SPANNING BACKUP SALESFORCE

FREQUENTLY ASKED QUESTIONS (FAQs)

Protect your customer data and your organization with an enterprise-class, automated backup and recovery solution for Salesforce. Spanning Backup for Salesforce is designed to work natively within Salesforce and provides automated backup and restore within the Salesforce interface.

The following are frequently asked questions about Salesforce backup, native Salesforce data recovery options and Salesforce data retention periods.

01

Spanning Backup for Salesforce

Q

Why do we need to back up Salesforce data?

For many organizations, the countless records of CRM data stored within Salesforce are indispensable to company success and business continuity. Salesforce provides complete protection from fault on their end, offers varied options for manual backup within the platform and can assist directly in recovering lost data if absolutely necessary. However, they cannot protect your data from threats beyond their control, and the native backup and last-resort options come with numerous restrictions, limited capabilities, lengthy completion times and a hefty price tag. For these reasons, Salesforce themselves recommend investing in a full-featured, third-party backup and recovery solution like Spanning Backup for Salesforce.

Q

What types and causes of Salesforce data loss does Unitrends cover?

Spanning Backup for Salesforce protects your business against a wide range of events that cause data loss in Salesforce, including:

- ✔ User error
- ✔ Data deletion – accidental or intentional/malicious
- ✔ Ransomware, viruses or malware – including those that disrupt versioning. If ransomware has infected large amounts of your data, Unitrends Support can help determine which backups were created before the attack and what the best path to recovery is
- ✔ Third-party software or programmatic errors
- ✔ And more

Regardless of the cause of data loss, all previously backed up versions of files are recoverable. Spanning's unlimited retention means backed up data is never deleted and is always available when you need it.

Q

What is backed up by Spanning Backup for Salesforce?

Your most critical Salesforce data, including attachments, files and metadata, is protected as per the schedule and retention policy you choose. Spanning Backup for Salesforce includes:

- ✔ Unlimited retention
- ✔ Automated daily backup
- ✔ On-demand backup
- ✔ Custom Objects backup
- ✔ Attachment backup

- ✔ Metadata backup
- ✔ Customization backup
- ✔ Force.com apps backup
- ✔ Chatter backup
- ✔ Customizable backup time

Q

How much backup storage and retention will I have?

By default Spanning Backup for Salesforce offers unlimited backup retention. Retention of backups is customizable to meet the needs of your organization and Salesforce environment.

Q

What is the installation and setup process like for Spanning Backup for Salesforce?

Setup for Spanning Backup for Salesforce is easy and requires no on-premises software or hardware. Upon installation, Spanning will request Salesforce API permission to access your domain. Once you grant authorization, Spanning provides a 14-day free trial with 100 trial licenses that you can assign to users through the user interface or via our API.

Q

What is the difference between data and metadata in Salesforce?

The difference between data and metadata is best understood by knowing the literal definition of metadata, which is "data that describes other data." In simpler terms, metadata is "data about data," or data that describes the configuration and structure of a Salesforce org as opposed to the data itself. When discussing Salesforce:

✔ **Data** refers to the information comprising records such as Accounts, Contacts, Opportunities and Leads.
✔ **Metadata** refers to the settings and customizations that have been applied to an org, such as Dashboards, Reports, Objects, Layouts and Permission Sets, to name a few.

Q

Why do we need to back up Salesforce metadata?

Metadata is used to describe and organize data so that it is easy to search, locate, retrieve and utilize for business purposes. This structure provides valuable context and insight into a data set and serves to maximize efficiency and streamline BI (Business Intelligence) initiatives. Unfortunately, just as with the data itself, it is very easy to delete a Report, modify a Dashboard or misconfigure any number of settings within an org that could have a detrimental effect. Without a proper backup and recovery solution in place, many of these mishaps will prove irreversible and productivity will suffer as a result.

02 Native Salesforce Data Recovery capabilities and limitations

Q

Does Salesforce back up data?

Salesforce keeps a backup copy of customer data to support their disaster recovery plan. This data is made available to customers as part of the Salesforce Data Recovery service, although Salesforce explicitly warns against relying on the service in the event of data loss.

Q

What is the Salesforce Data Recovery service?

The Salesforce Data Recovery service is a last resort option for point-in-time recovery of lost or damaged Salesforce data. The service is performed manually by Salesforce Support, takes a stated minimum of six to eight weeks for completion and carries a price tag of $10,000 per organization recovered. In addition, there are several notable limitations to the service, such as the exclusion of metadata from recovery and a maximum recoverable window of three months (90 days) from the date requested. Due to these issues, Salesforce urges customers to develop an independent backup and recovery strategy for their data protection.

