



# THE DEFINITIVE GUIDE TO BACKUP FOR SALESFORCE

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HOW TO IDENTIFY AN EFFECTIVE  
SOLUTION FOR KEEPING YOUR DATA SAFE

A woman with blonde hair, wearing a light blue shirt and a pearl bracelet, is sitting at a desk in an office. She is looking at a large computer monitor that displays a webpage with several horizontal lines of text. On the desk in front of her are various items: a white mug, a pen, some papers, and a small glass vase with green plants. The background is slightly blurred, showing other office equipment and a window. The overall lighting is soft and professional.

TOO MANY SALESFORCE  
CUSTOMERS ARE UNAWARE  
OF DATA LOSS GAPS THAT  
LEAVE THEM EXPOSED.

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# WHEN YOUR ORGANIZATION DEPENDS ON ITS SALESFORCE DATA...

It's time to get to know your options for keeping your Salesforce data safe from loss. You may want a clearer understanding of the strengths and weaknesses of different Salesforce data protection options. In fact, you may be surprised at just how different these options are.

Wait, what—doesn't Salesforce protect your data for you?

## Well, yes and no.

Like any SaaS provider, Salesforce is concerned about data availability, reliability, and security. And they're able to protect your data in the cloud from problems on their side of the equation, like a server disk failure, or any other technical issues that may cause data loss, like a natural disaster.

But what happens when the failure is on your end? Like when a junior admin performs a mass data load in error and unintentionally overwrites critical data? Or your Sales management finds key account contact phone numbers have been changed by one digit, thanks to a disgruntled ex-employee's malicious act? Or you unexpectedly discover that a change in field types has altered the data in the fields? Or when an end user accidentally deletes a custom report used by executives? The risks for data loss are real, and endless.

There are several approaches to protecting Salesforce data and metadata (like reports) from these sorts of losses. But recognizing a truly valuable solution—one that can handle both backup and restore equally well—isn't easy. This eBook provides all the information you need to know to identify an effective solution for keeping your Salesforce data and metadata safe.

### WHAT YOU NEED IS A DATA PROTECTION SOLUTION THAT'S DESIGNED TO:

- Protect your Salesforce data and metadata by keeping a copy of all changes, at every point in time.
- Ensure those data and metadata copies can be easily used for restoration.
- Make it easy to restore lost or deleted data and metadata back to its original location or perhaps into another org or sandbox.
- Make it easy for admins to enable end users to self-recover from their own errors.

# THE TRUTH ABOUT DATA LOSS IN SALESFORCE

The latest [EMC Global Data Protection Index](#) report found that 64% of enterprises experienced data loss or downtime in the 12 months covered by the report. Businesses are also experiencing more data losses than ever—400% more on average, or the equivalent of about 24 million emails each. The cost of all this data loss? EMC pegs it at about \$1.7 trillion.

If you think your Salesforce data is somehow immune to this growing problem because it's in the cloud, think again. Data in the cloud is vulnerable to loss, just like data anywhere else. In fact, [IDG](#) reports that 58% of companies that use SaaS applications suffered a data loss incident over a 12-month period.

Or, as [Storage Strategies NOW](#) puts it, "...the dirty little secret of the SaaS industry is that companies lose company SaaS data on a regular basis and most SaaS providers do not offer on-demand data restore capabilities that can be initiated by their customer companies."

Basically, if you have data in the cloud, you're at risk for losing it. Of course, risk isn't the same thing as reality; if you want a good dose of that, read on for the stories of real-life losses some companies have suffered.



58%

of companies that use SaaS applications suffered a data loss incident over a 12-month period.

# LEARNING FROM OTHERS' MISTAKES

No matter what business you're in or what size your organization, the risk of losing data is very real—as the following stories make clear.

## DATA LOSS IN A CHANGE-OVER

"We were doing a major change, merging two different organizations in Salesforce. Although we thought we had prepped for the changeover correctly, we had significant data loss when the data in one Object was overwritten during the merge. It took us weeks to clean up that mess, and we still didn't get everything back that we lost."

## DATA LOST TO FIELD CHANGE

"We changed our Country field from a text field to a picklist. Because reps had previously entered "US," "USA," and similar, and we didn't map those to the picklist...not only did we lose our previous data, the territory assignment rules we had were completely borked by the data loss. Trying to fix this made for a horrible month."

## DATA TRUNCATION

"We had a Long Text Area Field that reps used to keep Contact notes. A new admin updated that field to a Text Area, and thus truncated the data to just the first 255 characters—this meant we lost details our sales reps said they relied on, and the screaming is still going on."

