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The Ultimate Salesforce Data Recovery Guide

A.K.A Oops, I did it Again! Please Admin help me recover my Data!

Discover Native and Third-party Solutions for Salesforce Backup and Recovery

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Salesforce has witnessed a huge growth in adoption driven by the COVID lockdowns and the shift to a remote workforce. Thus adding to its already substantial numbers. Its revenue in 2021 grew by a whopping 24% to $21.3 billion.

With the en masse shift of business-critical data to Salesforce, it has become all the more important to have a safety net to protect Salesforce from data loss. This is especially true given the security vulnerabilities of the remote/hybrid workforce. Hackers have been capitalizing on them - the FBI has seen a 400% increase in reports of cyberattacks since the outset of the COVID-19 pandemic. Salesforce has always recognized the need of backup and recovery - it brought back its Data Recovery service in 2021 that it had retired a year before. It followed it up with the introduction of a Salesforce backup solution. Whether you choose to use a native, third-party, or Salesforce-built backup solution, as per the SaaS Shared Responsibility Model, it is basic security due diligence take ownership of the protection of your own Salesforce data.

In this ebook we detail six ways to backup and restore Salesforce data, both native and third-party. We hope it helps you during the anxiety-laden moments of data loss that a Salesforce admin has to face.

First, Some Basics of Salesforce Data Loss

"There is a 630% rise in cyber attacks as cloud services use goes up during Covid-19 induced work-from-home."

McAfee

What Are The Types Of Salesforce Data?

Data consists of all records, including Accounts, Contacts, Leads, Opportunities, Cases, Contracts, and other records. Data also includes custom object records, files, content, and Chatter.

Metadata refers to all of configuration settings, such as custom fields, page layouts, Reports, Dashboards and custom code like Apex and Visualforce.

Where Does Deleted Salesforce Data Go To?

Generally, any deleted data in Salesforce undergoes three stages.

1 Within the first 15 days, the data is kept in the Recycle bin.

2 After this deadline, you still can retrieve deleted records with Data Loader or other API clients.

3 Once time or size limits are reached, or when the Recycle Bin is emptied using the UI or the API, your data is hard deleted. In the last stage, the data will be purged from the organization permanently.
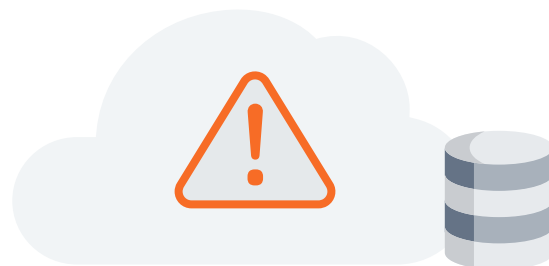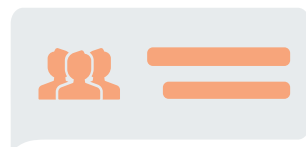
Why Does Salesforce Data Need Protection?

While Salesforce has best-in-class data protection, as you have complete control of your data, they cannot protect you from data loss at your end. These can include commonplace reasons like

Malware, Social Engineering, Ransomware
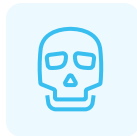
Human Error

