Agenda

- Why should you back up Salesforce?

- Veeam best use cases

- Veeam solution for Salesforce

- DEMO

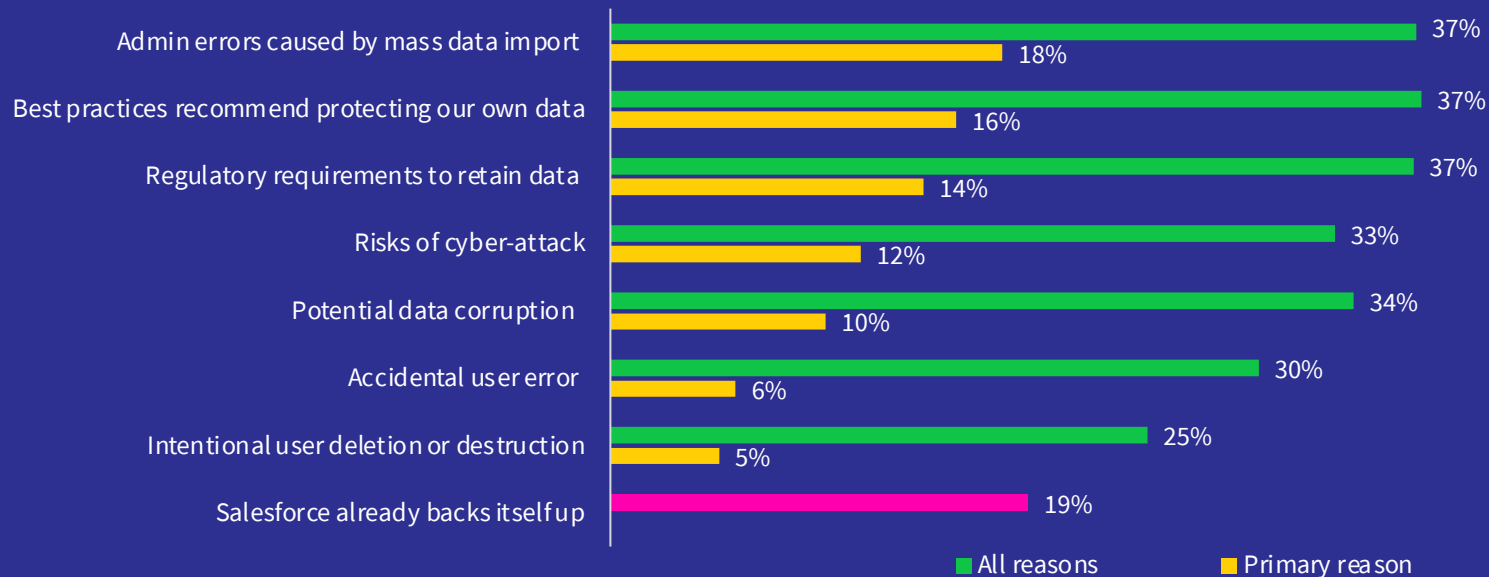- Looking into the future

- Conclusion

Why back up Salesforce?

Why back up Salesforce?

Why does/would your organization protect or back up Salesforce data?
What is your primary reason? (n=800)

Reason	All reasons	Primary reason
Admin errors caused by mass data import	37%	18%
Best practices recommend protecting our own data	37%	16%
Regulatory requirements to retain data	37%	14%
Risks of cyber-attack	33%	12%
Potential data corruption	34%	10%
Accidental user error	30%	6%
Intentional user deletion or destruction	25%	5%
Salesforce already backs itself up	19%	

■ All reasons　■ Primary reason

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Mistakes, errors…

Human error (admin)

Even with deep Salesforce expertise, it's all too easy — and tempting — to upload or change data on the fly while in production.

Example: A Salesforce admin uses Data Loader to upload a large amount of data, but accidentally maps a list of fields incorrectly, which overwrites all existing data.

Human error (user)

Even users with regular permissions can cause major data loss incidents and not everything can be restored from the recycle bin.

Example: A customer support representative in the call center deletes or alters data that was used in a report, which then feeds into an important team dashboard and now the dashboard is reporting on incorrect data.

