NIGHTMARES

OF A SALESFORCE.COM ADMIN

How Salesforce Data Loss Can Keep You up at Night

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We've all been there. Tossing and turning while your mind races. Something terrible happens and...

you wake up realizing it was just a nightmare.

Today's Salesforce Administrators have lots to worry about but the majority of issues should (hopefully) not cause sleep deprivation. Lost data in a company's Salesforce account, however, is nightmare-inducing.

Company data isn't easily replaced. Purchase history. Communication preferences. Contact information. Payment methods. Personal information. Lose any of these and you might create a frustrated customer. Or worse: a former customer.

Deploying Salesforce was a smart choice. It's a powerful, reliable Customer Relationship Management data platform that employees can update with just an Internet connection and a browser or app. The Salesforce platform "worries" about uptime and updates while you simply access your data anywhere.

But that doesn't mean you are completely free of worry. Data loss happens. Duplicate records created. Inaccurate information overwrites accurate information. A manual backup is missed. A record or report is deleted. We've seen it all. Read on to learn about the nightmares caused by each of these data loss scenarios.

Don't let data loss nightmares keep you up at night. Stop counting sheep and get a solid night's rest.

NIGHTMARE #1

The Ominous Ticks of the Manual Backup Time Bomb

Tick. Tick. Tick. Picture this: you only have a set amount of time to export your Salesforce backup. It's like a ticking time bomb. If you don't log in to manually download your data file… well, that data could be changed or worse, deleted. BOOM!

Salesforce is an innovative solution, but the data export process seems pretty outdated. You can control some aspects of your data export, and you may choose to include images, documents and attachments, or even Chatter files. You choose what type of information is exported from a list of more than 60 data types. Typically, scheduled exports "include all data."

However, the limitations for Salesforce are around actually getting your data out of Salesforce. You are limited to exporting your data once every 28 days. If you use the Enterprise or Unlimited editions, however, you can schedule your exports as often as once every 6 days.

This is where we start kicking it old school. Although you can automate the backup run schedule, Salesforce requires users to "click to download" a data file. The download process is not automated; you have to log in and manually download the file.

The 48-hour clock (or as we think of it, time bomb) to download a backup data file starts ticking when the system emails the Salesforce Administrator that the backup file is available for export. In a bit of good news, the countdown clock extends on weekends.

For a System Administrator, this is not only old-fashioned, but also terrifying! Your data likely changes daily. However, all you have are weekly or monthly backup files that must be downloaded manually 48-hours after they're created. The backup time bomb keeps tick, tick, ticking away until you manually grab your backup file with the hope that none of the data has been altered.

## GET A BETTER NIGHT'S REST WITH AN AUTOMATIC BACKUP

To keep the ticking time bomb at bay, invest in a cloud-to-cloud backup solution. Backupify provides automated, daily backup of your data. You configure it once, then it just works. Your data is saved daily, not just every 6 or 28 days. And it is saved automatically, not just when you download it. You can sleep well every night of the year, knowing that your company data is safe.

Additionally, if you haven't set up a scheduled export of your Salesforce data for backup purposes, you should. (Do this at Setup | Data Management | Data Export.)

