

3-STEP GUIDE TO PROTECTING DATA & METADATA IN SALESFORCE

Whether an application sync overwrote good records, or an admin made a change that caused data loss, or a developer accidentally deleted critical metadata, or anything between, you need to be able to act fast to get your data and metadata back. Salesforce offers native tools to help, but even [they recommend](#) resolving the problem much more quickly and easily with a third-party backup solution. **Follow this 3-step guide to protect your data and metadata in Salesforce.**

STEP 1: KNOW WHAT YOU'RE UP AGAINST.

Be aware of the five most common scenarios for losing data and metadata in Salesforce:

Data loader trauma: Make just one mistake when loading data into Salesforce, and you risk overwriting enormous amounts of data in error.

Failed third-party integration: Add a collaboration or productivity tool, and you could lose data to a sync error or automatic data updates in error.

End user error: Your end users make a serious error in updating data they have rights to modify? The data could be gone for good.

Malicious data loss: Watch out for rogue users who intentionally overwrite critical data such as customer contact information, or rogue admins who can do even more damage.

Deployment issues: It's easy to lose data or metadata in deployment or configuration changes, and the time spent getting back to good can be significant.

STEP 2: KNOW YOUR NATIVE SALESFORCE TOOLS.

If you suffer one of the catastrophes above, be sure you're familiar with the tools Salesforce offers to recover data and metadata.

Data export service: Export data via links from Salesforce to a .csv file – these links are live for just 48 hours, do not include metadata, and the data is a week or more old. If you need it, Salesforce's own Data Recovery Service will only go back 90 days. (You can also try using reports in Salesforce to manually back up data more often.)

Data loader: Use the data loader to manually reload data – without metadata – after a loss. (You can also leverage change sets to incrementally refresh configurations for recovery purposes.)

Force.com IDE: Technical skills and developer experience are both required to use Salesforce's native tools for metadata restore.

STEP 3: KNOW YOUR DATA PROTECTION ALTERNATIVES.

Simplify and speed-up backup and restore by supplementing with a third-party backup and recovery solution. Look for these capabilities:

Reliable, granular restore: Look for and test for the ability to quickly and fully restore data and metadata from any point in time after a loss. Does the solution provide the granular level of control you need for both data and metadata restoration?

Ease of use: Look for a solution that's easy to use from start to finish, whether the user is a new admin, an experienced admin or developer, or even an end user.

Automated backups and restores: Seek solutions that not only automate backups and complex restores of data and metadata, but make the restore process transparent.

Security and compliance features: Check for security certifications, data privacy features, the option to self-manage encryption keys and data sovereignty protections.

SALESFORCE TOOLS OR THIRD-PARTY BACKUP: WHAT'S THE DIFFERENCE?

DATA & METADATA BACKUP

With Salesforce Native Tools Only

Export service

- 48-hour access window
- Only goes back 90 days
- No metadata - needs Sandbox & Force.com IDE for manual metadata restore

With the Right 3rd-Party Solution

Automated backup

- Automated backup of data & metadata, at a time of your choosing
- Restore easily from any point in time
- Backup on demand, before making changes or integrations

DATA & METADATA RESTORE

With Salesforce Native Tools Only

Data loader and Force.com IDE

- Manual reloading of exported data - data preparation and specific order of reloading required
- Metadata reconstruction required, technical skills and experience required

With the Right 3rd-Party Solution

In-app restore

- Automatic restore of data and metadata - including cross-org restores to Production or Sandbox orgs
- Data restore options to preserve master-detail, parent-child relationships
- Easy restores of permanently deleted items
- Option to enable end users to self-restore
- Restore metadata in a couple of clicks without using 3rd party tools

ABOUT SPANNING

Spanning Cloud Apps, a Kaseya company, is the leading provider of backup and recovery for SaaS applications, protecting more than 10,000 organizations from data loss due to user error, malicious activity and more. **Learn more at spanning.com.**