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Mistakes, errors… #2

Integration error

Salesforce has hundreds of plug-ins and integration options that alter or move data, many of which are consistently rolling out updates. As a result, data loss or corruption to data or metadata is common. It's often the smallest data corruptions that are the hardest to identify.

Example: Integrating third-party applications like HubSpot can cause issues if all the properties, including contacts and leads, are not mapped correctly.

Data corruption (accidental)

Salesforce administrators can move large volumes of data or consolidate data quite easily, but this means that mistakes are just as easy to make. Accidental data overwriting or deleting during these processes are very common.

Example: An administrator mass-transfers opportunities based on new territory splits, and as a result, named accounts are removed from the account executives that need them.

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Salesforce data protection: perception vs. reality?

Perception

It's in the cloud, everything is protected.

Salesforce

CRM Application   SaaS Infrastructure   Salesforce Data and Metadata

Reality

Salesforce is responsible for the uptime of the application and cloud infrastructure.

You are responsible for your data.
You need a backup!
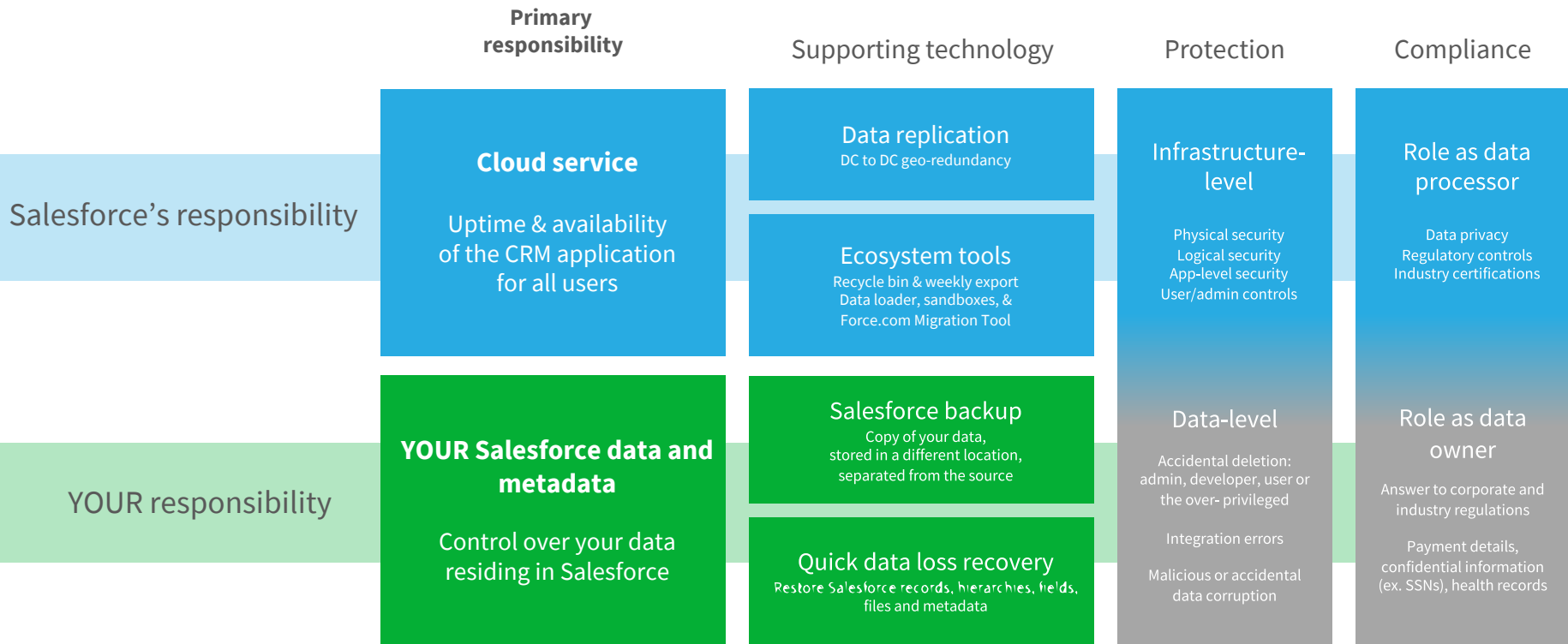
Salesforce

CRM Application   SaaS Infrastructure

The customer

Salesforce Data and Metadata

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Salesforce Shared Responsibility Model

