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Salesforce No Longer Offers Data Recovery:

How To Build Your New Backup Strategy for Salesforce

Microsoft Partner

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Gold Application Development
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Accessible content is available upon request.

Today's Speakers

John Hodges

SVP of Product Strategy

John is focused on developing solutions that address modern data protection needs for organizations worldwide, working with many Fortune 500 companies to drive sustainable adoption of Microsoft technology.

Eric Krusi

Solution Engineer

Eric has worked in the IT field since 2008, with experience across all areas of the Microsoft and Salesforce Stacks. Eric is passionate for advising organizations on industry best practices during their digital transformation journey.

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2020 Partner of the Year Winner
Singapore
2017 Partner of the Year Winner
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2016 Partner of the Year Winner
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2015 Partner of the Year Winner
Collaboration and Content
2014 Partner of the Year Winner
Public Sector: Public Safety and National Security

Migrate. Manage. Protect.

12	99.5%	24/7	50PB+
Global Cloud Instances	Availability Backed by Azure	World-Class Support	Managed Customer Data

ISO Certification

Information Security Management System
ISO 27001
Certified

27001:2013

17K	7M	88	7
Customers	Cloud Users	Countries	Continents

AvePoint® is headquartered and maintains its principal operational center in Jersey City, NJ, with approximately 1,500 employees across five continents.

AOS-USG *(FedRAMP Moderate In Process)*

Our cloud services are officially "In-Process" and will be fully authorized as a FedRAMP accredited SaaS solution at the Moderate impact level pending completion of our agency sponsored authority to operate (AT0) expected in early 2021.

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Why do I need Salesforce Backup?

1. Salesforce's recycle bin holds deleted data for 15 days after which data is permanently deleted
2. Salesforce data recovery service discontinued
3. Native options are limited since the SalesForce data recovery feature was retired
4. Salesforce strongly encourages the protection of data via a partner like AvePoint

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More Common Data Loss Events…

User-Driven Errors

"We've identified around 2000 contacts that have been added incorrectly to our Salesforce org via the Salesforce for Outlook plugin"

"Someone updated the contacts for our account, that's not in the recycle bin…"

Admin-Driven Errors

"I have an example where 32,000 records were accidentally deleted (not by me). The fix was to go through the recycle bin and undelete them page by page."

"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."

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Why do I need to backup my data?

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 recommended that you keep a regular backup of your data and to do a manual point-in-time backup before you proceed with any major data project within your organization.

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Why do I need to backup my metadata?

Just as it is easy for users to accidentally delete records or modify records, it is also easy for administrators or developers, and users with advanced permissions, to make changes to your configuration settings, such as adding or deleting custom fields, modifying page layouts, deleting or changing Reports and Dashboards, or modifying custom code. As many of these changes are not reversible, it is important to have a copy of your metadata to fall back on in the event that you need to restore prior settings.

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KNOWLEDGE ARTICLE

Best practices to backup Salesforce data

Knowledge Article Number 000334121

Description

It is important for Salesforce customers to develop a routine data backup strategy as part of their overall data management and security model.

It is important to understand the differences between data types (data and metadata) and what is included in each backup method:

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

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

Data Recovery Retirement:
As of July 31, 2020, Data Recovery service has been retired and no longer available as a service. Please review this help article if you would like to learn more about best practices.

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salesforce Trailblazer COMMUNITY

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Ideas

All Ideas

Idea Details

Allow data loader to undelete records

Data Import & Integration

Description

What changed?
As of July 31, 2020, Data Recovery service has been retired and no longer available as a service.

Why is Salesforce making this change? At Salesforce, customer Trust is our number one priority. The data recovery process does not meet our high standards for customer experience due to the length of time and reliability of the process. This process takes a minimum of 6 - 8 weeks to complete and we cannot guarantee 100% data recovery. Due to these issues, we are no longer offering this service as of July 31, 2020.

What do you recommend?

To help customers routinely back up their data, we offer several native options that are available for no additional cost to customers. Salesforce provides tools like Data Loader and the API as a method for customers to manually restore their data. It is important to note the order in which data is restored, so that relationships and the connection to related records can be preserved.

