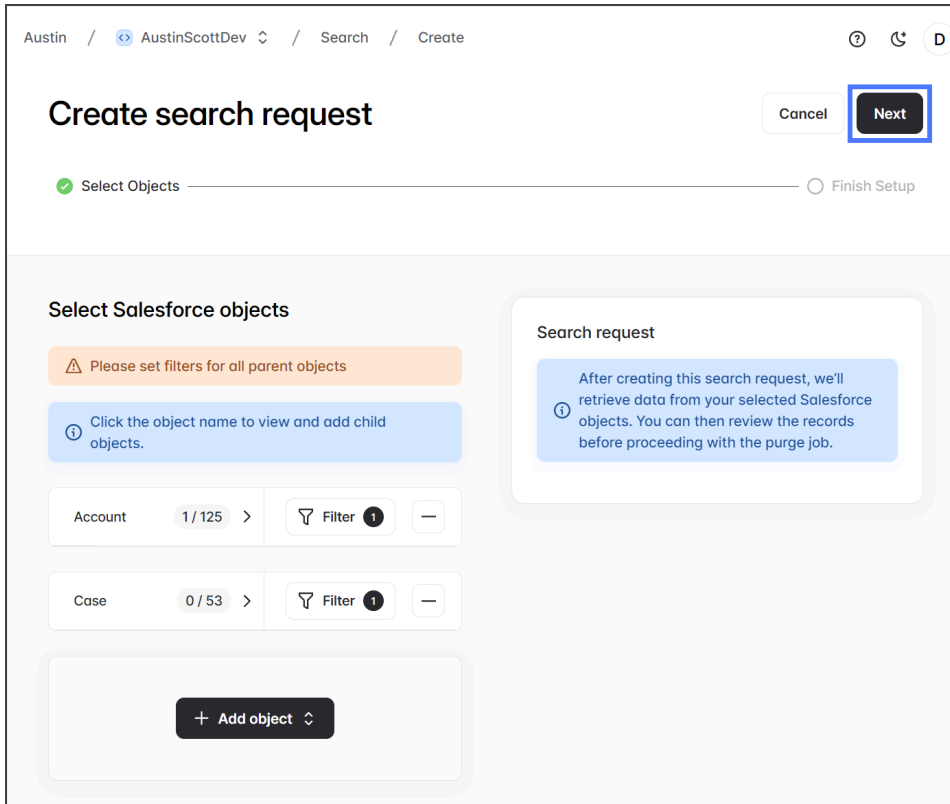
Basic logic ℹ All below conditions must be met

1 Account Name ⊗ equals ⌵ Example Account —

+ Add Filter

Close Apply

13. Click **Next**.



Austin / < AustinScottDev > / Search / Create

Create search request Cancel **Next**

✔ Select Objects ————— ○ Finish Setup

Select Salesforce objects

⚠ Please set filters for all parent objects

① Click the object name to view and add child objects.

Account 1 / 125 > Filter 1 —

Case 0 / 53 > Filter 1 —

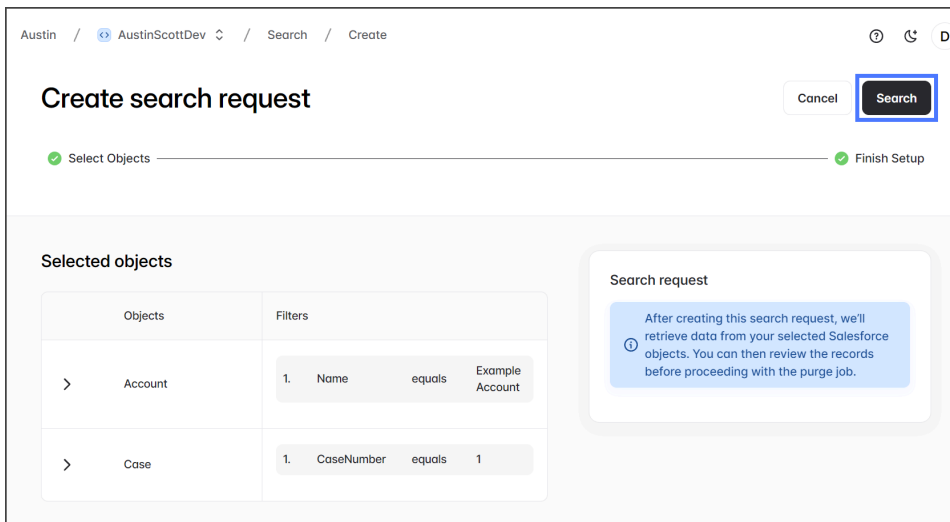
+ Add object >

Search request

① After creating this search request, we'll retrieve data from your selected Salesforce objects. You can then review the records before proceeding with the purge job.

14. Review the selected objects and filters.

15. Click **Search** to start the search.



Austin / < AustinScottDev > / Search / Create

Create search request Cancel **Search**

✔ Select Objects ————— ✔ Finish Setup

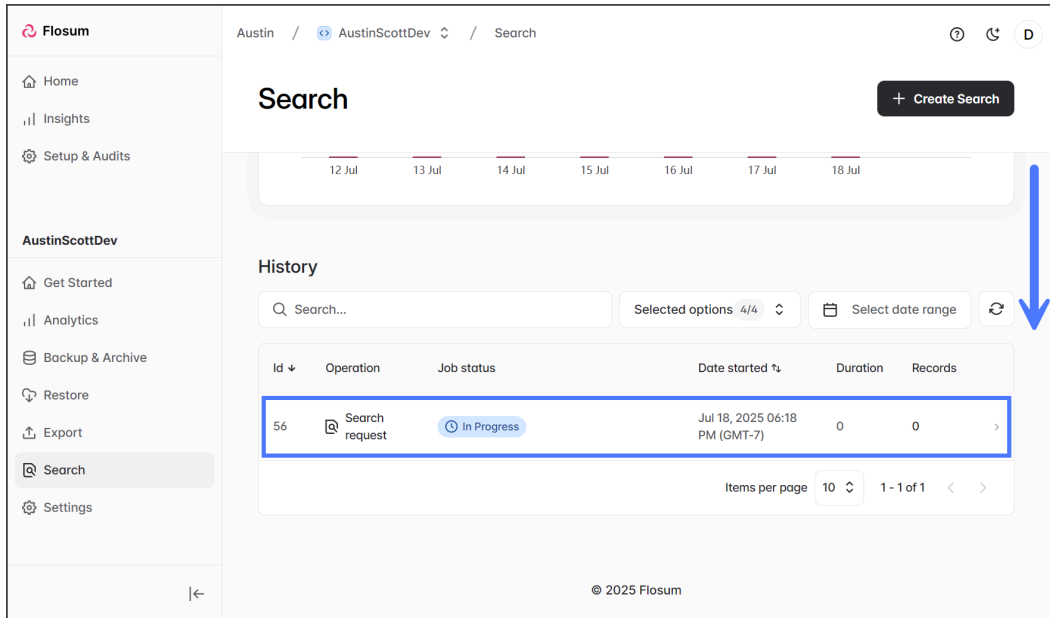
Selected objects

Objects	Filters
> Account	1. Name equals Example Account
> Case	1. CaseNumber equals 1

Search request

① After creating this search request, we'll retrieve data from your selected Salesforce objects. You can then review the records before proceeding with the purge job.

16. Scroll down to the **History table to view the status of the Search Job.**



The screenshot shows the Flosum Search interface. On the left is a sidebar with navigation links: Home, Insights, Setup & Audits, AustinScottDev, Get Started, Analytics, Backup & Archive, Restore, Export, Search (highlighted), and Settings. The main content area is titled 'Search' and includes a '+ Create Search' button. Below this is a timeline from 12 Jul to 18 Jul. The 'History' section contains a search bar, 'Selected options 4/4', and a 'Select date range' button. A table lists search jobs with columns: Id, Operation, Job status, Date started, Duration, and Records. One job is listed with Id 56, Operation 'Search request', and Job status 'In Progress'. A blue arrow points to the 'In Progress' status.

Id	Operation	Job status	Date started	Duration	Records
56	Search request	In Progress	Jul 18, 2025 06:18 PM (GMT-7)	0	0

Items per page: 10 | 1 - 1 of 1






Review a Search Request

Once your Search Request has completed, you can review its details and results. The data in a search request is organized as follows:

Search Request > Data > Object > Version > Record > Fields/Data

1. Scroll down to the **History** table on the **Search** page to view all of the completed search jobs.
2. Click a **Search Request** job to view the records that were found during the search.


i The **Records** column indicates the number of records found in response to your search request. The **Ready for Purge** tag will only appear if the search job completes with one or more matching records. If the search job does not find any records that match the search criteria, no data will be available for viewing or purging.