NIGHTMARE #2

The Poisonous Third-Party Package Problem

Third-party apps add useful features to Salesforce, but may also modify data in ways you didn't intend. Frightful!
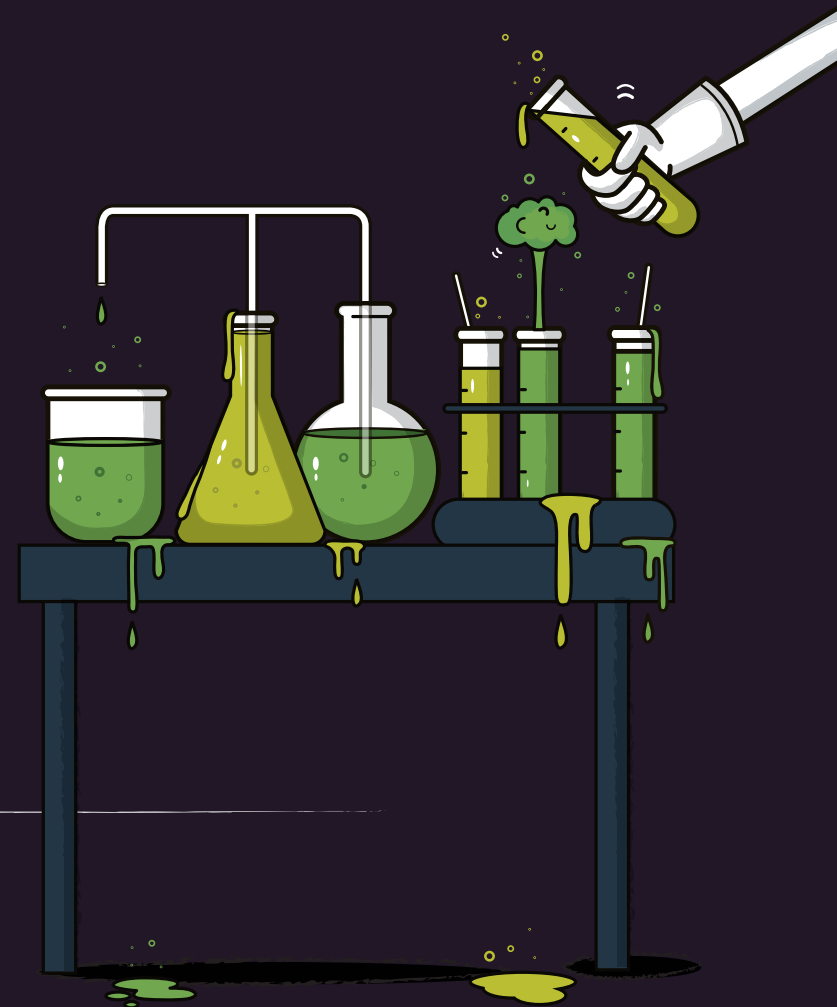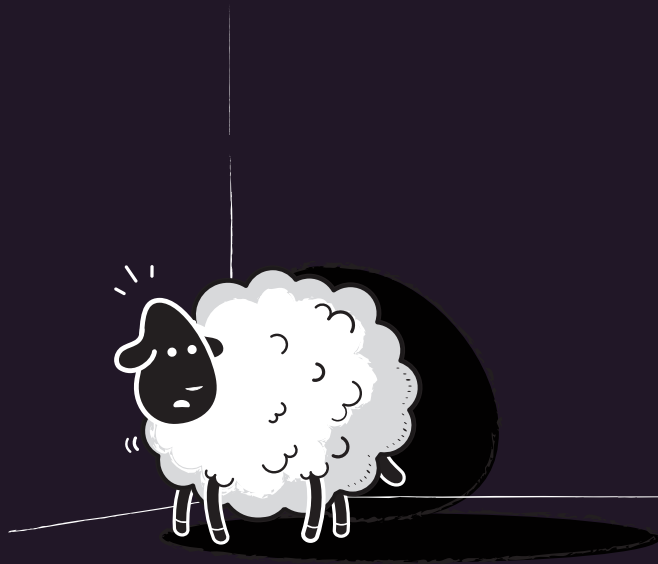
We love apps. Apps replace tasks and streamline workflows. We register for events with apps, track potential customers with apps, and create and sign contracts with apps. The place to look for apps is, of course, the AppExchange (appexchange.salesforce.com). These apps extend Salesforce's core functionality, and must be installed by a Salesforce Administrator to be used.

There are some third-party apps that present minimal data loss risk. For example, Salesforce.com's "Chatter Usage Dashboards" app uses Chatter activity information, but only for reporting so it doesn't change data. Another example is the type of app that simply adds data without changing customer information (similar to attaching a Google Doc to a Salesforce contact record -- customer data remains unchanged). But, there are apps that change data, and are therefore a risk to your data. These apps can change data stored in Salesforce Objects and Fields -- overwriting, modifying or even deleting existing data in undesirable (and super scary) ways.

Package problems can result from installed apps that are flawed, not properly updated, or not maintained. These apps are dangerous right from the start and act like a poison to your Salesforce account. You do NOT want to add poison to your Salesforce instance.

Before installing a potentially poisonous app, pay attention to the package type. Salesforce packages may be managed or unmanaged. Managed packages are maintained by an organization using the Salesforce Developer Edition and may be updated by that organization. In contrast, unmanaged packages can be customized or changed only by organizations that installed the packages. To upgrade an unmanaged package, you'll typically uninstall, then reinstall the new version. (Many unmanaged packages are open source projects or components that provide a specific, limited function.) With managed apps, support questions may be directed to the developer.