Native Data Backup Options

The following options are available to customers as a method of backing up their data. For Premier Customers, the following Accelerator is also available: **How to: Platform: Backup and Manage Salesforce Data**.

- **Data Export Service:** Manual or scheduled exports of your data via the UI. **Export Backup Data from Salesforce**.
- **Data Loader:** Manual on-demand exports of your data via the API. **Export Data.**
- **Report Export:** Manual on-demand exports of your data via reports. **Export a Report.**

Third-Party Offerings

There are also several third-party options that can be leveraged from our partners on the AppExchange. Some of these are more comprehensive in that they allow you to automate backups for both your data AND metadata, and provide a mechanism by which to restore that data easily. You can search for these by visiting the **AppExchange** directly and searching for keyword **backup.** We recommend that customers vet multiple offerings and audit the reviews provided by other customers before selecting one of these offerings. Note: Salesforce does not endorse or recommend one specific solution over another.

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How AvePoint can help

One-Click Salesforce Backup

- No need to configure – automatically configured backups begins upon log in.
- Schedule additional backups up to five times a day with the click of a button

Comprehensive Restore Options

- Quickly restore at the organization, object, record and field levels.
- Restore in bulk or granularly as needed.

Encrypted and Secure Data Protection

- Cloud Backup is hosted in the cloud, utilizing Microsoft Azure Encryption
- User account tokens add a layer of security to ensure sensitive data compliance needs are met.

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Central Command Dashboard

Central Command Dashboard that summarizes backup history, API usage, and user activity for Salesforce organizations

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Compare before you restore…

Minimize Human Error

- Compare backup versions to understand how your Salesforce objects and metadata have changed.
- Confidently restore data in-place from the right backup to the right destination.

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Restore Sandboxes to Other Organizations

Backup you Sandboxes and multiple organizations, and restore out of place to different organizations.

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Delegated controls to empower users

Work with security teams

- One backup SLA, but many ways to restore
- Divide by administration by Salesforce Organization

Identify service administrators

- Segregate backup and restore operations by team
- Allow exporting of metadata and backup data comparisons

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Backup Data Download

Keep a local copy of Salesforce data by exporting backup data with associated field values to CSV files

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DEMO TIME!

AvePoint Cloud Backup for SalesForce

Unlimited, automated backup for your SalesForce assets

Quick, on-demand recovery ensures you have access to data when you need it most. Backup metadata, records, organizations, and files from multiple organizations up to 3X per day to meet aggressive RPOs. Bring your own storage or take advantage of AvePoint's unlimited offering to avoid storage limitations.

Granular restore, in or out of place

Export offline even if the cloud service is down or corrupt! Compare backed up data, then perform in or out-of-place granular restoration of Salesforce data. Maintain full fidelity and user mapping to any connected production or sandbox Salesforce organization.

Visibility and control over protected content

Simple dashboard display gives immediate insight into your backup history and compares your previous backups. Easily access backup histories for every object. Whether you bring your own storage – or use AvePoint's Azure storage – you retain full control over your protected content!

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Salesforce Native Data & Metadata Backup Protection	AvePoint Protection
Haven't you heard? **"As of July 31, 2020, Data Recovery service has been retired and no** longer available **as a service. "** That's right. Salesforce has ceased offering its data protection service. Depending on your license, you can still export your data on a weekly or monthly basis. But, you have to keep track of everything on your own and there is no native restore solution. Salesforce now recommends reaching out to a third-party backup vendor like AvePoint to protect your data.	Automatic, daily, and comprehensive backup of data and metadata, or schedule it up to five times per day
	Quickly restores data and metadata at organization, object, record, and field levels
	Restoration of parent and child relationship records to ensure integrity
	Out-of-place restore with full fidelity and user mapping to any connected production or sandbox Salesforce organization
	Central command dashboard to run an extra backup, view usage graphs, and audit user activities
	Audit user actions, including login, backup, and restore
	100% cloud hosted, no installation or configuration. Encrypted and secure data protection

https://help.salesforce.com/articleView?id=000352139&language=en_US&type=1&mode=1

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