Q

Where is the recycle bin in Salesforce?

The Recycle Bin can be located on the Home page tab within the left sidebar in Salesforce Classic. It typically resides at the bottom of the sidebar and is denoted by a green recycle bin icon that is placed against a light green band to distinguish it from other menus in the sidebar. Oftentimes, if you have trouble locating the recycle bin, it is because the sidebar has been pinned to the side of the window. In this case, locate the arrows in the upper or lower left of the visible window to expand the sidebar.

Q

How long is data stored in the Salesforce recycle bin?

Once data has been deleted, it will reside in the Salesforce recycle bin for a maximum of 15 days. During this period, known as the "soft-delete" stage, data can be restored back into the org. If data is emptied from the recycle bin, or the 15-day retention period expires, the data becomes "hard-deleted" and is not able to be recovered. You can, however, access the said data by using the Salesforce workbench. If data is further deleted from the database, the deletion becomes permanent and the data is only accessible or recoverable if a backup solution is in place or via the Salesforce Data Recovery service.

Q
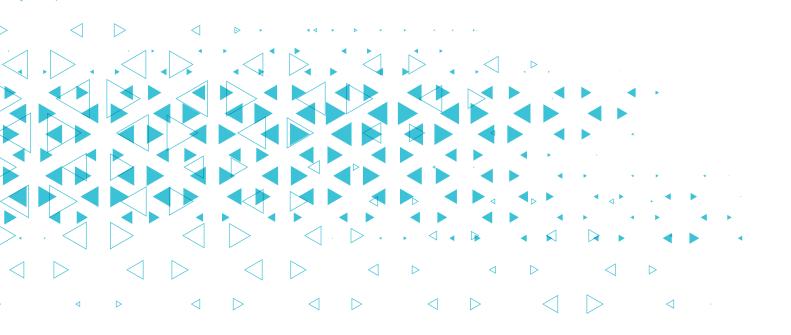
How do we restore a deleted record in Salesforce?

Deleted records in the "soft-delete" stage may be restored by using the undelete operation within the recycle bin. However, the undelete operation cannot be used on records or data that have been manually purged from the recycle bin or exceeded the 15-day retention period. If this is the case, the data is no longer recoverable without a backup solution.

Q

What native Salesforce data backup options are available?

Salesforce provides several functions that organizations can utilize for the purpose of taking backups. Most notably, the Data Export Service allows orgs to export all of their data manually or via scheduled export on a weekly (Enterprise, Performance and Unlimited Editions only) or monthly basis. In addition, the Data Loader can be used to export data from Salesforce objects, or data may be exported from Salesforce reports. These exports are delivered as an excel (XLS) or set of CSV files, and can be stored as backup data in the manner of their choosing. These export options, however, cannot be used to back up metadata.

Q

What native Salesforce metadata backup options are available?

Salesforce offers several options in the way of backing up metadata. First, customers are able to use sandbox orgs for backup purposes since metadata is automatically copied into a sandbox when one is created or refreshed. In addition, Change Sets can be utilized to copy metadata from a production org to a sandbox or developer org. If customers opt for local storage, copies of metadata can be exported from the production org using the Force.com ANT Migration Tool. Lastly, metadata can be exported to (and later deployed from) the Force.com IDE.

03

Salesforce
Data Recovery

Q

Does Spanning support granular recovery?

Yes, we support granular recovery, meaning you choose the item or file you want to restore, including objects, fields and metadata.

Q

What is the recovery process like? Who performs recoveries?

Recovery is easy, immediate and self-service through the Spanning user interface. Admins and end users (if granted permission by an admin) can conduct restores.

Q

What types of files can be restored and how does it work?

Restore options and features for Spanning Backup for Salesforce include:

- ✔ Point-in-time restore
- ✔ Direct, on-page restore
- ✔ Field-level restore
- ✔ Deleted items restore
- ✔ Metadata restore
- ✔ Parent-child relationship restore
- ✔ Cross-org restore
- ✔ Sandbox Seeding

- ✔ Data anonymization
- ✔ Search-based restore
- ✔ Bulk items restore
- ✔ Whole account exports
- ✔ End user self-service restore
- ✔ CSV import restore
- ✔ Point-in-time metadata comparison

Q

What retention settings can I set for my Salesforce backups?

By default, retention is unlimited in Spanning. However, you can customize backup retention to meet your organization's needs.

Q

Can I choose where my backup is stored?

Spanning provides data center storage options in the United States, Canada, UK (London), EU (Ireland) and Australia.