## DATA OVERWRITE

"We created a custom Opportunities report our Executive Team uses in their weekly planning meeting. Over the weekend, one of our sales managers thought they were making a copy of the report from the current report to customize it - but they really had overwritten the current report in error by clicking "save" instead of "save as." By the time they noticed, they couldn't undo their changes - and the weekly meeting was spent trying to recreate the report, and its data. It took two weeks before things were back to good."

One of these cases at least had a happy ending—but only because the company had third-party backup in place that enabled them to uneventfully restore the lost data. We'll talk more about third-party tools later in this eBook. We'll also talk in the next chapter about the tools Salesforce offers for data protection, including what they do and don't cover, and what they can and can't do.

## Limited assistance from Salesforce

It's not that Salesforce doesn't have robust technology in place for protecting data in the cloud; it's just that the technology, like that of most SaaS application vendors, is designed to protect against losses originating on their side. In the case of Salesforce, that protection is retained only for 90 days. As [Forrester](#) reports:



All customer data is automatically backed up to a tape library on a nightly basis. Backup tapes are cloned to an off-site facility to verify their integrity, and the clones are stored in a secure, fire-resistant location at that off-site facility.

Rachel A. Dines

**"BACK UP YOUR CRITICAL CLOUD DATA BEFORE IT'S TOO LATE," FORRESTER**

That's fine if Salesforce suffers a data center failure—but doesn't help much if the failure is instead yours. Salesforce does offer client companies an option for recovering data that's been lost, but it is limited in scope and resource intensive, as explained in the next section.



MOST SAAS PROVIDERS  
DO NOT OFFER  
ON-DEMAND DATA  
RESTORE CAPABILITIES  
THAT CAN BE INITIATED  
BY THEIR CUSTOMER  
COMPANIES.

—  
Storage Strategies NOW

# THE TOP 5 REASONS YOU NEED BACKUP FOR SALESFORCE

## 01

### HUMAN ERROR

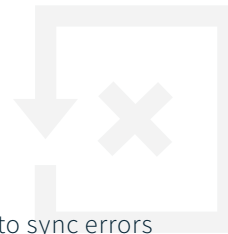
Whether it's accidentally deleting a custom object or inadvertently overwriting data when using the Data Loader, human error is the leading cause of data loss in SaaS applications. It accounts for a whopping 64% of data loss incidents, according to [Aberdeen Research](#).



## 02

### SYNC ERROR

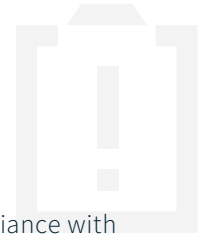
A data loss can occur due to sync errors that happen when you're doing anything that requires data synchronization—such as working with a remote Salesforce development team in a different timezone, or using Outlook for Salesforce, or in almost any other app-to-Salesforce integration.



## 03

### COMPLIANCE

Loss of data can lead to non-compliance with regulations across a number of industries. For example, regulations governing data privacy like HIPAA in the healthcare field—may be violated if data is maliciously altered or deleted in error.



# THE TOP 5 REASONS YOU NEED BACKUP FOR SALESFORCE

## 04

### INSIDER THREAT

Data loss incidents caused by people working inside companies, rather than by outside hackers, make up 23% of all electronic crime events, according to the [CERT Insider Threat Center](#) at Carnegie Mellon University's Software Engineering Institute.



## 05

### BUSINESS CONTINUITY

How much does your organization depend on the data and metadata in Salesforce? How much impact would there be if forecasting reports, or open Opportunities, were lost or overwritten in error? You've invested in Salesforce — now you need to protect your investment.



# SALESFORCE'S NATIVE RESTORE SOLUTION

## Salesforce Data Export

This is the main [backup tool](#) available from Salesforce to help protect your data. It's a manual process that you do on a weekly or monthly basis. While it's free, it is not without its limitations:

- **Labor-intensive.** Because Salesforce Data Export is a manual process, it can take a lot of work. An email is sent with a link to that week's export; if the recipient is out on vacation, it's easy to miss. The link expires in roughly 48 hours, so it's easy to miss out on a full week of protection. And then the zipped files must be downloaded, then uploaded to backup systems large enough to hold them—not trivial for a larger organization.
- **Storage costs.** You have to move your data to local storage every time you perform the process. That can lead to considerable storage costs, depending on the size of your organization.
- **Limited to weekly updates.** A lot can happen in a week, thanks to new lists, customizations, and other changes. We found that the average Salesforce domain has [26,000 changes per day](#). And if you're only backing up data once a week, you run the risk of losing all the changes made since your last backup.
- **Doesn't include metadata.** Salesforce Data Export doesn't save customizations, formatting, and other metadata. So in addition to the time you spent exporting files, you'll have to spend plenty of time recreating your customizations if you have a loss.

