

Salesforce Backup & Recovery Best Practices

Set it and Forget it - Automate Everything

Manual backups are error-prone and time consuming. Automate backups hourly, daily, or in near real time.



Don't Just Back Up - Test Your Recovery

A backup is only as good as its restore. Make recovery testing a habit so you're confident your data is there when it counts.



Include Metadata in Your Strategy

Objects, custom fields, workflows, and automations define your Salesforce org. Backing up metadata means you can restore your entire Salesforce experience, not just the records.



Keep a Clean Chain of Custody

Audit trails, logs, and change history are critical for compliance. Make sure your backup tool offers transparent logs and version tracking.



Replicate Outside of Salesforce Ecosystem

Don't keep your backup data in Salesforce. Replicate it to your preferred database or data warehouse, cloud or on-prem, for maximum control.



»»» Bonus Tip:

Accidental deletes happen. Granular recovery lets you restore exactly what you need, no full rollbacks required.

Take control of your Salesforce data with these essential tips.