Best Practices for Data Archival in Salesforce

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Today, when it comes to any medium or big Salesforce implementation, there is an exponential rise in the amount of data being generated by enterprises using Salesforce. One of the most important aspects of managing a business today is managing its data growth and identifying inactive data that can be archived to a safe and secure storage.

Why is Data Archival Important?

- Large data volumes can result in slower query performance, impacting user experience
- Data consolidation can bring considerable improvements to your users' proficiency
- Archiving gives your organization greater control of your information processes
- Archiving production data reduces storage cost
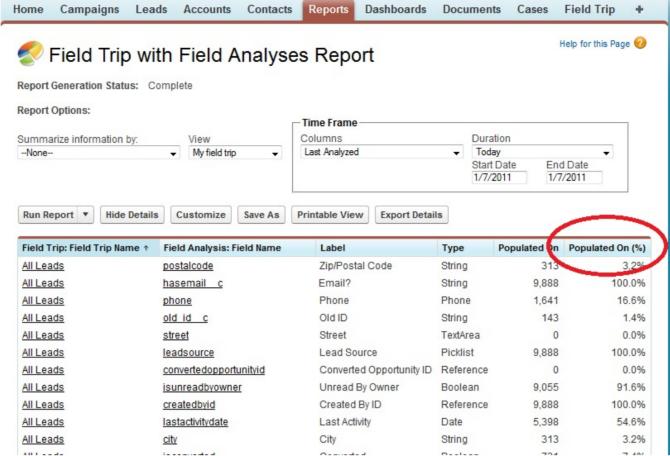- Archiving also keeps your data safe

Data Archival in Salesforce needs to be planned and analyzed carefully. The top 3 things to analyze to plan for Archival are

1. Storage and Limits
   - How much storage does your org have?
   - How much storage are you currently using?
   - Storage limits by edition – https://help.salesforce.com/articleView?id=limits_storage_allocation.htm&language=en_US&type=0
   - You can even view your total storage in Salesforce, split by data and file storage

Current Data Storage Usage			
Record Type	Record Count	Storage	Percent
Logs	13,637	26.6 MB	62%
Forecasting Items (Historical)	4,158	4.1 MB	9%
Tasks	415	830 KB	2%
Opportunity Splits	319	638 KB	1%
Rewards	315	630 KB	1%
Opportunities (Historical)	626	626 KB	1%
Opportunities	312	624 KB	1%
Leads	301	602 KB	1%
Custom Widgets	298	596 KB	1%
Endorsements	267	534 KB	1%
Tasks	232	464 KB	1%
Feedback	170	340 KB	1%
Email Messages	86	310 KB	1%
Live Chat Transcript Events	147	294 KB	1%
Case Milestones	146	292 KB	1%
Cases	139	278 KB	1%
Events	139	278 KB	1%

2. Usage Trends
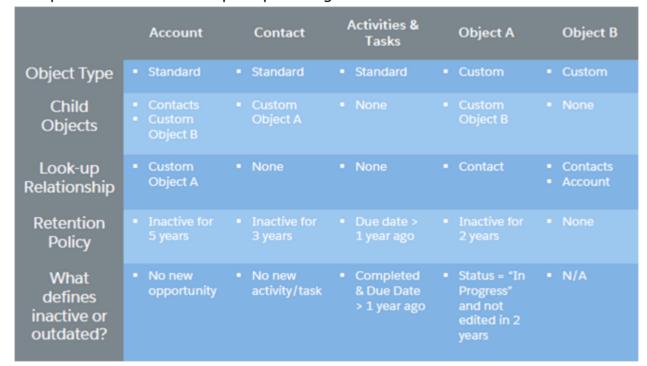   - Data usage metrics in Salesforce

- Ensure you have the tools to evaluate the data
- Identify which objects are responsible for the most data growth
- To track the trends, use free Appexchange tools like Field Trip (https://appexchange.salesforce.com/listingDetail?listingId=a0N30000003HSXEEA4) and Data Quality Analysis Dashboard (https://appexchange.salesforce.com/listingDetail?listingId=a0N300000016cshEAA)
- Create re-usable dashboards to determine what data to archive
- Determine the best tools to execute your data archival process. There a handful of backup apps available on the appexchange. I will be writing a separate post to detail the tools available and know which option is the best depending on your use case.

3. Implications
   - Legal implications – Always consult with your legal team before deleting data from Salesforce
   - Source of Truth
   - Data integrity implications – Parent-Child Relationships and Field Removal
   - Example considerations of implications of deleting records – Review master detail relationships as deleting master also deletes the child, Review lookup relationships as there is no impact when deleting related records, Review Activities and Tasks as deleting "Related to" record deletes the Activity/Task Record

Sample of an Archival Impact planning document

	Account	Contact	Activities & Tasks	Object A	Object B
Object Type	Standard	Standard	Standard	Custom	Custom
Child Objects	Contacts, Custom Object B	Custom Object A	None	Custom Object B	None
Look-up Relationship	Custom Object A	None	None	Contact	Contacts, Account
Retention Policy	Inactive for 5 years	Inactive for 3 years	Due date > 1 year ago	Inactive for 2 years	None
What defines inactive or outdated?	No new opportunity	No new activity/task	Completed & Due Date > 1 year ago	Status = "In Progress" and not edited in 2 years	N/A

Once you have created your data archival framework, make sure to continuously monitor the data usage

- Establish a timeline to review your data management and archiving processes
- Continue using Field Trip and Data Quality Analysis Dashboards to monitor record completeness
- Measure the impact using dashboards
  - Salesforce Adoption Dashboards – Provides visibility into the adoption of key features such as accounts and contacts. https://appexchange.salesforce.com/listingDetail?listingId=a0N30000004gHhLEAU
  - Adoption Trendz – Collect usage stats over time using Analytic Snapshots. https://appexchange.salesforce.com/listingDetail?listingId=a0N30000008ZLM0EAO

Key takeaways

1. Understand your storage limits and data growth trends.
2. Consider the implications when purging data.
3. Backup your data before mass deleting data.
4. Archive and delete data you no longer need.