- **Doesn't provide restore capabilities.** When it comes to getting your data back into Salesforce exactly the way you had it before a loss, you're on your own. You'll spend hours or days or weeks locating your files, downloading them, and then sifting through all the data to find what you lost and manually uploading it back into Salesforce.

As one [Salesforce admin](#) put it, "Salesforce manual export solves the need for data export at a very basic level, but you quickly realize its limitations. The process is not only time-consuming, but doesn't offer much granular control. It also doesn't provide any method of restoring that data."

### Is that all there is?

If you're looking for help to get your lost data back, the options above are the main native tools Salesforce provides. But don't stop looking, because there is another way—third-party cloud-to-cloud backup. Take a look at the next section to learn more.

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—  
Salesforce Admin

# KEY CONCEPTS IN SALESFORCE DATA PROTECTION

## SPANNING BACKUP FOR SALESFORCE

Salesforce's native options for cloud data and metadata protection are limited, but a third-party cloud-to-cloud backup solution can fill the gaps. In fact, Salesforce recommends their customers use third-party backup [here](#). Third-party backup that is cloud-to-cloud will give you the ability to keep a copy of your Salesforce data and metadata in a separate cloud in case the original data or metadata is destroyed, damaged, or deleted. When you're already operating in the cloud, saving a copy in the cloud is more secure, and more efficient, than moving it back to on-premise storage.

There are a few key concepts to keep in mind during your search for the right cloud-to-cloud backup solution for your organization. Read on to learn what you should know before beginning your search.

### **Backup and archive are two different things**

Know what you're looking for: a solution for backing up data—not archiving it. A backup copy is something that exists for the express purpose of making data available and recoverable in the event that it's no longer accessible in its original form. An archive addresses a completely different need; it exists to preserve and retain your data for the long term to meet compliance or legal requirements, and simply isn't designed for data recovery. Unlike a backup, with multiple point-in-time snapshots, an archive is a single, immutable capture. And that's fine, since archives are used to meet compliance or legal needs. But it does mean that an archive solution will still leave your organization at risk if you lose data. Archives are not built for fast restores, and they don't help business continuity.

## Backup is one thing, restore is everything

The most important thing to understand about backup solutions is that backup is only half of the equation. Being able to restore the data and metadata you've been backing up is the other half. So while you need a solution that makes backup quick and easy, you also need a solution that makes restoring and managing data and metadata equally effortless. Otherwise, there's not much point in having it. In your quest for a solution, you'll run across some that may offer a relatively simple way to do backup—but then require you to go through a cumbersome, time-consuming process to get back the data you lost.

## Data recovery isn't the same as data restore

Recovery simply means you get your data back—not that you get it back exactly the way it was. Recovery can refer to recovering and exporting all the versions of your backed-up cloud data, requiring you to spend a lot of time and effort finding the specific previous version of what you lost, or to rebuild your file structure, or to manually import data back into Salesforce. Restore means accurately and automatically returning data back into Salesforce exactly as it was before you lost it. Backup solutions that merely retrieve all your backed-up data, leaving you to sort through it all, are of limited value.

Keeping these concepts in mind, you're ready to find the cloud-to-cloud solution that will work best for your company. Turn to the next section where you'll find a checklist to use to be sure the solution you've found has all the features and functions you'll need.

Salesforce recommends that you use a partner backup solution that can be found on the Appexchange.

—  
Salesforce Knowledge Article #3594

# 4 THINGS TO LOOK FOR IN A CLOUD-TO- CLOUD BACKUP SOLUTION

These are the high-level requirements to consider when you evaluate a cloud-to-cloud backup solution for Salesforce. Read on to learn more about each.

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## 01 RESTORE CAPABILITIES

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## 02 COMPREHENSIVE TRANSPARENT BACKUP

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## 03 EASE OF USE

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## 04 SECURITY AND COMPLIANCE



## 01

## RESTORE CAPABILITIES

**GRANULAR DATA RECOVERY OPTIONS**

Be sure you have the option to restore anything, quickly and automatically, from a single field of a record to multiple records including master-detail records with relationships intact. You should be able to restore specific fields for updated records, as well as overwrite specific field values. Also check that you can restore from one org into another - or even seed Sandboxes - so that you have full control over virtually any restore scenario.

**TIGHT INTEGRATION WITH SALESFORCE FOR SIMPLER RESTORE PROCESSES**

Look for a solution that runs inside Salesforce, so the Roles, Profiles, and Permission sets are reflected in the access to what can be restored by whom. With an in-app solution, backup and restore can be as easy and familiar as the Salesforce UX. And if you are exploring or using Salesforce Lightning, make sure the solution is certified by Salesforce as Lightning Ready.