Austin /  AustinScottDev  / Search    D


Search










+ Create Search




History

Selected options 4/4 

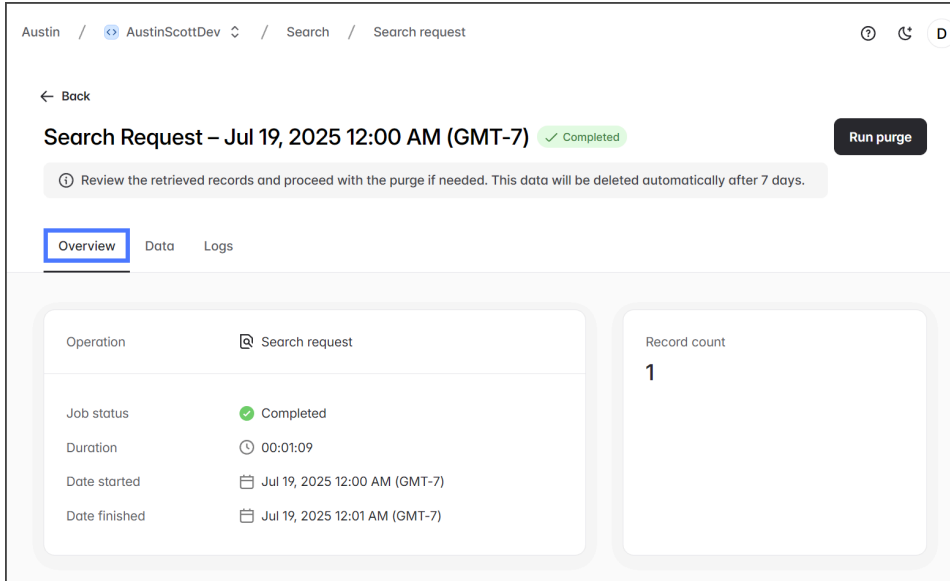
Select date range 



Id 	Operation	Job status	Date started 	Duration	Records
57	 Search request	 Completed  Ready for purge	Jul 19, 2025 12:00 AM (GMT-7)	00:01:09	1 
56	 Search request	 Completed	Jul 18, 2025 06:18 PM (GMT-7)	00:00:59	0 

Items per page 10  1 - 2 of 2  

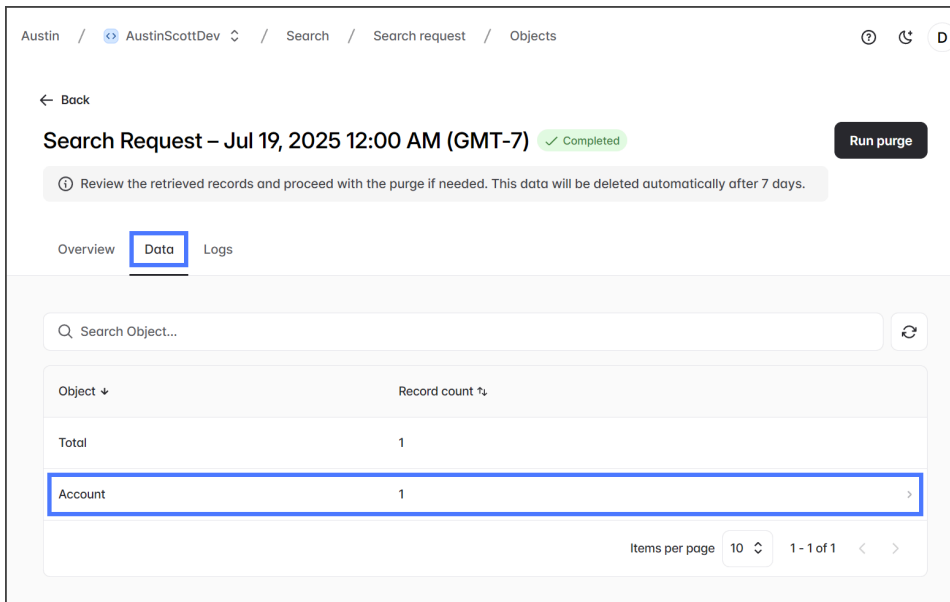
3. The **Overview** tab displays details about the search job.



The screenshot shows the 'Overview' tab of a search request. The breadcrumb trail is 'Austin / AustinScottDev / Search / Search request'. The page title is 'Search Request – Jul 19, 2025 12:00 AM (GMT-7)' with a green 'Completed' status. A 'Run purge' button is in the top right. A message states: 'Review the retrieved records and proceed with the purge if needed. This data will be deleted automatically after 7 days.' Below this are three tabs: 'Overview' (selected), 'Data', and 'Logs'. The main content area is divided into two panels. The left panel shows details for the 'Search request' operation: Job status is 'Completed', Duration is '00:01:09', Date started is 'Jul 19, 2025 12:00 AM (GMT-7)', and Date finished is 'Jul 19, 2025 12:01 AM (GMT-7)'. The right panel shows a 'Record count' of '1'.

4. Click the **Data** tab to view the data found by the search.

5. Click an object to view the records for that object.



The screenshot shows the 'Data' tab of the same search request. The breadcrumb trail is 'Austin / AustinScottDev / Search / Search request / Objects'. The page title and status are the same. The 'Run purge' button is present. The message about data deletion is also present. Below the tabs, there is a search bar labeled 'Search Object...'. A table displays the search results:

Object	Record count
Total	1
Account	1

The 'Account' row is highlighted with a blue border. At the bottom right, there is a pagination control showing 'Items per page 10' and '1 - 1 of 1'.

6. Click a record to view the versions of that record.

Austin / [AustinScottDev](#) / Search / Search request / Objects / Account

← Back

Account

Search request - Jul 19, 2025 12:00 AM (GMT-7)

API Name Account

Searched **1**

Records

Search Records...

Id ↕	Name ↕	Owner	Current backup Name	Last modified ↕
001Ou00000NSDBaIAP	ACME Brick	Scott Dev	Default Composite Backup	Jul 14, 2025 05:00 AM (GMT-7)

Items per page 10 1 - 1 of 1

7. Click a version to view the fields and data for that version of the record.

Austin / [AustinScottDev](#) / Search / Search request / Objects / Account / 001Ou00000NSDBaIAP

← Back

001Ou00000NSDBaIAP

Search request - Jul 19, 2025 12:00 AM (GMT-7)

Versions

Id ↕	Current	Backup name	Last modified ↕
001Ou00000NSDBaIAP		Default Composite Backup	Jul 8, 2025 05:00 AM (GMT-7)
001Ou00000NSDBaIAP		Default Composite Backup	Jul 9, 2025 05:00 AM (GMT-7)
001Ou00000NSDBaIAP		Default Composite Backup	Jul 10, 2025 05:00 AM (GMT-7)
001Ou00000NSDBaIAP		Default Composite Backup	Jul 14, 2025 05:00 AM (GMT-7)
001Ou00000NSDBaIAP	Current	Corrupt Backup	Jul 14, 2025 04:37 PM (GMT-7)

Items per page 10 1 - 8 of 8

8. You can search or browse to view all of the data in the fields of this record.

Austin /
AustinScottDev
/ Search / Search request / Objects / Account / 001Ou00000NSDBaIAP / 3098
D

Back

001Ou00000NSDBaIAP

Search request - Jul 19, 2025 12:00 AM (GMT-7)

Owner

Last modified

Jul 8, 2025 05:00 AM (GMT-7)

Fields


381

Fields


Id	IsDeleted	MasterRecordId
001Ou00000NSDBaIAP	false	
Name	Type	RecordTypeId
ACME Brick	Customer - Direct	0121P000000oRvSQUAU
ParentId	BillingStreet	BillingCity
BillingState	BillingPostalCode	BillingCountry
BillingStateCode	BillingCountryCode	BillingLatitude
BillingLongitude	BillingGeocodeAccuracy	ShippingStreet
ShippingCity	ShippingState	ShippingPostalCode


Purge Data (Optional)

After reviewing the records identified by a search job, you can start a purge job. This process will remove all records found in the search job from every version listed. The purpose of purging data is to help you comply with GDPR requirements.

 Purging Data will only delete records from the Flosum **Backup & Restore** app. No data will be deleted from **Salesforce**.

1. Scroll down to the **History** table on the **Search** page to view all of the completed search jobs.
2. Click a **Search Request** job that is marked as **Ready for purge**.