Data Loader Errors

Erroneuos Salesforce Automation

Malicious Intent

Outages

"Even with the best of intentions, users and administrators have been in situations where they have either deleted large amounts of data, or have modified records, only to later realize that a mistake was made. With tools like the Data Loader, it is very easy to mass delete or update records. And a simple mistake in your source file or field mapping could spell disaster for your data. It is important for Salesforce customers to develop a routine data backup strategy as part of their overall data management and security model."
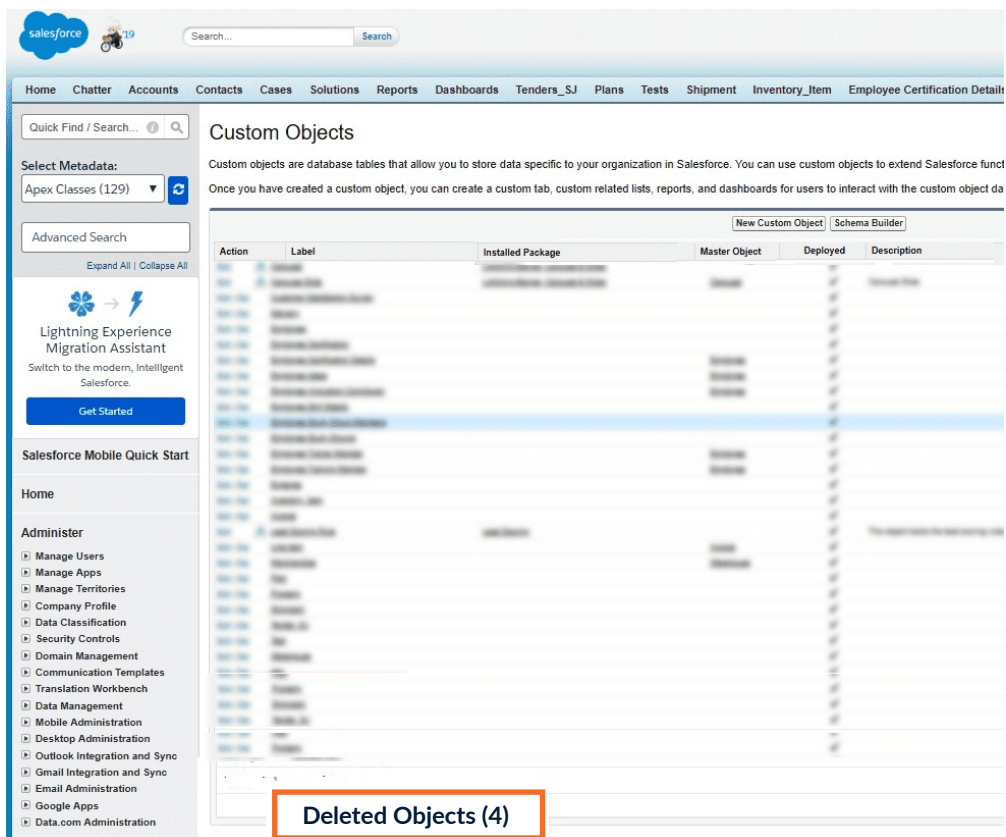
Salesforce Documentation

1 Salesforce Deleted Objects Bin 🗑️

A deleted object is held in the Deleted Objects list for 15 days. It is available in Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, Developer, and Database.com editions. *Customize Application* permission is required.

Step 1: Go to Setup > Build > Create > Objects and click on the "Deleted Objects" link.

Step 2: Restore the required Object

Deleted Objects Bin

- *«Undeletion» is not the same as true recovery, as some of the object properties might be lost or changed.*

- *After the 15-day period, the object and its data are permanently deleted.*

2 Salesforce Data Export

Salesforce's Data Export Wizard App is a feature in the Setup menu. It can be used in a browser. Using it you can generate backups of your data on a weekly (Enterprise, Performance, and Unlimited Editions) or monthly basis (all editions, except for Database.com). It exports all your org's data into a set of comma-separated values (CSV) files. Weekly Data Export permission is needed.

1   From Setup, search for *Data Export,* then select *Data Export* and Export Now or *Schedule Export.*
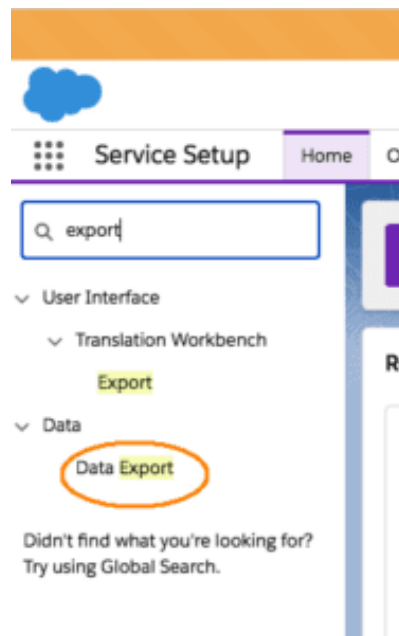
2   Select the desired encoding for your export file. Include all data or select the items you wish to include such as images, documents, and attachments.

3 Under Exported Data, select the types of data to include in your export. If you aren't familiar with the terminology used for some of the types of data, we recommend that you select Include all data.

