



# The Complete Data Backup and Recovery Guide for Salesforce



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# Why Back Up Your Salesforce Data?

At Salesforce, trust is our number one value, and we invest heavily in the security of our cloud infrastructure to maintain your trust. Our role in the [shared responsibility model](#) is to provide reliable access to data and systems. As a customer, you're responsible for auditing and monitoring data access, permissions, and usage, and ensuring that your data is available to your business.

Implementing a backup and recovery strategy is critical to fulfilling this responsibility and maintaining the integrity of your Salesforce data.

## Top Causes of Data Loss and Corruption

Here are some of the most common culprits behind data loss or corruption scenarios that can occur in your Salesforce org:



### Human Error

No matter how well you protect your org from external threats, it can still face vulnerabilities from within. Even the most skilled or experienced users can make mistakes that compromise data integrity or accidentally leave the door open for hackers.

Suppose that you ask one of your admin users to clear old files from your customer data. A slip of the finger could lead to the accidental deletion of relevant datasets like transaction history or communication preferences.

Another human cause of lost data involves accidentally overwriting existing information. This mishap can occur when users update records or import new data.



### Integration Issues

Third-party tools that connect with Salesforce through an API might lead to data conflicts or even overwrite critical information. Another integration problem can emerge during syncs. Also, if your apps aren't syncing data correctly, incomplete data transfers can happen.



### Cybersecurity Threats & Attacks

Cyberattacks are an ever-present concern for any organization that uses cloud-based SaaS solutions. A successful hack could lead to a prolonged outage and large-scale data loss. Hackers may gain unauthorized access to your data and delete records.

Cybercriminals often target SaaS platforms through sophisticated social engineering and phishing attacks. These tactics allow them to steal login credentials and MFA tokens, and potentially infiltrate the platform without detection.



# Key Requirements to Validate When Choosing a Salesforce Backup Solution

## Areas to consider:

- Centralized, secure access to backups for multiple orgs
- Backup coverage for data, metadata, files, and attachments
- Backup frequency: continuous, daily, or on-demand
- Backup retention on daily, weekly, monthly, yearly, or longer schedules
- Proactive monitoring for anomalies, including loss and corruption
- Tools to analyze the extent and timing of loss or corruption
- Tools to filter and restore with surgical precision, down to the field-level
- Rapid and reliable restoration, including relationships and child objects
- Detect schema changes automatically and include in backups

# DIY Data Backup Options

## Data Export Service

The Data Export Service will produce a weekly or monthly set of comma-separated value (CSV) files for the standard and custom objects you specify. These files must be manually downloaded each week within 48 hours of receiving the download link. It's then your responsibility to store the files in a secure location, and in an organized manner.

Below are the six key steps to follow in order to recover lost data from Weekly Export .zip files. You'll need to be familiar with Microsoft Excel functions to perform critical steps within this process.

1. Identify the size of the damage
2. Isolate missing data
3. Create restore files
4. Create custom external ID fields
5. Prepare to delete record files
6. Restore files in the correct order using Data Loader

### Additional Considerations When Using the Data Export Service:

- It can only run once a week or once a month, not daily or hourly.
- Metadata is not included in the files.
- You only have a 48-hour window to download the files.
- It's difficult to find data if you don't know exactly when it was lost.
- Downloading the files can be a manual, time-consuming process.
- Storing CSV files in the wrong place could create an IT security risk and might not meet stringent regulatory compliance standards.
- The actual files can be large and numerous, making them cumbersome to manage.
- You have to spend resources on a location to store the files.



## Report Exports

Using the reports interface, Report Exports allows you to export Salesforce data into a spreadsheet via Microsoft Excel (.xlsx or .xls) files or CSV files. This backup method is native and easy to use, but it doesn't provide the ability to export historical trending reports.

## Do-It-Yourself Salesforce API Backup

We provide Application Programming Interfaces (APIs) for running programmatic operations on data and metadata. These APIs include a library of commands for interacting with your data in Salesforce, allowing you to extract, update, upsert, and insert data to and from the platform. While you can use these commands to build your own backup solution, there are several important considerations and complexities to keep in mind, including:

- Hidden costs, including maintaining code and on-premise storage.
- Difficulty of identifying changes or deletions across backups.
- Restoring data while maintaining parent-child relationships.
- Ability to restore at any level of granularity without overwriting unaffected data.
- Keeping up with three API releases a year requires constant innovation.
- Supporting backup and recovery for metadata, attachments, table data, Chatter, and custom objects.
- Maintaining resource-intensive maintenance and management processes.
- Manually updating the backups every time the schema changes. If developers don't realize the schema changed or don't realize they have to update the backup policy manually, they won't be protected against data loss or corruption events.