 Only **Search Requests** that have one or more **Records** and haven't been purged will be marked as **Ready for purge**.

Austin /  AustinScottDev / Search
? 🔄 D

Search

+ Create Search



History

Selected options 4/4

⌵

📅 Select date range

🔄

Id ↕	Operation	Job status	Date started ↕	Duration	Records
57	 Search request	<div>✓ Completed</div> <div>🕒 Ready for purge</div>	Jul 19, 2025 12:00 AM (GMT-7)	00:01:09	1 >
56	 Search request	<div>✓ Completed</div>	Jul 18, 2025 06:18 PM (GMT-7)	00:00:59	0 >

Items per page 10


⌵

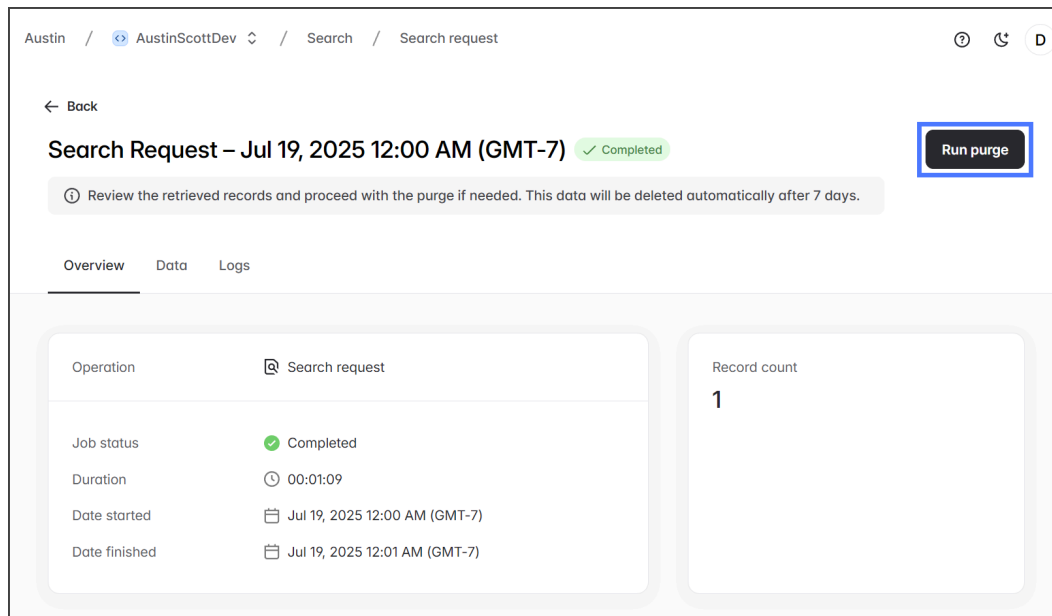
1 - 2 of 2

<

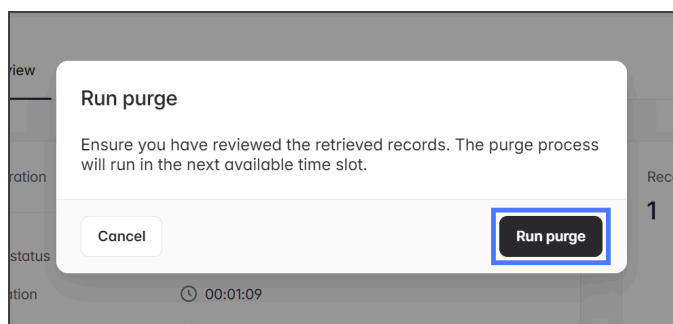
>

3. Click **Run purge**.

 Running a **Purge** will permanently remove the selected data from all backups and archives. Ensure you have confirmed that the correct data is chosen for deletion, as this process cannot be reversed.



4. Click **Run purge** on the **Run purge** confirmation dialog box.



5. Scroll down to the **History** table to view the status of the Purge Job.

Austin / < AustinScottDev > / Search
? 🔄 D

Search
+ Create Search

History

Selected options 4/4 >
Select date range
🔄

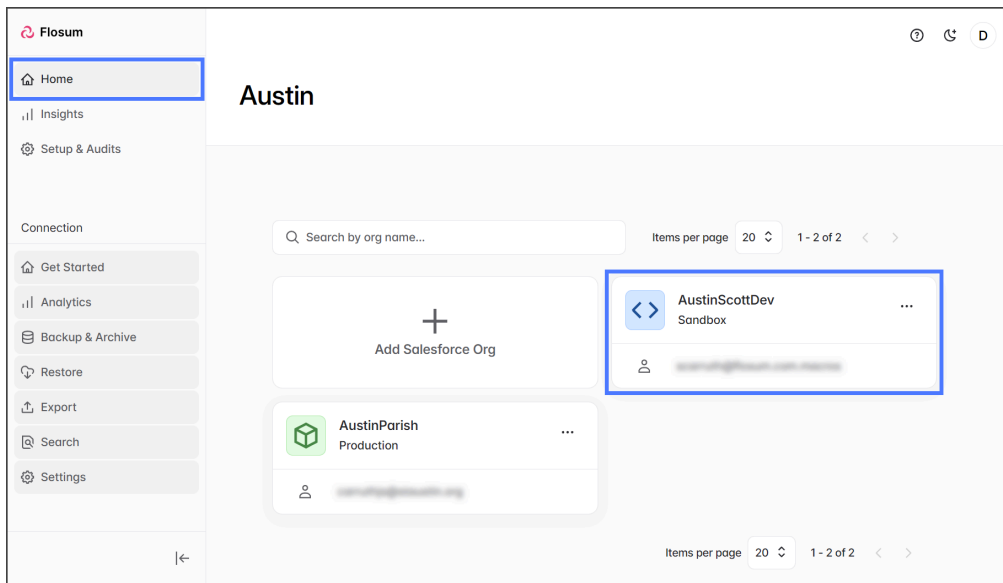
Id ↕	Operation	Job status	Date started ↕	Duration	Records
62	🗑️ Purge	🕒 In Progress	Jul 19, 2025 11:30 AM (GMT-7)	0	>
57	🔍 Search request	✅ Completed	Jul 19, 2025 12:00 AM (GMT-7)	00:01:09	1 >
56	🔍 Search request	✅ Completed	Jul 18, 2025 06:18 PM (GMT-7)	00:00:59	0 >

Items per page 10 >
1 - 3 of 3 < >

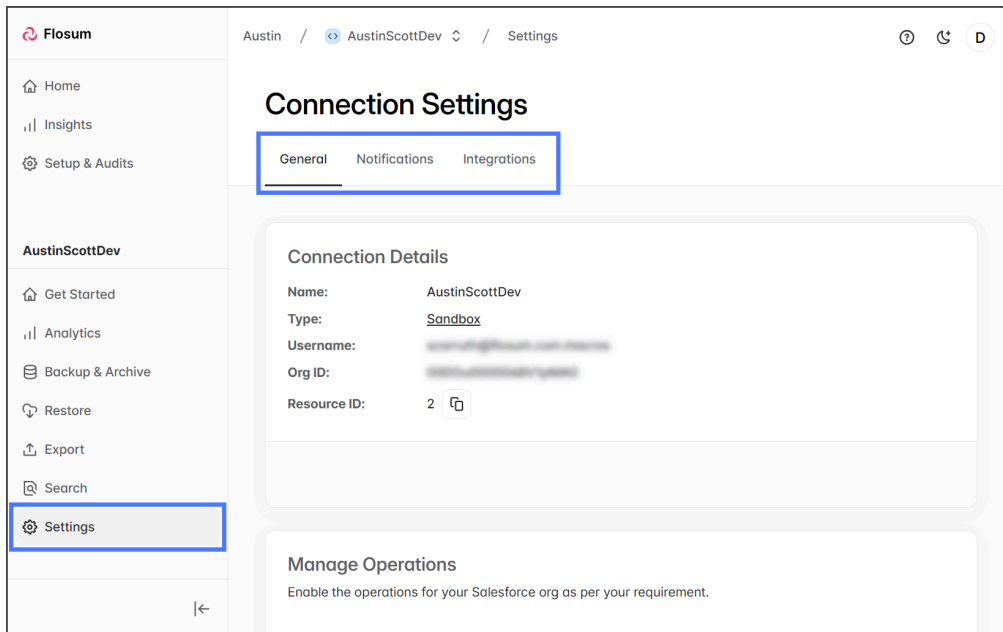
Settings

The **Settings** page item allows you to view general details about your tenant, set notifications, and configure integrations.