SETUP
Data Export

Monthly Export Service

Data Export lets you prepare a copy of all your data in salesforce.com. From this page you can start the export proc will receive an email containing a link that allows you to download the file(s). The export files are also available on th

> ℹ **Next scheduled export:**
> None

[Export Now] [Schedule Export]
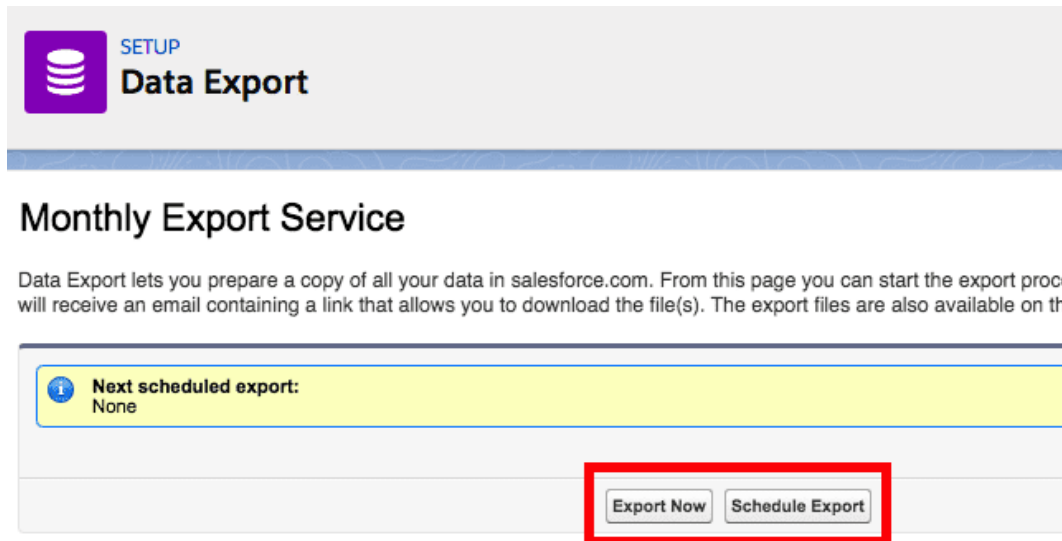
4 Click Export Now or Schedule Export.

Data Export Service

- *Only weekly or monthly backup is supported.*

- *Certain derived and summary fields are excluded from exports.*

- *Exports complete as soon as possible, however we can't guarantee the date and time of completion.*

- *The export generates multiple .zip files. Each .zip archive file contains one/more .csv files.*

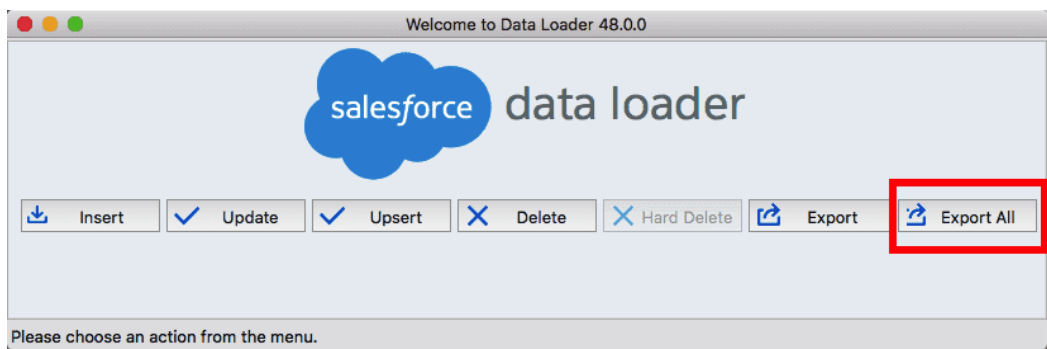- *The data export service isn't supported in sandboxes.*

3 Salesforce Data Loader App ⚙

Salesforce Data Loader App is a native Salesforce API client with a desktop version. It is available in Enterprise, Performance, Unlimited, Developer, and Database.com editions. *Read on the records* permission is required.

1 Open the Data Loader App

2 Click Export. To additionally export archived activity records and soft-deleted records, click Export All instead.

3 After logging in to Salesforce, choose an object. For example, select the Account object. If your object name isn't listed, select Show all objects to see all the objects that you can access.