	Primary responsibility	Supporting technology	Protection	Compliance
Salesforce's responsibility	**Cloud service** Uptime & availability of the CRM application for all users	**Data replication** DC to DC geo-redundancy **Ecosystem tools** Recycle bin & weekly export Data loader, sandboxes, & Force.com Migration Tool	**Infrastructure-level** Physical security Logical security App-level security User/admin controls	**Role as data processor** Data privacy Regulatory controls Industry certifications
YOUR responsibility	**YOUR Salesforce data and metadata** Control over your data residing in Salesforce	**Salesforce backup** Copy of your data, stored in a different location, separated from the source **Quick data loss recovery** Restore Salesforce records, hierarchies, fields, files and metadata	**Data-level** Accidental deletion: admin, developer, user or the over- privileged Integration errors Malicious or accidental data corruption	**Role as data owner** Answer to corporate and industry regulations Payment details, confidential information (ex. SSNs), health records

Best practices to back up Salesforce data

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

Resolution
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.

Third-party offerings
There are a number of data backup solutions offered by our partners on our AppExchange.

You can search for these by visiting the **AppExchange** directly and searching for keyword **backup.**

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Veeam Backup *for Salesforce*

Veeam Backup *for Salesforce*

…eliminates the risk of losing your Salesforce data and metadata —
so that your business is reliably protected.

Control and flexibility
Own your data, avoid backup and storage lock-in and deploy your backup
environment anywhere you choose.

Salesforce-native backup and recovery
Purpose-built for Salesforce using native APIs. Restore Salesforce records,
hierarchies, fields, files and metadata.

Quickly recover from data loss
Protect against human error, integration issues and other common Salesforce
data loss scenarios.

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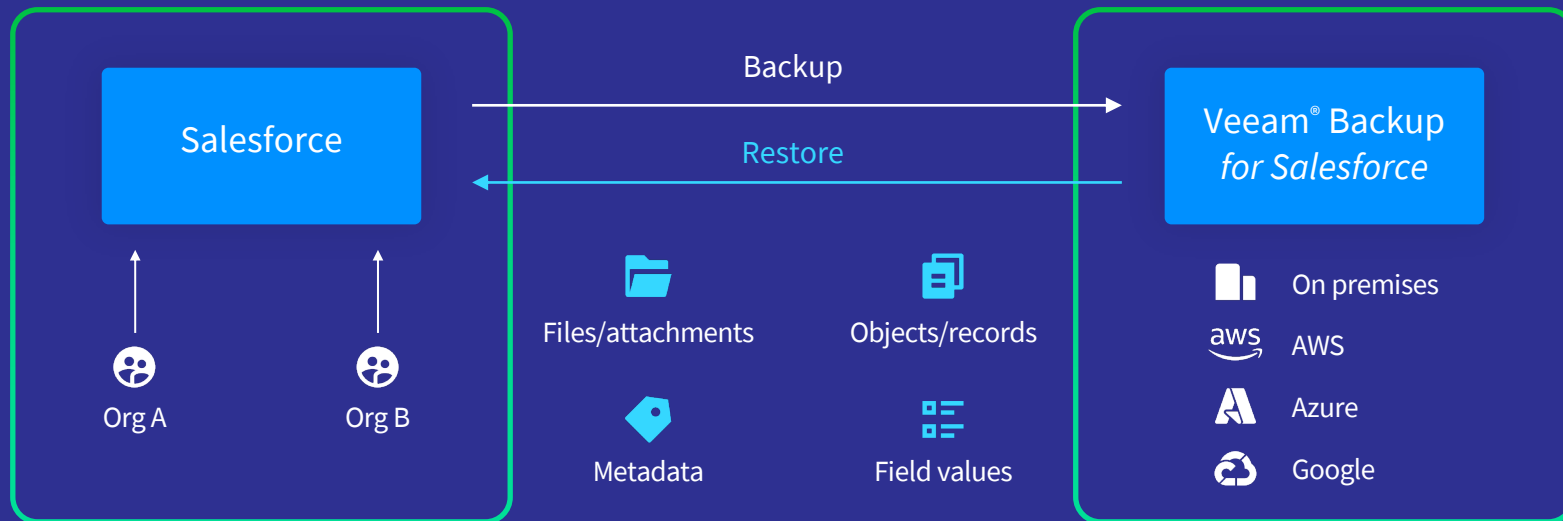
Use case example