1. From the **Home** page, select the **Org** to view settings.



2. Click **Settings** from the sidebar menu.
3. Navigate to **General**, **Notifications**, and **Integrations** settings using the tabs.

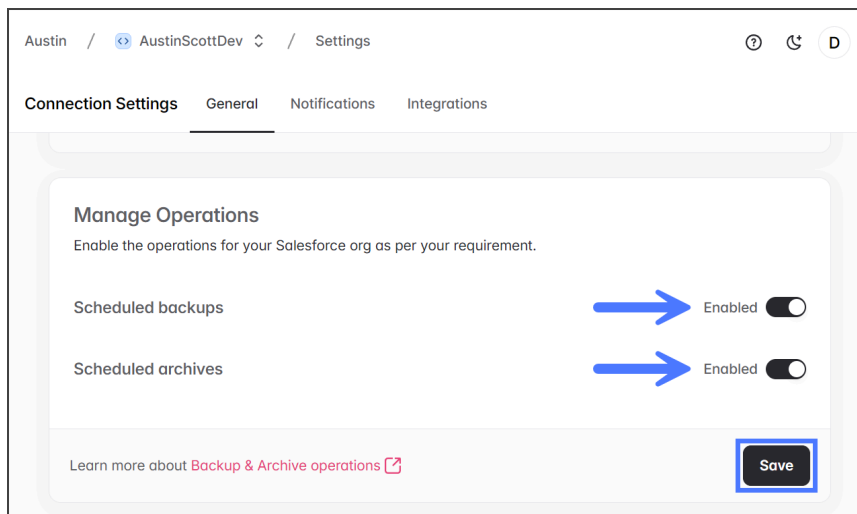


General Tab

The **General** Settings tab allows you to review the details of your tenant's connection to your Salesforce org, manage backup and archive operations, set API quotas, and delete the connection.

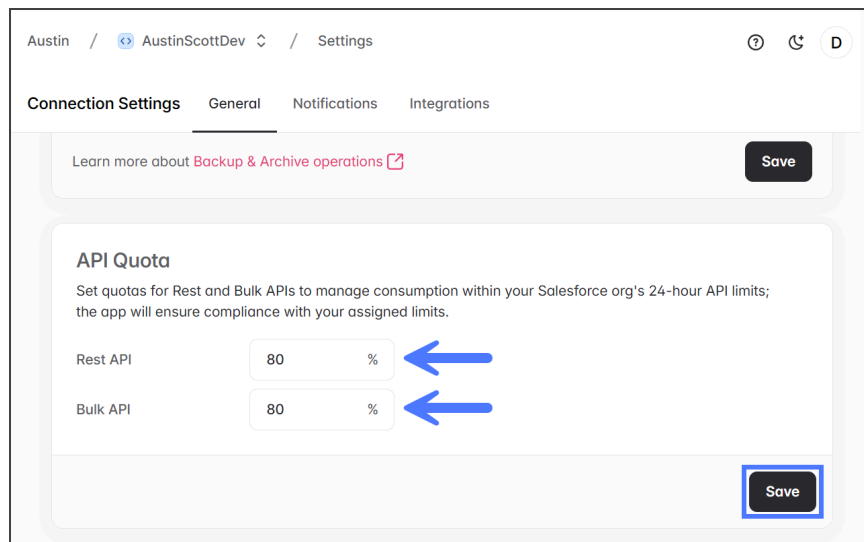
Manage Operations

By default, Flosum automatically enables scheduled backups and archives. This provides a restore point in case of data loss. If you turn off these settings, you cannot schedule backup or archive operations. If you make changes, click **Save** to apply them.



Configuration API Quota

Salesforce has governor limits on its API to prevent any single customer from overusing resources on its Points of Determination (PoDs). By default, Flosum caps Rest and Bulk API calls at 80%. This helps ensure that your backup and archive jobs stay within the governor limits while allowing other API operations to run. As a best practice, keep the limits at 80% to maintain capacity for other API calls and avoid job suspension if you exceed the 24-hour API limits. However, if necessary, you can change these limits. If you make changes, click **Save** to apply them.



The screenshot shows the Flosum Settings page for user AustinScottDev. The 'Connection Settings' tab is active, with sub-tabs for General, Notifications, and Integrations. A 'Save' button is visible in the top right. Below a link to 'Learn more about Backup & Archive operations', the 'API Quota' section is displayed. It contains a description: 'Set quotas for Rest and Bulk APIs to manage consumption within your Salesforce org's 24-hour API limits; the app will ensure compliance with your assigned limits.' Two input fields are shown: 'Rest API' with a value of '80' and a percentage sign, and 'Bulk API' with a value of '80' and a percentage sign. Blue arrows point to the percentage signs in both fields. A 'Save' button is located at the bottom right of the API Quota section.

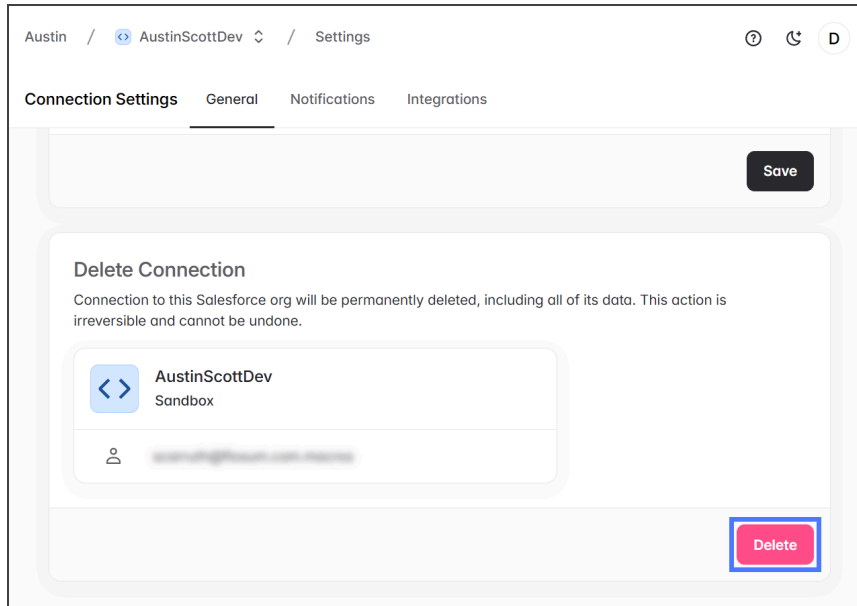
API Type	Quota (%)
Rest API	80 %
Bulk API	80 %

Delete Connection

The Delete Connection section allows you to permanently remove the Salesforce Org connected to your tenant. Click **Delete** to perform this operation.



Deleting an Org Connection will remove all backups, archives, and any other data related to this Org from Flosum Backup & Archive. This action is not reversible.



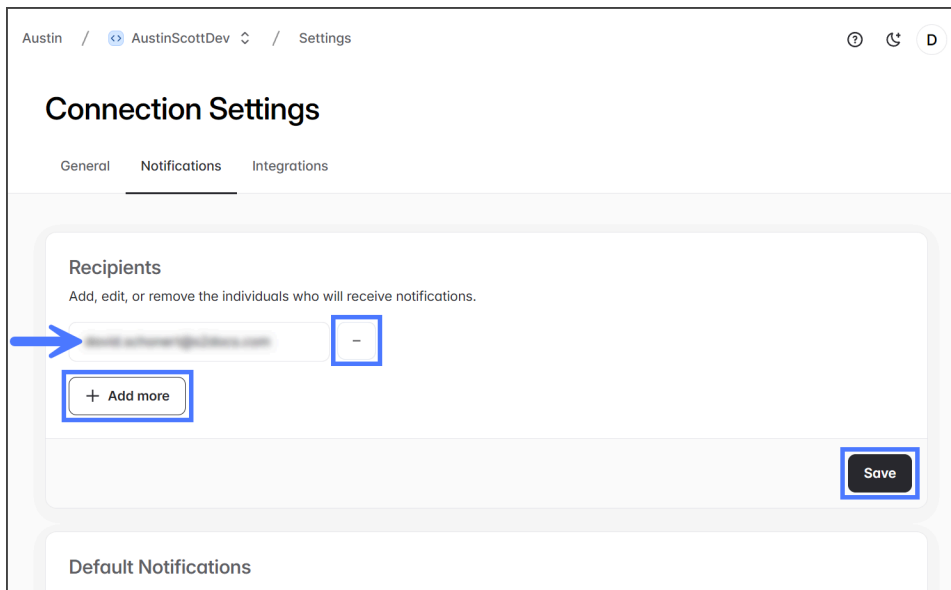
Notifications

The **Notifications** settings tab provides options for configuring notifications for your tenant. The notification settings are divided into three parts: **Recipients**, **Default Notifications**, and **Custom Notifications**.

