

# Checklist: Salesforce Backup and Restore Vendor Capabilities

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# Evaluating backup and restore vendors for your Salesforce org? Here's what you need to look for.

If disaster strikes, you need the confidence of knowing that your mission-critical Salesforce data is protected and can be fully restored. That's why choosing the right backup and restore vendor can make or break your Salesforce implementation if you experience a data loss or compromise.

If you are in the process of evaluating options to implement a backup and restore solution, consider the questions on this checklist. You'll learn the critical requirements for seven key categories so you can make the right choice for your organization's data protection needs:

- ① **Security**
- ② **Automation & Customization**
- ③ **Cost**
- ④ **Backup and Restore Completeness**
- ⑤ **Performance**
- ⑥ **Ease of use**
- ⑦ **Expertise**

# Security

- ☐ Is the solution compliant with your industry regulations and your IT security policy?
- ☐ When a vendor employee with root access connects to the production database, can she see your data in clear text?
- ☐ Are your backups logically and physically segregated from Salesforce (i.e.: independent from the source system?)
- ☐ Can you encrypt the data in your backups with your own encryption key? With a different key per org? Can you rotate this key?
- ☐ Are the backups encrypted at rest? At the disk-level? At the OS-level? Granularly at the field/column/file-level?
- ☐ Is the data in transit encrypted via HTTPS/TLS1.2?
- ☐ Does the vendor offer a key management system that is managed by you, not them, so that you can control, remove, and track access to the encryption key?
- ☐ Can you set different retention periods per data classification (personal data, personal health data, financial information)?
- ☐ Where is your backup going to be securely stored? Which country, cloud or premises?
- ☐ What kind of authentication process is in place to access the service? SSO? 2-factor? IP restriction?
- ☐ How long is the backup retained before deletion? Is this period compliant with your policy?
- ☐ Is the average annual expected backup loss (commonly known as backup “durability”) compatible with your requirements?
- ☐ Is the uptime of the backup and restore system availability acceptable?
- ☐ Does the solution support access for multiple admins with a division of duties?
- ☐ Can you access audit logs to identify who connected to the system and what operations were executed?
- ☐ Can you pull these logs automatically from your internal log management system (SIEM)?
- ☐ Is there a “panic-button” to remove access to all historical backups? From admins? From vendor personnel? How fast is the access removed?
- ☐ In a multi-org context, can you control org visibility for all the admin users?

## Automation & Customization

- ☐ How much manual operation is required?
- ☐ How often can you schedule operations? Hourly, daily, weekly, monthly, yearly?
- ☐ Does the solution allow you to limit the impact of this frequency on your Salesforce governor limits?
- ☐ To further optimize API requests and mitigate governor limits, can you duplicate backed up data to external connectors?
- ☐ Can you launch manual backups (on demand)?
- ☐ Does the solution support full, synthetic, incremental, and partial backups?
- ☐ Does the solution require you to change your Salesforce configuration (e.g., add external IDs to your Salesforce objects)?
- ☐ Does the solution require you to update the backup plan if you create a new custom field or a new custom object?

## Cost

- ☐ Do you need to invest in infrastructure (storage, server, etc.)?
- ☐ Do you need to purchase licenses (database, middleware, backup solution, etc.)?
- ☐ Are there solution initialization/development costs?
- ☐ Are there maintenance/run costs?

## Backup and Restore Completeness

- ☐ Does the solution support the latest Salesforce release?
- ☐ Is the solution multi-org compatible?
- ☐ Does the solution backup data, files and metadata?
- ☐ Is the solution able to quickly restore a single record?
- ☐ Does the vendor offer audit reports and data monitoring notifications for detecting anomalies?

- Is the solution able to maintain at least 30 levels of relationship while restoring?
- Is the solution able to restore a full Salesforce org, and be used in the context of a Salesforce organization clone or organization copy project?
- Does the solution support mass deletion of records for rollback requirements?
- Does the solution support deactivation of triggers and automations to minimize data transformation during restore process?
- Does the scope of the Salesforce objects supported by the solution align with your Disaster Recovery Plan?
- Does the solution support data restoration across different Salesforce environments (Example: Test a restore process in a full sandbox)
- Can the solution help you anticipate data quality issues that may block the restore process?
- Can the solution help you to anticipate differences between schema and data backup (compare the content with the container) that may block the restoration process? Will a removed object, or deleted field, block the process?
- Does the solution measure the success of your restore process (integrity testing) by identifying differences between data contained in the backup and data available in Salesforce after the restoration?
- Can the solution automatically detect a potential data loss? Can you set up notifications?

## Performance

- Does the solution support multiple Salesforce APIs (REST, SOAP, Bulk, Metadata)?
- Does the solution support the Bulk API PKChunking header?
- Are you able to measure how many API calls are needed for a full backup, and is this number compatible with your Salesforce governor limits?
- Can you make parallel backup requests, customize the degree of parallelization, and optimize the SOQL queries to improve performance? (For more information, check the Complete Guide to Salesforce Backup & Restore by Odaseva.)
- Does the solution integrate a retry strategy and does it comply with your security policy? (For more information, check the Complete Guide to Salesforce Backup & Restore by Odaseva.)
- Does the vendor offer analytics dashboards and/or reports that track usage (file storage, data storage, API calls etc) and predict when you'll reach capacity limits so that you can avoid service degradation and overspending on resources?

## Ease of use

- Is the solution intuitive enough for your Salesforce administrators ?
- Is it easy to restore, or download, specific data, files or metadata (related to an object, time range, etc.)?
- Does the vendor offer audits that indicate whether you will have any roadblocks when restoring data, such as access to permissions?
- Can the solution accommodate multiple modes of consumption, in accordance to all of its uses: in Salesforce? Dedicated Web App / UI? API? CLI?
- Does the vendor offer dashboards that give visibility into backup plan jobs running, job details, contract limits, etc?
- Is training or self-service support available?
- What's the "ramp up" time to learn to use the new system?

## Expertise

- Does the solution include a Managed Backup Services team you can rely on to monitor backups and optimize their performance?
- Does the solution give you access to an Expert Services team that can guide your through your Salesforce Disaster Recovery Plan implementation (methodology, process and solution)?
- Are the people you are talking to certified with the highest level of data certification by Salesforce: Salesforce Certified Technical Architect (CTA)? Check CTA certifications at [certification.salesforce.com](https://certification.salesforce.com)

# About Odaseva

Odaseva is the leading Enterprise Data Platform for Salesforce. Designed for large data volumes and complex data models, Odaseva offers Salesforce architects and platform owners the most powerful tools available to solve the problems at the foundation of the Salesforce data value chain: data protection, data privacy, and data agility.

Global industry leaders like Schneider Electric and Manulife rely on Odaseva to ensure business continuity, respect customers and regulators, and easily move Salesforce data to any environment or system where it can deliver value—with the strongest security, performance, and expertise available.

**Learn more at  
[odaseva.com](https://odaseva.com)**

**UPDATED MARCH 2025**