Case #1:
responding to legal compliance

Case #2:
existing Veeam user
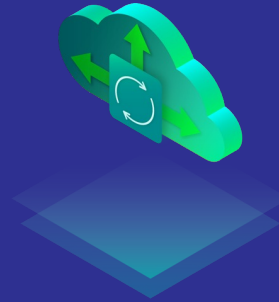
Case #3:
dealing with flexible restores

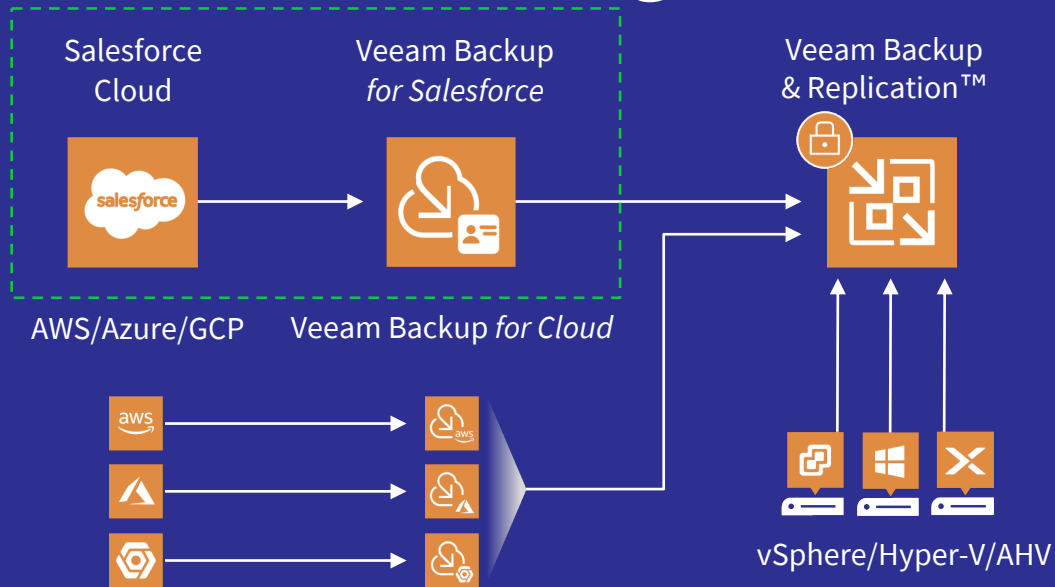**Case #4:**
backup consignment

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Case #1: responding to legal compliance

Cloud

Salesforce cloud

MSP

Veeam Backup *for Salesforce*

Backup

Compliant with laws and regulations
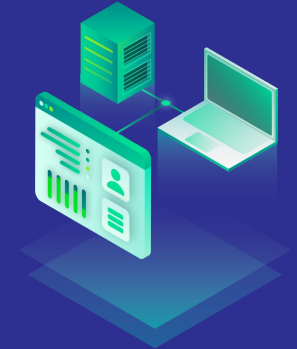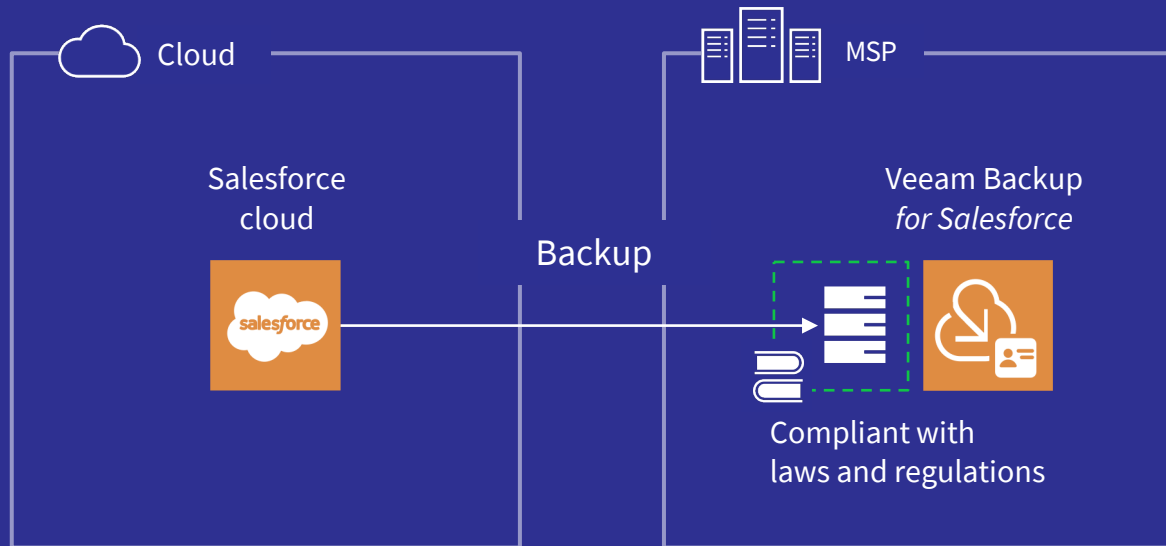
Healthcare customer is required to keep the data in-house due to compliance. Cannot use BaaS provider.