Recipients

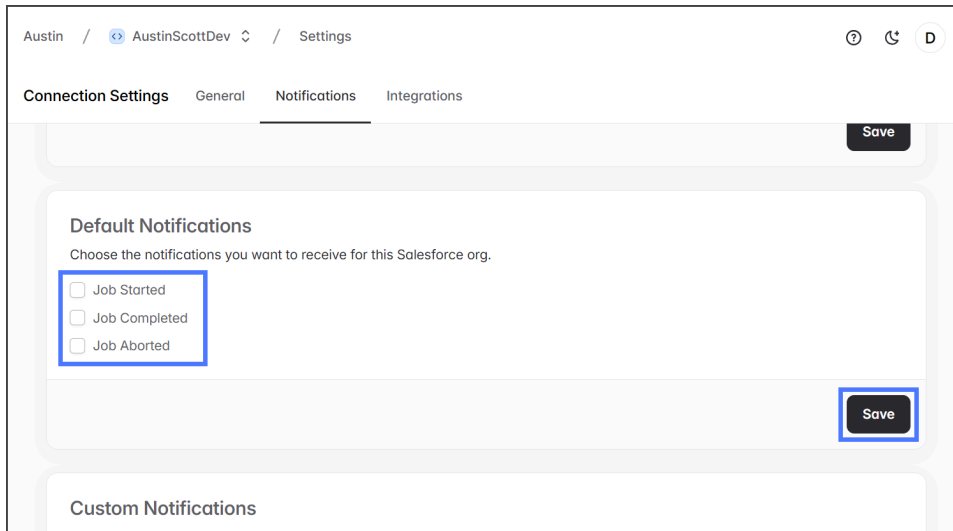
You can add, edit, and remove email addresses to the list of recipients to receive notifications.

1. Click **Add More** to add an email address.
2. Remove recipients from the list by clicking the **minus** “-” symbol next to their email address.
3. Click **Save** to apply any changes.



Default Notifications

Enable default notifications for job **Starts**, **Completions**, and **Aborts**. If you make changes, click **Save** to apply them.



The screenshot shows the Flosum Settings page for a user named Austin. The page has a breadcrumb trail: Austin / AustinScottDev / Settings. There are tabs for Connection Settings, General, Notifications, and Integrations. The Notifications tab is selected. A 'Save' button is in the top right corner. The 'Default Notifications' section is highlighted with a blue box. It contains the text 'Choose the notifications you want to receive for this Salesforce org.' and three checkboxes: 'Job Started', 'Job Completed', and 'Job Aborted'. A 'Save' button is also highlighted with a blue box at the bottom right of the section. Below this is the 'Custom Notifications' section.

Austin / AustinScottDev / Settings

Connection Settings General **Notifications** Integrations

Save

Default Notifications

Choose the notifications you want to receive for this Salesforce org.

☐ Job Started

☐ Job Completed

☐ Job Aborted

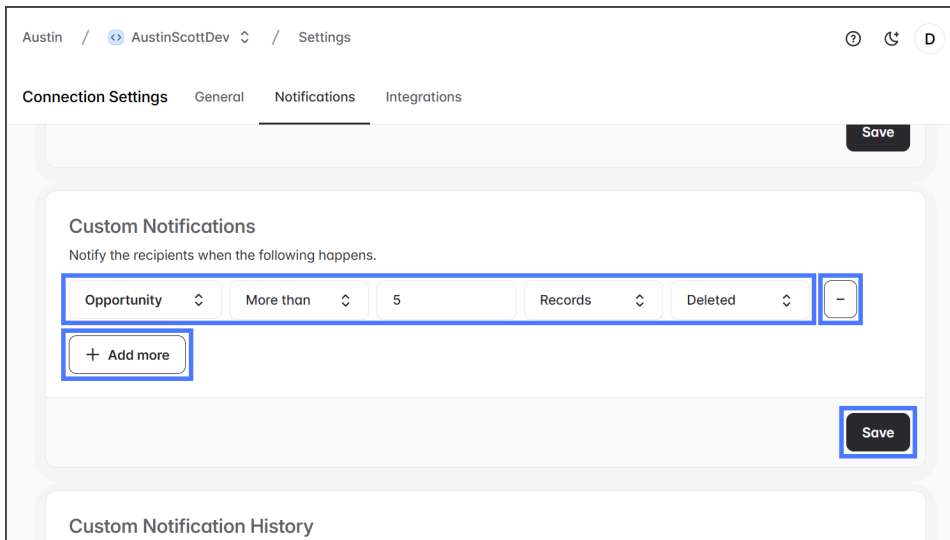
Save

Custom Notifications

Custom Notifications

Custom Notifications enable you to select specific objects and events for which you want to receive notifications. This is useful for monitoring particular object-level changes, such as spikes in new records, updates, or deletions. Each rule is evaluated after a backup has completed.

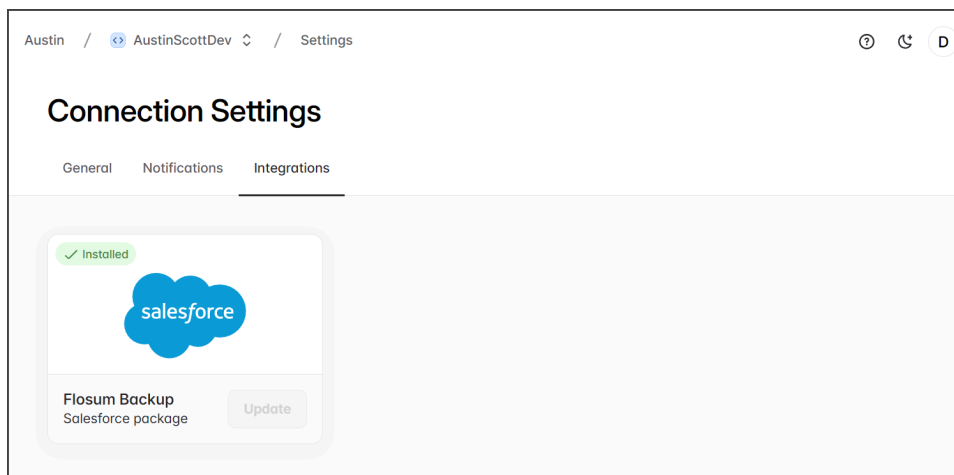
1. Click **Add More** to add a custom notification.
2. Configure the notification to meet your needs.
3. Remove notifications from the list by clicking the **minus “-”** symbol.
4. Click **Save** to apply any changes.



The screenshot shows the 'Settings' page for a connection named 'AustinScottDev'. The 'Notifications' tab is selected. Under 'Custom Notifications', there is a list of rules. One rule is configured: 'Opportunity' (object), 'More than' (operator), '5' (value), 'Records' (event type), and 'Deleted' (event). A minus sign button is to the right of this rule. Below the list is an 'Add more' button. A 'Save' button is at the bottom right of the notification section. The 'Custom Notification History' section is visible at the bottom.

Integrations

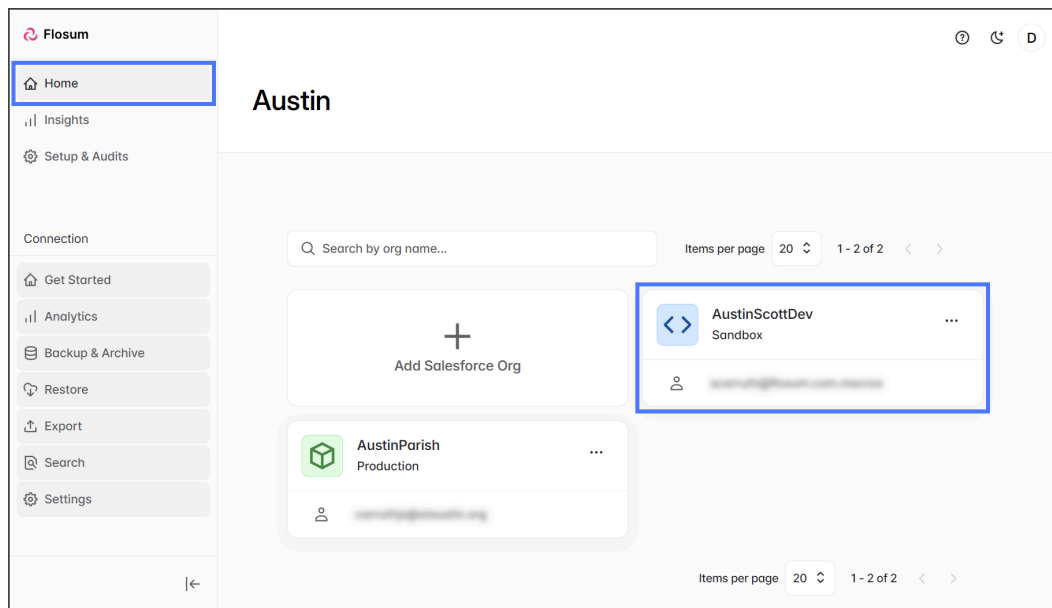
With the latest version of Flosum Backup & Archive, Flosum offers a Lightning Web Component that you can install in your Salesforce organization to view your archived files. This component is installed through a managed package during the initial connection to your Salesforce org. Additionally, the Integrations tab allows you to update the integration as needed.



