Why Back Up Salesforce Data with Druva?

Keep customer data secure, intact, and available

Data backup and recovery strategies for cloud and SaaS workloads are increasing in focus for organizations. It is no longer "if," but rather "when" a company will need to recover from data loss. Salesforce is critical to the success of your business, which means it's time to think about how you back up its critical data.

While data loss is inevitable within any organization, whether through human error, ransomware attack, or data breach, being proactive about data protection is the first step to avoiding business disruptions.

Does Salesforce back up your data?

There is confusion around what Salesforce is backing up, how it can be retrieved, and how long it takes to restore data. Salesforce provides native tools that can be used to back up data, but it's important to recognize that most are manual and will only export your data — not restore in the event of data loss. The exception to this is with Salesforce's backup and restore tool; but you must consider how accessible this backed-up data is. For example, retrieving it may involve a zip file full of CSV files, with a manual, time-consuming restore process. You will also need to proactively pull down these CSV files weekly, and most don't realize they MUST take this step to recover their data when the time comes.

What's metadata and why is it critical for backup?

Metadata is data providing information about other data. For example, names of data fields such as the first and last name are metadata. As you can see, backing up data without metadata would basically be useless because you would lose how it is connected to other data.

If we make a mistake, can't we just find it in Salesforce?

All departments rely on Salesforce, making it difficult to locate where problems are coming from and distinguish the root cause. In a large enterprise, there are potentially thousands of Salesforce users, and data glitches can just as easily happen in small organizations. Consider how long it would take to go through and manually fix an issue with 100 users — and this is after the days or weeks it took to even identify the issue.

Salesforce is a dynamic database with data and metadata unified. When you restore, it's essential to properly repair all interconnections; this relies on backup intelligence and application awareness.

How do you know if you're backing up your Salesforce data?

This is a common and difficult question to answer for any organization. There is not a one-size-fits-all answer for everyone. Depending on the size of your organization, you may have a Salesforce admin (either in-house or contracted), but are they responsible for the backup? Or is it the director of IT, the backup admin, or the systems admin that should be responsible? This confusion and uncertainty is the reason that your Salesforce data is not secure or properly backed up.

Protect Salesforce data with Druva

Druva addresses gaps in security and recoverability. A 100% SaaS-based data management solution, Druva provides an essential layer of functionality to ensure Salesforce is always protected and available while also helping to lower your storage costs. Smarter archiving and retention further drive down costs and help ensure compliance. Secure backup provides an "air-gap" making data resistant to user error and other threats. Druva deploys quickly via Salesforce AppExchange and delivers a comprehensive approach to boost enterprise data resiliency.