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Case #2: existing Veeam user

Salesforce
Cloud

Veeam Backup
for Salesforce

Veeam Backup
& Replication™

AWS/Azure/GCP   Veeam Backup *for Cloud*

vSphere/Hyper-V/AHV

Customer is an existing Veeam customer. Would prefer to protect Salesforce with the same vendor. Can leverage all the advantages of Veeam Backup & Replication for backup tiering and immutability.
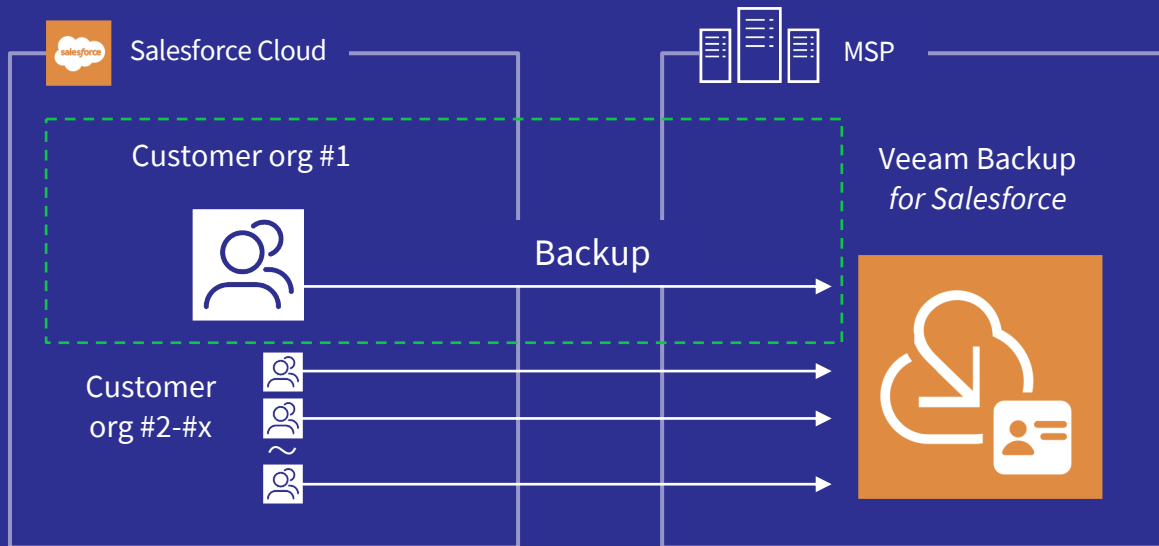
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Case #3: dealing with flexible restores