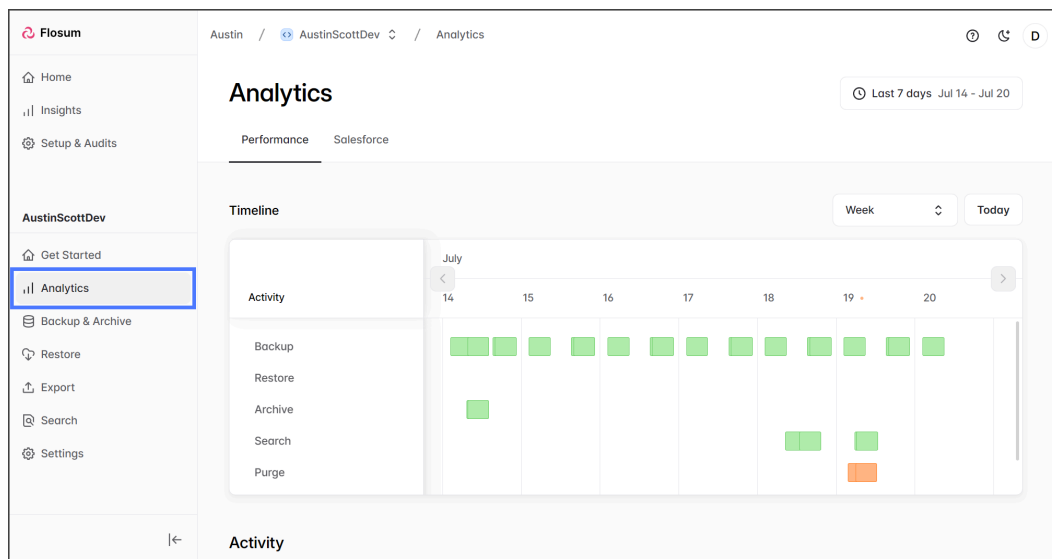
Analytics

The Flosum Analytics Dashboard provides detailed insights into your Salesforce environments, including usage trends, backup statistics, and storage metrics. This section guides you through the analytics and explains key visualizations.

1. From the **Home** page, select the **Org** to analyze.



2. Click **Analytics** from the sidebar menu.

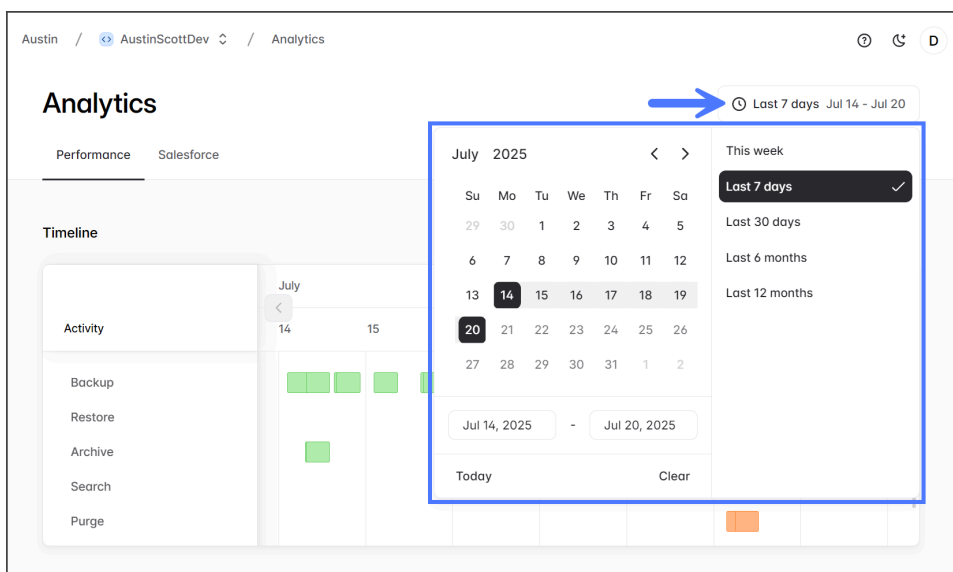


Set Date Range

The range of data displayed in the Analytics section can be adjusted using the **Date Range** box.

i When switching tabs, the **Date Range** will be reset to the default of the **Last 7 days**. The max range is 12 months.

1. Click the **Date Range** box.
2. Use the calendar widget to select one of the predefined ranges or set a custom one.
3. Once selected, the range will automatically be applied.



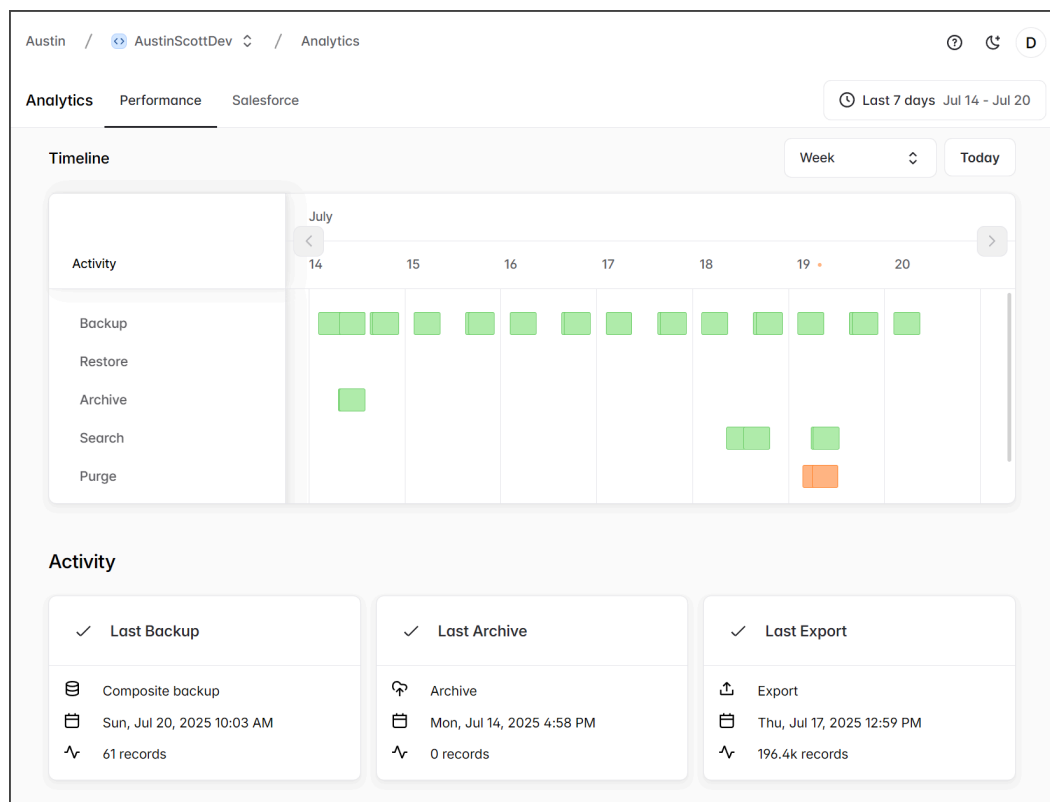
Performance Analytics

The Performance Analytics tab provides you with a timeline view of your Backup & Archive activity.