ET A BETTER NIGHT'S REST BY PAYING CLOSE ATTENTION TO PACKAGE DETAILS

To troubleshoot package problems, first view the list of installed packages by going to Setup | Installed Packages. If the problem package is a managed app, contact the publisher: the publisher's name should be displayed. If the problem package is an unmanaged app, make sure you've upgraded to the most recent version. And as a sort of safety antidote, always uninstall apps you no longer use or need.

NIGHTMARE #3

Creating a Monster through Third-Party Customization Conflicts

As companies attempt to customize their Salesforce instance, the result is often unwanted changes to Objects or Fields. It's a bit reminiscent of Frankenstein's infamous monster! While a third-party app may be beneficial on its own, installing it improperly (by inaccurately configuring the settings) could have catastrophic consequences.

Installed apps may add Custom Objects, which are similar to conventional relational database tables. You may already be familiar with at least a few of Salesforce's standard Objects, such as Contacts, Accounts, Leads, and Opportunities. For any Salesforce newbies, a Custom Object is typically used to track information specific to an organization.

Apps may also add or modify Fields. A Field tracks an individual item of data, such as a first name, phone number, or email address. A third-party email app might add a checkbox field to indicate "do not email," then sync this information with their system.

Both Custom Objects and Fields may cause complications. For example, names for Custom Objects in unmanaged apps could conflict. Fields added by two different apps may cause confusion: different users entering data in different places. It's all starting to get messy and scary because this kind of error also produces useless reports when different reports pull data from similarly named, but different Fields.

Sure, the idea of making your Salesforce instance customized and more effective sounded good at the time, but it's all gone horribly wrong. The changes to Objects and Fields from the installed app are totally nightmarish for your data.

GET A BETTER NIGHT'S REST BY CAREFULLY REVIEWING CUSTOM OBJECTS AND FIELDS

When it comes to troubleshooting customization conflicts, first view the list of Custom Objects at Setup | Create | Objects. Review the list of custom objects to ensure there are no conflicts or potentially duplicated sets of data. Next, look for potential problems with Fields. This is harder to troubleshoot, as there are many standard objects. Go to Setup | Customize. This will display the list of standard objects. From there, choose the object you want to review, then choose Fields. For example, to review Account fields, choose Setup | Customize | Accounts | Fields. Standard fields are listed first, with custom fields listed below. Take the time to review all your Custom Objects and Fields, you'll avoid creating a monster of a data problem.

GET AN EVEN BETTER NIGHT'S REST: THE SANDBOX SOLUTION

To avoid poisoning your Salesforce instance or creating Frankenstein's monster, a Sandbox provides a test environment that is separate from your production Salesforce environment. Create a Sandbox (Setup | Data Management | Sandboxes) to identify potential issues in a test environment, before "live" deployment. Sandbox versions range from a configuration-only Sandbox to ones containing some (or all) of your organization's data.

But a Sandbox isn't a safety net; you should also protect your data during deployment and only data backup can do that. Use the Sandbox to test before you deploy. But use Backupify to back up before you install an app or customize your configuration.

NIGHTMARE #4

Trapped in a Tangled Web of Mismapped Data

You call a contact and reach a main office number, as opposed to the contact's direct number. You send an email to a generic email address, not a personal email address. You've got conflicting contact information on your hands. The contact details in your Salesforce account has become a tangled web of inaccurate data. Where does it begin and end? You're wrapped in a scary web of false information.