Veeam Backup *for Salesforce*

Search

Compare

Restore

Salesforce Cloud

Record

Field

Attachment

Meta data
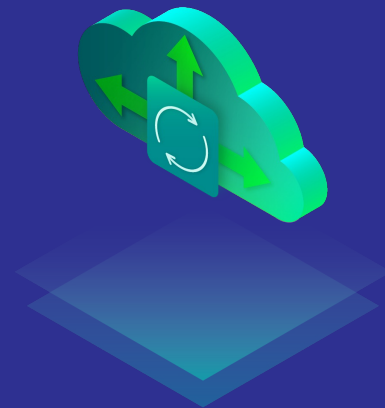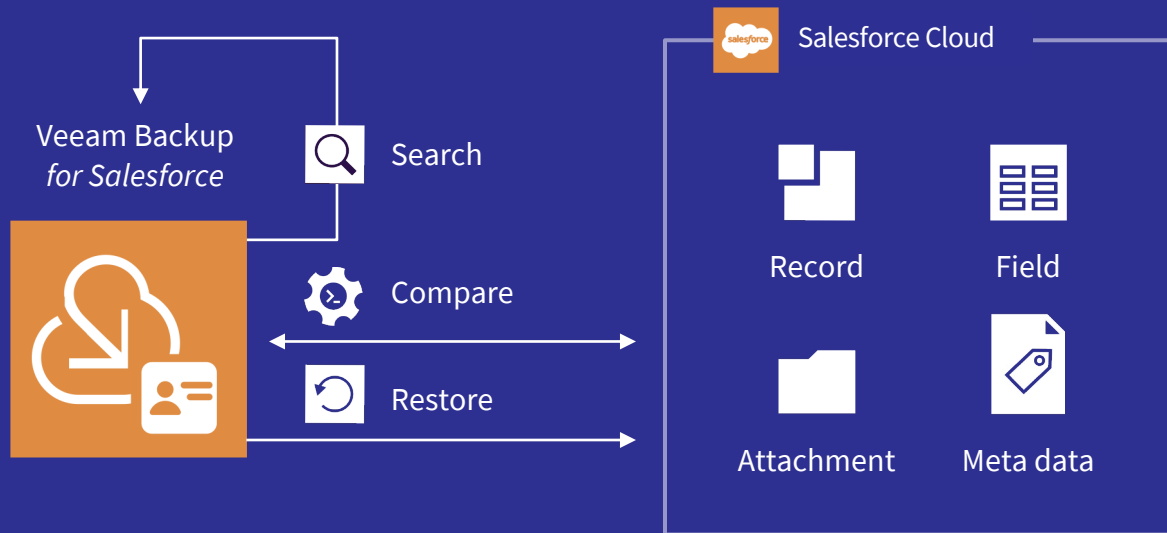
Customer is moving away from OwnBackup due to cost and inflexible restore functionality.

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Case #4: backup consignment

Salesforce Cloud

MSP

Customer org #1

Veeam Backup
for Salesforce

Backup

Customer
org #2-#x

~

Customer is looking for an MSP to manage their backups.
They don't want to manage SaaS themselves.

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Veeam Backup *for Salesforce* product details

Requirements
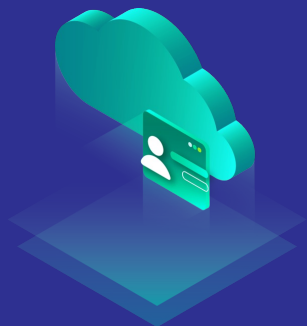
Hardware (min): 4 vCPU, 6GB RAM, enough space for file storage

OS: CentOS 7, RHEL 7/8, Oracle Linux 7/8

Engine: PostgreSQL 12-14 or PaaS* (ex. AWS Aurora PG)

Flash/SSD-based storage system (recommended)

On premises + on premises • Cloud + cloud • On premises + cloud

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Installation

1. **Install the RPM file.**
   (sudo yum install veeam-salesforce-0.0.1-xxx-e18.x86_64.rpm –y)

2. **Run the server configuration.**
   (sudo sh opt/vbsf/server-configuration.sh)

   1. Configure log retention settings.

   2. Choose PostgreSQL instance.

   3. Choose nginx settings.

3. **Do the initial configuration with the automatically generated URL.**

Initial configuration

1. Read and accept the license agreement.

2. Create the default administrator.

3. Connect to a PostgreSQL DB.

4. Provide a Veeam Backup *for Salesforce* license.

5. Create a SF connected app.

6. Connect to a SF organization.

7. Specify backup schedule settings.

8. Finish the wizard.

Backup options

- One and only backup policy per organization.

- Custom schedule for objects.

- Ability to set API limits.

- Optional backup of files and attachments.

- Custom retention policies per objects/files.