Timeline and Activity

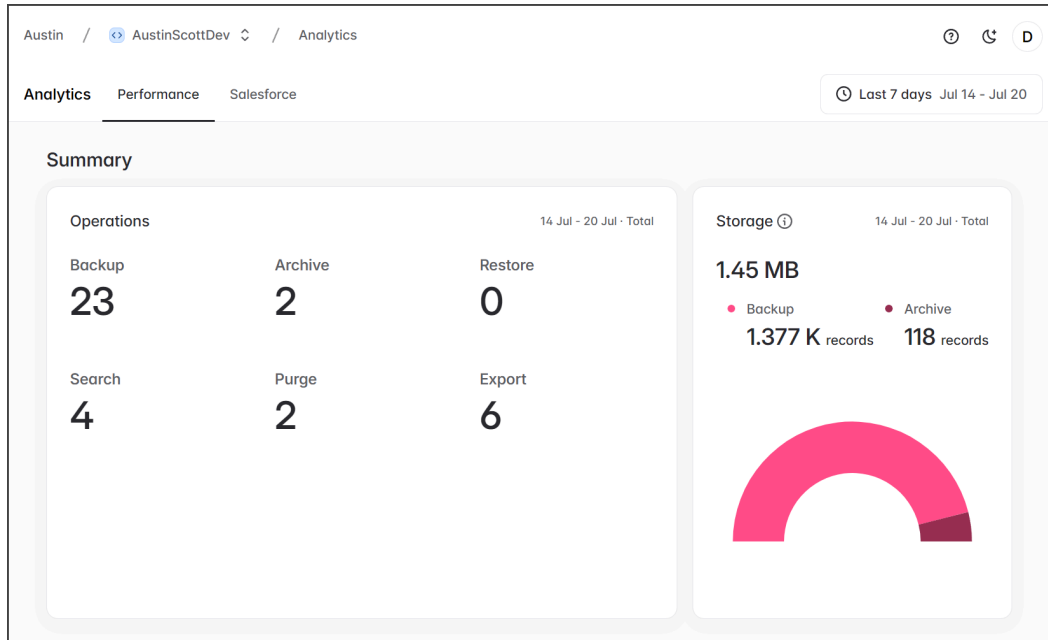
In the **Timeline** chart, you can see when your Backup, Restore, Archive, Search, Purge, and Export actions took place. The timeline can be adjusted by Day or Week.

The **Activity** section displays the most recent Backup, Restore, Archive, and Export operations, along with relevant details.



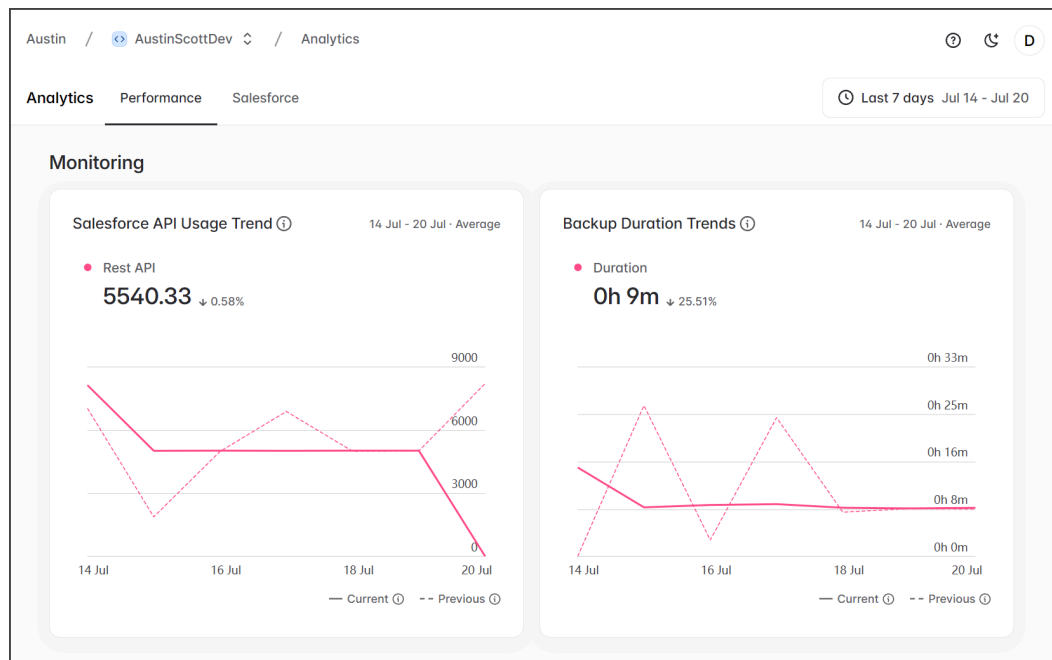
Summary

The summary graphic displays all operations and storage used within the specified date range.



Monitoring

The monitoring charts display your **Salesforce API Usage Trend** and **Backup Duration Trends** over the selected date range. These charts help you identify whether you are exceeding your API limits and track the duration of your backups.

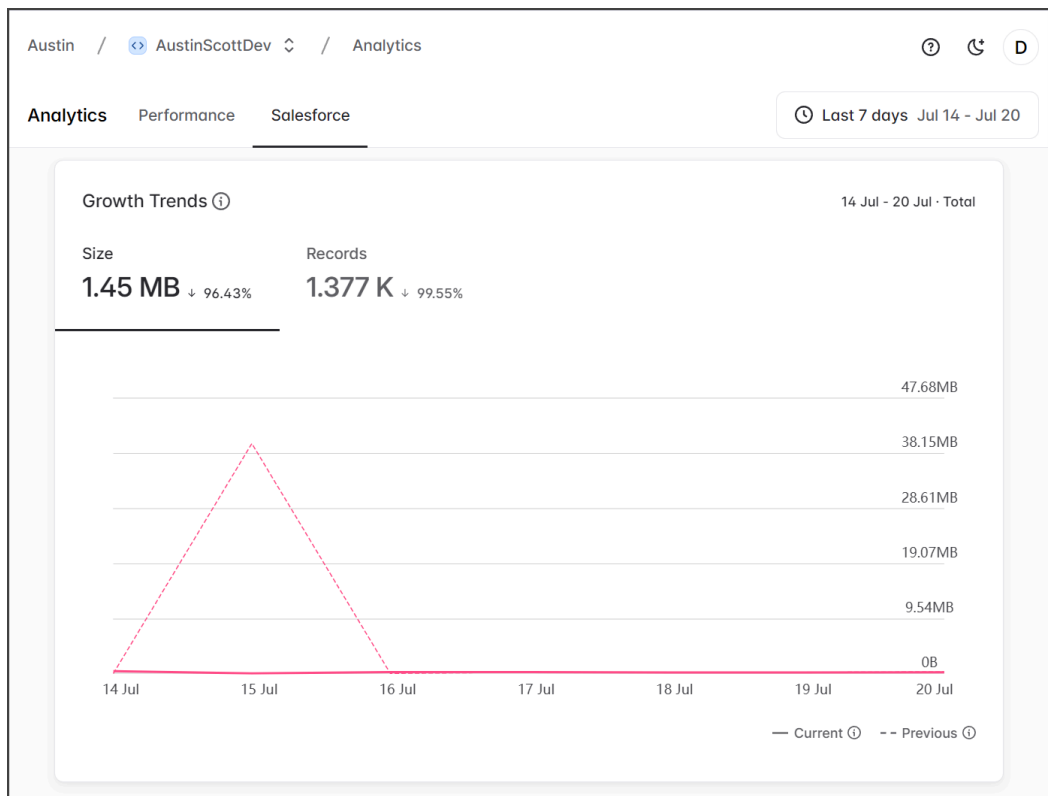


Salesforce

Analyze your Salesforce data changes using the **Salesforce** tab to track data growth trends and identify areas for improvement. This section includes charts that display how your data fluctuates over time, as well as the size and number of records stored in your backups.