4 Select the CSV file to export the data to.

5 Create a SOQL query for the data export. For example, select Id and Name in the query fields, and click Finish.

6 To view the CSV file. click View Extraction, or to close, click OK.

Data Loader App

- *Fetches data of only one object at a time.*
- *Salesforce Data Loader offers no scheduling option.*

4 Salesforce Reports 📑

If you have a small organization and only a few objects in use, you can manually export Salesforce reports. The report data is exported as a Microsoft Excel (.xlsx or .xls) file or comma- separated values (.csv) file. It is available in Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions.
Export Reports permission is required.

1 Create a new Report

2 Select the object, and then "All [objects]" and "All Time":
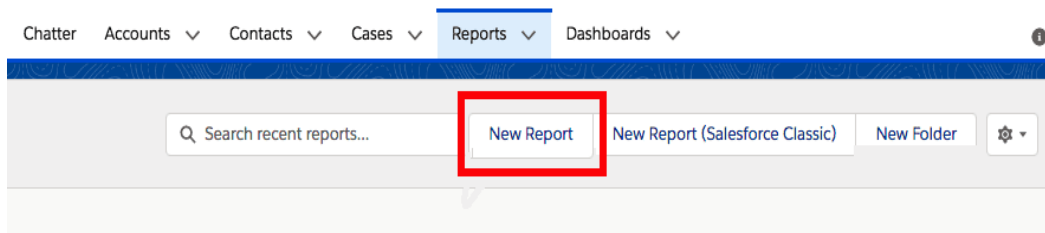
Salesforce Reports

- *In certain editions, you can export a limited number of report rows and columns.*

- *If a report takes 10 minutes to export, then the reports export times out and fails.*

- *Each user can export up to 5 reports at once.*

Native Salesforce **Metadata** Backup and Recovery

As we listed in our first section, Salesforce data and metadata are two different, but equally important components of your Salesforce data. Metadata holds configuration information. This includes Apex triggers, custom fields, page layouts, and other customized parts. All critical information that needs to be backed up. Unfortunately, there is NO native option that backs up BOTH Salesforce data and metadata (apart from the expensive Data Recovery Service)

The following options are available to customers for metadata backup.

1   Change Sets – This can be used to copy your metadata from one Salesforce org to another, such as from Production to a sandbox or developer org.

2   Sandbox Refresh – By refreshing a Sandbox, your metadata is automatically copied over afresh from your production Org.

3   Force.com Migration Tool – An advanced tool that can be used with a command line interface to migrate changes from one Org to another.

"There are a number of data backup solutions offered by our partners on our AppExchange. Some of these are more comprehensive in that they allow you to automate backups of both your data AND your metadata and provide a mechanism by which to restore that data easily."

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Native Salesforce Backup and Recovery For **Metadata** AND Data

#1 Salesforce Data Recovery Service (Paid)

Salesforce retired its Data Recovery Service in July 2020. As per Salesforce, the reason was because "it does not meet our high standards for customer experience due to the length of time and reliability of the process". However, earlier this year, on March 10, 2021, Salesforce reversed its decision.

Note that Salesforce's Data Recovery service costs upward of USD 10,000/recovery and you get your recovered data only after six to eight weeks.

#2 Salesforce Backup and Restore Solution (Paid)

Salesforce introduced its own Backup and Restore solution in September, 2021. As of now, it is available to a limited number of existing customers only. It is a paid service, but the cost is not yet detailed. While there may be some advantages of a built-in solution, there will be no separation of the data and its backup. This is a basic security best practice and a part of the 3-2-1 rule of backups. Also, if your Salesforce instance is inaccessible due to downtime or ransomware, you cannot recover by working off the backup.

The Data Recovery Service costs $10,000, and can take around 6-8 weeks to get the data and metadata restored.
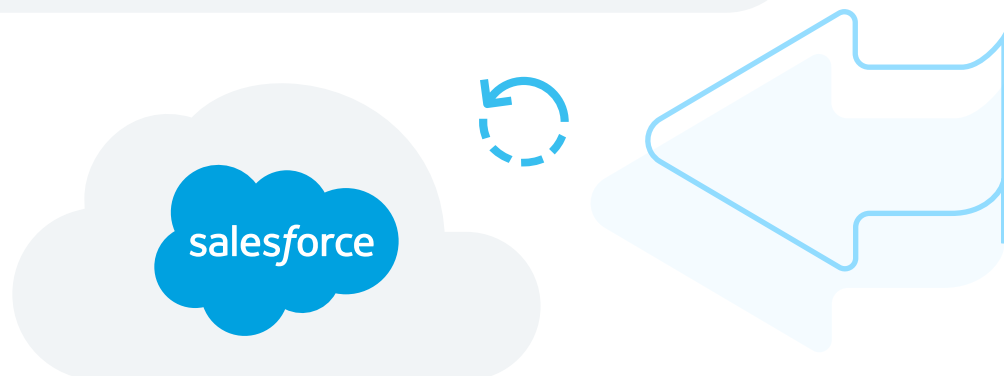
Disadvantages of Native Salesforce Backup and Recovery