- Ability to keep all object versions.

Restore options

- Four restore types: deleted records, values, files, metadata.

- Powerful search options and data filters.

- Object hierarchy recovery: unlimited child, up to three parent levels.

- Overwrite existing records and field customization.

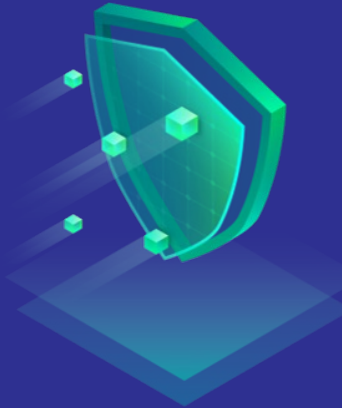- Work around user automation optically.

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DEMO

Veeam Backup *for Salesforce* vNEXT

Feature 1

Feature 2

Feature 3

Feature 4

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Packaging

PAID

Veeam Backup *for Salesforce*

- Standalone product, not part of Veeam Universal License
- $36 per user, per year.

FREE

Veeam Backup *for Salesforce* Community Edition

FREE forever, limited to organizations with 50 Salesforce licenses or less

PROMO

Promotional offer

Two 12-month introductory packages:

Up to 300 users - $2,000   Unlimited users - $10,000

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Salesforce protection trends 2022

To better understand the strategies, methods and personas involved in protecting Salesforce data, an independent research firm, surveyed 800 unbiased IT implementers in the spring of 2022:

400 Salesforce admins & developers
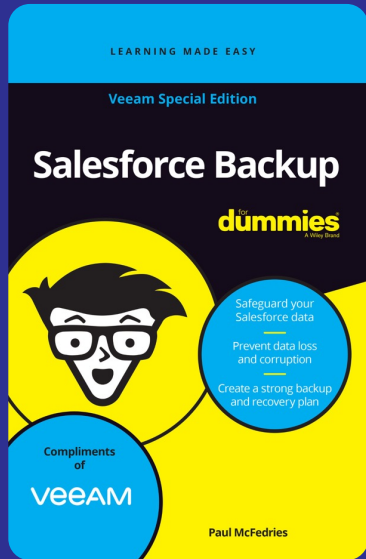200 backup administrators
200 IT operations

https://vee.am/sfdp22

Which of the following best describes the extent of your involvement with Salesforce within your organization? (n=800)

6%
9%
25%
15%
25%
19%
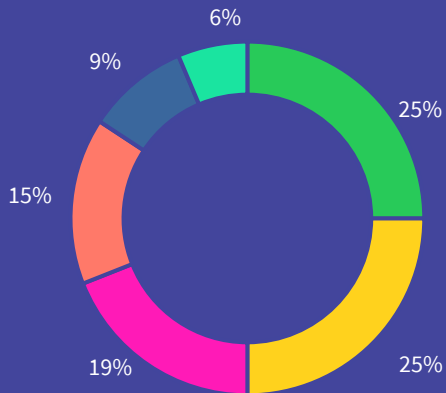
- IT Operations
- Oversees Salesforce Team(s)
- Salesforce Developer
- Backup Administrator
- Salesforce Admin
- Salesforce Consultant

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Helpful resources

https://www.veeam.com/wp-salesforce-backup-dummies.html

https://www.veeam.com/wp-salesforce-backup-reasons.html

https://vee.am/sfdp22

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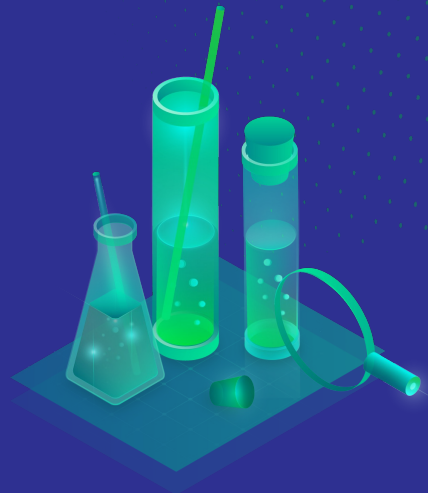# Actions

Educate SF
people/read reports

Define your
goals/strategy

Find appropriate tool
and TEST it!

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Thank you

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