Growth Trends

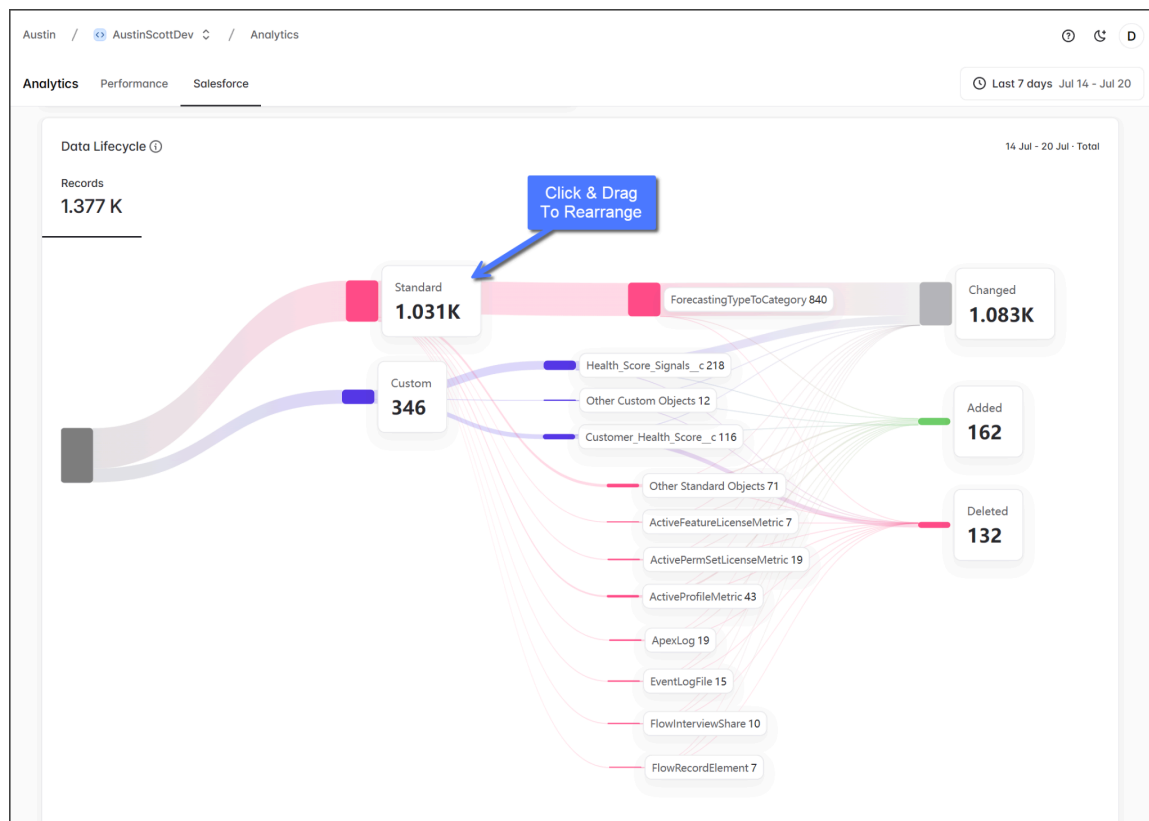
The **Growth Trends** chart displays the size of your backups over time. By default, the duration is set to the last 7 days. You can adjust the date range to show growth trends for different periods, up to the Last 12 months.



Data Lifecycle

The Data Lifecycle chart illustrates the flow of data from your Salesforce Org to your Flosum backup and its evolution over time. This chart allows you to visualize which objects have been created, updated, or deleted, along with the number of records involved, as they are backed up.

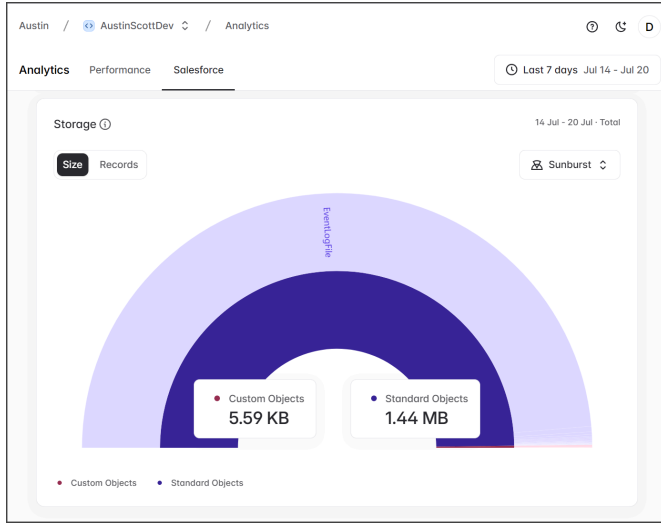
The chart can be rearranged by clicking and dragging a tag to any place on the chart.



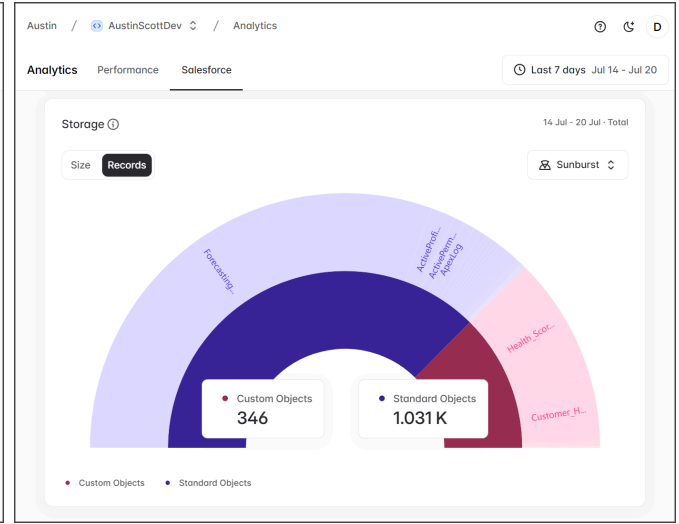
Storage

The **Storage** chart enables you to visualize the size and number of records in your data by using the **Size** and **Records** toggle. You can view the data in two types of charts: **Sunburst** and **Treemap**.

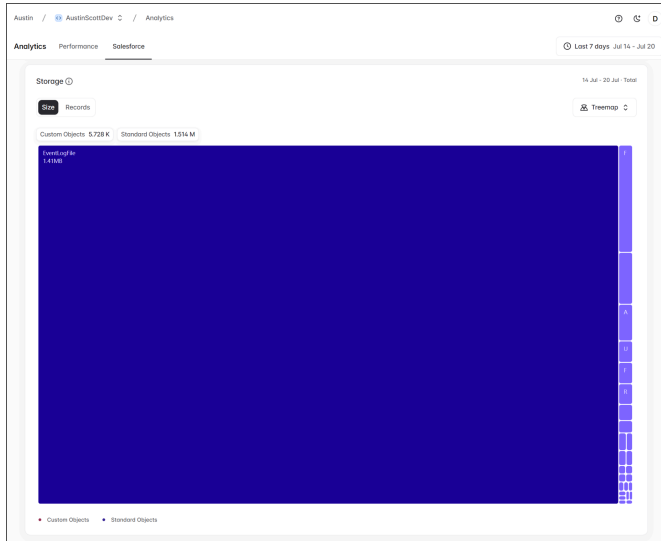
The **Sunburst** chart offers a hierarchical visualization of objects, while the **Treemap** presents a block-style distribution of those objects. The **Treemap** view is handy for identifying the most significant objects in your backup.



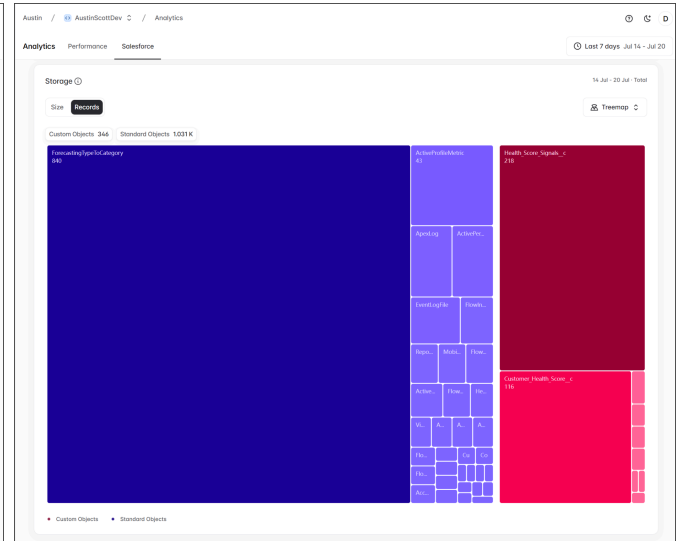
Sunburst - Size



Sunburst - Records



Treemap - Size



Treemap - Records

Security Notes

- Data is encrypted at rest with AES-256 using your key.
- Data in transit is protected by TLS 1.2 or higher.
- Encryption key management remains in your control.
- User authentication supports MFA and role-based access.

Summary of Best Practices

- Use Composite Sync Backup to see incremental backups in action.
- Test restores in a sandbox or with a limited data scope before a full restore.
- Enable job notifications for easier monitoring.
- Explore templated backups for efficiency.

References

- [Flosum Backup & Archive Overview](#)
- [Implementation Best Practices](#)
- [AES-256 Key Generation Guide](#)