Disadvantages of Native Salesforce Backup and Recovery	Salesforce Data Export	Salesforce Data Loader	Salesforce Reports	Salesforce Recovery Service (Paid)	Salesforce Backup and Restore Solution (Paid)
No Daily Backup	No Daily Automated Backup	No Daily Automated Backup	No Daily Automated Backup	No Daily Automated Backup	As of now, it is available to a limited number of existing customers in some countries only
Scheduling is NOT Supported	Only weekly or monthly backup can be scheduled	No Scheduling Support	No Scheduling Support	No Scheduling Support	
Data Excluded from Backup	Derived fields are excluded	Only contains data of one object per export	Only exports a limited number of rows and columns		
Time-consuming	"We can't guarantee the date and time of completion"	Only exports one object at a time	Export fails if it takes >10minutes	Takes 6-8 weeks to get recovered data	
Tedious Recovery	1 Object = 1 CSV export resulting in 100s of CSV files held only for 48 hours.	Recovery limited to a single object per time	A user can only export <6 reports	Costs upward of $10,000	Paid service, but cost not yet detailed
Cumbersome Sandbox Support	Import supported, but cannot export data from a Sandbox	Manual, multi-step process. Issues recreating relation-ships for multi-parent records, intra-objects, and attachments.	Import/Export of Reports is cumbersome and requires third-party plugin	No Sandbox Seeding support	No Sandbox Seeding support as of now
No Separation of Data and Backup	No separation of data and backup - a basic security best practice				
Downtime/ Ransomware Recovery	If your Salesforce instance is inaccessible due to downtime or ransomware, you cannot recover by working off the backup				

No Daily Backup: There is no support for daily backup. On-demand export is only available if "enough time has passed since your last export". This will lower your Recovery Point Objective (RPO) / Recovery Time Objective (RTO). It will slow data recovery and consequently disaster recovery.

Scheduling is NOT Supported with all native options

Data Excluded:

■ With *Data Export*, certain fields such as formula (derived) and roll-up summary fields are excluded.

■ With *Data Loader*, you can export data of only one object at a time.

■ With *Reports*, you can export only a limited number of report rows and columns.

Time-consuming:

- With *Data Export*, including special content in the export increases data export processing time - "we can't guarantee the date and time of completion."
- With *Reports*, export fails if it takes >10minutes.

Tedious Experience:

- With Data Export, every single Salesforce object is exported in a separate .CSV file. This means that you could end up with hundreds of .CSV files. The files are deleted 48 hours after the email is sent. If you forget to download it, you need to run another export. All making for tedious backup and recovery.
- With Data Loader, you can fetch data of only one object at a time.
- Apart from exporting only one object at a time, and only allowing a user to export 5 reports at once, locale settings on your Microsoft Excel application can impact the way data is represented.
columns.

No Sandbox Support:

- The data export service isn't supported in sandboxes. Thus making it difficult to seed sandboxes with production data.
- Importing and exporting Sandbox data using Data Loader is a manual, multi-step process. Users may face i ssues recreating relationships for multi-parent records, i ntra-object relationships, and attachments.
- Importing/exporting reports from one Sandbox to another is cumbersome and requires a third-party plugin.

No Separation of Data and Backup:

- The industry gold-standard 3-2-1 rule of data backups recommends that data and i ts backup be kept on different storage platforms. The Salesforce backup application keeps your backup on the same platform.

Downtime/Ransomware Recovery:

- If your Salesforce instance is inaccessible due to downtime or ransomware, you cannot recover by working off the backup, as it is on the same platform.

The Salesforce AppExchange is home to a rich partner ecosystem that provides robust backup and restore solutions for customers today. These partner solutions go beyond the capabilities included in Weekly Data Export and Data Recovery Service, driving more trust and extending the value of the Salesforce Platform.