Q

Where is my backup recovered to?

Salesforce Administrators can restore Fields, Records and Metadata back to the original Salesforce production organization or perform a cross-org restore provided they have the credentials for the Sandbox, Partial Sandbox or Dev environment available.

Q

Does the solution recover data without overwriting more recent changes?

Spanning conducts non-destructive restores. When records are restored, they generate a new Salesforce ID and Spanning attempts to repair or update any lookup relationships referencing the record prior to restore. You may optionally choose to overwrite field values during the restore process.
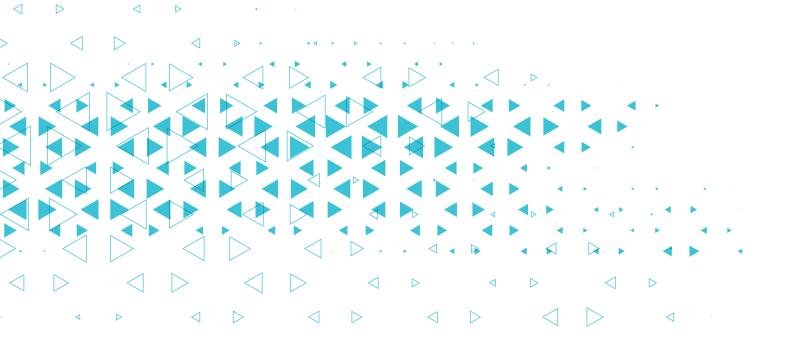
Q

Can I restore backed up data from one organization to another?

Yes. You can easily restore data and metadata from one organization into another, with an option to anonymize specific fields during restores.

Q

What administration and reporting features are included?

Spanning Backup for Salesforce delivers detailed status monitoring and transparent reporting. Features include:

- ✔ API usage monitoring
- ✔ Configurable API limits
- ✔ Error correction suggestions
- ✔ Status updates through Chatter

- ✔ Status update emails
- ✔ Immutable audit log
- ✔ Lightning certified

04

Security, licensing and billing

Q

Is my backup secure?

Yes. Spanning is SOC 2 Type II certified, regularly completing rigorous audits of security procedures and processes. Spanning Backup protects data at rest with 256-bit AES object-level encryption and all data in transit is also protected with Secure Socket Layer (SSL) encryption. Security features include:

- ✔ SOC 2 compliance
- ✔ Application-level authentication
- ✔ Strong encryption
- ✔ Intrusion detection
- ✔ Compartmentalized access

- ✔ HIPAA compliance
- ✔ Third-party certifications and audits
- ✔ BB EU Privacy Shield certified
- ✔ GDPR compliant

For more details on security, please visit
www.unitrends.com/wp-content/uploads/UNI-DS-Spanning-Backup-Salesforce.pdf

Q

Is the service HIPAA compliant? Can you provide me with a Business Associate Agreement (BAA)?

Yes. Spanning Backup for Salesforce is compliant with the Health Insurance Portability and Accountability Act (HIPAA) and EU-U.S. Privacy Shield Framework. Spanning can provide customers with a Business Associate Agreement (BAA) as well.

Q

Can administrators review logs of data backup and recovery operations?

Yes. All user and admin actions are tracked in an immutable activity log.

Q

How is Spanning Backup for Salesforce licensed and priced?

Pricing is per user, per month, with discounts available for large user sets or non-profit organizations.

Q

What do I pay for backup storage?

Nothing additional. Backup storage with unlimited retention is included in your Spanning Backup for Salesforce license.

Q | **Are any Salesforce backups stored on my Unitrends Recovery Series or Unitrends Enterprise Backup appliance?**

Spanning Backup for Salesforce backups are stored in the cloud, not on your Unitrends appliance.

Q | **What do I pay for recoveries and bandwidth?**

Nothing additional. There are no charges for performing data restores from Spanning.

05 Getting started with Spanning Backup for Salesforce

Spanning Backup for Salesforce provides automated backup and recovery that you can trust for Salesforce data, metadata, attachments, customizations and Chatter messages.

To get started, visit: **www.unitrends.com/get-started**

ABOUT UNITRENDS

Unitrends makes efficient, reliable backup and recovery as effortless and hassle-free as possible. We combine deep expertise gained over 30 years of focussing on backup and recovery with next-generation backup appliances and cloud purpose-built to make data protection simpler, more automated and more resilient than any other solution in the industry.

Learn more by visiting unitrends.com or follow us on LinkedIn and X @Unitrends.

UNITRENDS
A **Kaseya** COMPANY