**END USER RESTORES, IF ADMINS ALLOW**

Find a solution that gives admins the option to empower end users to restore data they deleted or overwrote in error. Make sure it's in-app, so Roles, Profiles, and Permissions are reflected in restore access. This can free admin time in managing end user support.

**ACCURATE RESTORE OF POINT-IN-TIME DATA AND METADATA BACK INTO SALESFORCE**

A good backup solution should be able to retrieve data from any specific point in time and then automatically restore it directly back into Salesforce with no manual effort. It should be able to store the most recent or any previous point-in-time version with 100% accuracy and also restore metadata such as Reports, Dashboards, Objects, Layouts - and more.

**RAPID RESTORE TIMES TO MEET FAST RTOS**

To avoid downtime after a data loss, you need to achieve the fastest recovery time objectives (RTOS) possible. This requires a backup solution with restore processes that involve a minimal number of steps and that can be done by someone with no special training.

**CROSS-ORG RESTORE AND SANDBOX SEEDING**

To save significant admin and developer time, look for a backup and restore solution that enables data and metadata from one Salesforce org to be restored to another (also known as "Sandbox Seeding")—such as from Production to a Sandbox, or vice-versa. You also may want a solution that can automate anonymization of sensitive information while seeding Sandboxes, and one that provides the option to restore related child records.

## 02

## COMPREHENSIVE, TRANSPARENT BACKUP

**FIELD-LEVEL FILE PROTECTION**

Every object should be protected individually, so that single errors don't cause an entire backup to be corrupted and lost. Make sure that your backup solution treats every object as a unique entity and not just part of a larger batch file.

**DEDUPLICATION**

If a record hasn't changed since the last time it was backed up, there's no need to waste bandwidth backing it up again. Backing up every single piece of data you have every time puts a heavy load on bandwidth, slowing operations and increasing the chances of a network crash.

**BACKUP STATUS REPORTING**

Knowing the status of your Salesforce backup process can help you identify any issues with your backups and address the issue before it impacts your ability to restore your data. A backup provider that enables you to see whether there were any problems with your backups demonstrates a commitment to ensuring your confidence in how well your Salesforce data is protected against loss.

**DATA RETENTION AND STORAGE**

Some solutions charge based on storage; some charge for unlimited retention. Ideally, you should find a solution that does not charge for either unlimited storage or unlimited retention.



64%

OF DATA LOSS INCIDENTS ARE  
CAUSED BY HUMAN ERROR.

ABERDEEN RESEARCH

## 03

## EASE OF USE

**BY ADMINS AND DEVELOPERS, FOR ADMINS AND DEVELOPERS**

A backup solution should require minimal to no training to use. It should be designed with admin and developer input, so using it is intuitive and easy - from start to finish - and it should just work.

**AUTOMATIC DAILY, MANUAL ANYTIME**

To ensure your data is always protected, you need a solution that automatically backs up. To ensure your data is protected before any major change, you need a solution that enables manual, on-demand backup. The best solutions will perform all of that in-app, so administrators never need to leave their Salesforce environment to manage and monitor backups.

**EASY TO MONITOR**

An ideal solution for backup will support Chatter notifications of backup status, provide auditable records of all actions taken within the solution, and will provide a customizable dashboard for admins in-app.

### SECURITY CERTIFICATIONS

An external security certification indicates that a neutral third party has conducted a thorough evaluation of the solution provider's business and coding practices. Look to see that:

- The backup provider has completed an **SSAE 16 SOC 2 Type II** audit, which indicates meeting rigorous security standards for infrastructure, software, employee access, procedures, and data handling

### ENTERPRISE-GRADE PROTECTION

Larger organizations, or those with specific data protection requirements, need to be sure their backup solution supports:

- Customer management of encryption keys as an option
- The ability to select a data center in a specific region as a backup destination
- In-app access, to control access to those profiles and permission sets established within your Salesforce org

### DATA PRIVACY PROTECTION

To meet data privacy needs, a backup solution needs to:

- Provide the option for self-management of encryption keys
- Support e-PHI privacy mandates via HIPAA compliance
- Encrypt data using SSL and 256-bit AES object-level encryption technology
- Retain document security metadata so that restored documents have the same level of protection as the original
- Be fully compliant with the EU General Data Protection Regulation (GDPR)





### ALIGNMENT WITH COMPLIANCE REQUIREMENTS

The regulatory and compliance mandates that govern data availability don't necessarily mandate backup and restore capabilities, but they do require organizations to keep information available—and that makes the ability to restore data critical. A solution that operates within the **COBIT** framework of standards for compliance will help ensure compliance.



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

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