Salesforce Documentation

Third-Party Salesforce Backup and Recovery For Metadata AND Data

The modern organization with a distributed hybrid workforce that is highly dependent on Salesforce for its business processes, cannot skimp on data loss protection. As Gartner puts it, "Assuming that your SaaS applications do not need backup is plain dangerous". The average breach costs $3.92 million and takes 197-238 days to detect, well beyond the 15-30 data Recycle bin timeline. By the time you realize the data is gone, it is gone for good.

What must robust, Salesforce backup include?

- ☑ Secure, automated, daily Salesforce backups
- ☑ Comprehensive backup of ALL Salesforce data
- ☑ Unlimited data retention
- ☑ Effortless recovery of all Salesforce data from any point-in-time
- ☑ Multiple, flexible recovery options
- ☑ Admin-friendly features
- ☑ Salesforce-tailored add-ons
- ☑ Audit compliant certifications
- ☑ All at a cost-effective price.

All these are must-have requirements for Salesforce backup and recovery that ensures business continuity in the event of data loss. And these requirements are only met with third-party backup. A fact that Salesforce acknowledges multiple times over. But not all Salesforce backups are created equal, so ROI-check your options.

> *There are a number of data backup solutions offered by our partners on our AppExchange. Some of these are more comprehensive in that they allow you to automate backups of both your data AND your metadata and provide a mechanism by which to restore that data easily.*
>
> **Salesforce Documentation**

Why Choose CloudAlly Salesforce Backup

CloudAlly pioneered SaaS Backup for the enterprise a decade ago. Consequently, our backup solutions for Salesforce, Microsoft 365, Google Workspace, Sharepoint and OneDrive, Dropbox, and Box are tried and tested by organizations with thousands of users. We're top-rated by Salesforce Ben, Gartner Capterra and G2, and were Newsweek's leading SaaS backup solution.

Comprehensive Salesforce Cloud-to-Cloud Backup:

• Daily automated or on-demand Salesforce backup of all your Salesforce data, metadata, and Chatter feeds.

• Unlimited AWS S3 backup storage or your own storage (BYOS).

• Minimize Salesforce API usage with only delta changes being fetched daily. Auto-pause of backups when API limit reached.

Fast and Flexible Data and Metadata Recovery:

• Point-in-time recovery with historical snapshots.

• Granular recovery of object-level metadata and record-level data.

• Export Archives to your own storage in Zip format, or directly to your own S3, Azure, Box or Dropbox storage.

• Immutable Storage-Object-Lock (optional) for ransomware recovery.

For Our Partners:

• **White-label backup** to retain your brand identity
• **MSP Partner Portal** for single-pane visibility and management of all accounts.
• **Bundled services** including pre-sales and marketing collateral

Special Pricing for:

• **Non-profit Organizations**
• **Educational Institutions**

→ Free Trial   → Book a Demo

5-Min Setup, Zero Adoption Effort, Cool tools:

• Intuitive UI with admin-friendly tools - auto-detect, auto-archive, auto-backup.

• Sandbox Seeding: to easily test applications by seeding the sandbox with the replica of production data.

• Sandbox Comparison to compare your data or metadata across backups to easily identify and recover corrupted data.

• Anomaly Detection and notification about activity red flags.

• Tier-1, real-person, 365x24x7 exceptional customer support via the Customer Hub, Chat, Phone, Email, & Ticket.

Secure and Audit-Ready:

• GDPR, and HIPAA compliant, and ISO 27001 certified.

• Secure authentication with MFA/2FA, OAuth, and Okta support.

• Your choice of data centers in Australia, Canada, Germany, Ireland, U.K., U.S.

• AES-256 bit encrypted backup and 99.9% uptime SLA.

• Filterable Audit and Activity Log with drill-down view of all Exports, Restores, and Backups.

• Backup Exception Email Alerts with inline troubleshooting links.

CloudAlly Backup by the Numbers

9K	**500K**	**2.5M**	**1B**
Secure their data	Protect from data loss	Completed per day	Secured each month
ORGANIZATIONS	**USERS**	**BACKUPS**	**FILES**

Software Reviews GOLD MEDAL 2021

GetApp CATEGORY LEADERS 2021

GetApp BEST FUNCTIONALITY & FEATURES 2020

Capterra TOP 20 2020

Safe, Reliable, Simple Salesforce Backup
SALESFORCEBEN