The opportunity cost incurred for attempting to implement your own API backup and recovery solution is high. It could waste weeks to months of your employees' time as they try to develop, maintain, monitor, troubleshoot, and store your backups. The inability to restore the intricate relationships between objects, including child objects and files/attachments, makes it much more difficult for a business to resume normal operations after a data loss or corruption incident.

## Data Loader

This client application, which is installed separately, enables you to export bulk records to CSV files. While it easily integrates with the Salesforce Platform, the manual steps can be time-consuming and don't support exporting attachments.

## Change Sets

With change sets, you can copy metadata from one Salesforce org to another by creating an outbound change set. Backing up metadata via change sets requires several steps, which can add time to the process. There's also no rollback functionality, meaning that all changes in the source org must be manually reversed, lengthening the process.

## Full Sandbox Refresh

Full sandboxes are copies of your entire live Salesforce environment, including all its data and metadata. While some admins use their full sandbox as an ad-hoc backup solution before major data alterations or app integrations, you may encounter some challenges when using this as a backup tool:

- Only refreshes every 29 days
- Could take anywhere from a couple of days to a week to refresh
- Refreshes need to be submitted manually
- No historical backups
- Manual restore, similar to the Data Export Service
- No metadata restore
- Difficult to identify a data loss

# Automated Backup and Recovery

## Salesforce Backup & Recover

Salesforce Backup & Recover is the most comprehensive backup and recovery solution for Salesforce and ensures your data is always protected and available when needed. With automated backups, proactive notifications, and granular restoration tools, you can safeguard your data from unexpected events, ensuring business continuity and minimal downtime. Backup & Recover has ISO 27001, ISO 27701, SOC 1 & SOC 2 security and privacy certifications, and is FedRAMP Authorized.

## Why Salesforce Backup & Recover?

### Capture Every Data Change to Protect Rapidly-Changing Data

Generate on-demand backups at specific points of time in the past, immediately before and after incidents, to avoid the potential of unrecoverable data.

### Protect Data With Automated Backups

Protect your mission-critical Salesforce data with automated daily backups of everything that's important to your organization including metadata, files, attachments, managed packages, Sandboxes, and more.

### Detect Unusual Data Activity With Proactive Alerting

Quickly identify data loss or corruption in your org. Easily detect unusual data activity in your backups with proactive alerting sent directly to your email.

### Accelerate Recovery by Precisely Restoring Affected Data

Visually inspect, and compare data to identify affected data. Isolate and precisely restore only the affected objects, fields, and records.

Requirement	Backup & Recover	Other Options <sup>1</sup>
<b>Centralized secure access for multiple orgs</b>	SaaS solution allowing authorized and audited access to backups for multiple orgs and Sandboxes. ISO 27001, ISO 27701, SOC 1 & SOC 2 security and privacy certifications, and is FedRAMP Authorized.	Ad hoc and time-consuming, cumbersome to manage. Storing backups in the wrong place could create an IT security risk and might not meet stringent regulatory standards.
<b>Backup coverage</b>	Data, metadata, files, attachments, managed packages, Sandboxes, and more.	Metadata not included.
<b>Backup frequency</b>	Continuous, daily, or on-demand.	Only run on-demand (e.g., weekly monthly, not daily or hourly).
<b>Backup retention</b>	Daily, weekly, monthly, yearly, or longer.	Only 48-hour window to download the files, and no historical data.
<b>Detect anomalies</b>	Proactive monitoring for anomalies, including Visual Graph and Smart Alerts.	N/A
<b>Rapid and reliable restoration</b>	Fast and comprehensive recovery, including relationships and child objects.	N/A
<b>Analyze extent &amp; timing of incident</b>	Visually inspect, and compare data to identify affected data.	It's difficult to find data if you don't know exactly when it was lost.
<b>Surgical precision restoration</b>	Isolate and precisely restore only the affected objects, fields, and records.	N/A
<b>Detect schema changes automatically</b>	Automatically detect schema changes and update backups to protect new data.	N/A

<sup>1</sup>Limitations may vary by method. These reflect the most common issues across native Salesforce backup options.

### Third-Party AppExchange Options

While Salesforce's native backup and recovery options can be helpful, they may not cover all your needs, especially for larger or more complex organizations. Third-party solutions from the AppExchange typically provide more comprehensive features, such as automated backups, granular data recovery, enhanced security, and user-friendly interfaces.



### Learn more about Salesforce Backup & Recover

Visit our [Backup & Recover](#) page or contact us at [1-800-667-6389](#) to learn more.



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