Where did it go wrong?
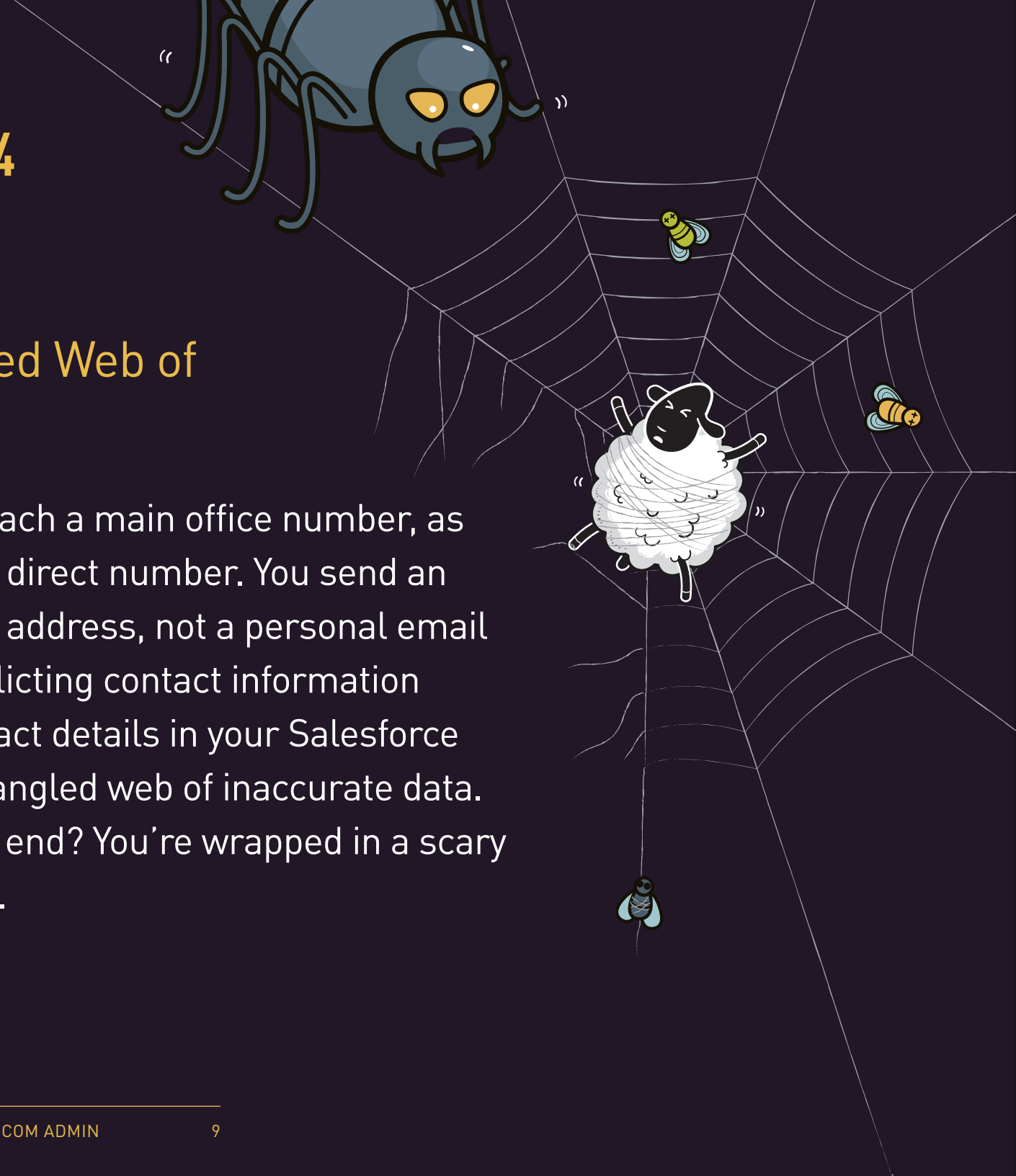
The web of inaccuracies most likely resulted from importing data into your Salesforce account. Looking back, before you ever import data into Salesforce, you handle your data cautiously. You map fields to make sure you import phone numbers to the phone number field. You check for duplicates. You delete unnecessary columns, then export your data. You import names, email addresses, and phone numbers with Salesforce's "Import Wizard for My Contacts." The wizard walks you step-by-step through the import process. You finish the import. Everything looks fine.

But accurate data isn't always the best data. A correct email address or phone number for a person might not be the best email address or phone number. Importing accurate data may easily overwrite better data that already exists in your database.

Contact nightmares scale nicely, helping the web grow. An Administrator might use the "Import My Organization's Accounts & Contacts" wizard with similar results. The difference is that an Administrator's import overwrites account and contact data for multiple users. Contact information is now accurate but of lower quality for everyone. How chilling.

GET A BETTER NIGHT'S REST BY BACKING UP YOUR DATA

Fortunately, Salesforce provides a "Mass Delete" option. If identified immediately, a data import problem can be corrected. But only a Salesforce Administrator can "Mass Delete" information and the option is of little use if the problem isn't identified quickly.

The solution is deceptively simple: back up your Salesforce data before an import. Use Backupify to initiate a backup, then download your accounts or contacts before a major import. Avoid becoming entangled in a sticky, vile web of erroneous data.

NIGHTMARE #5

Reckless Gremlins Wrecking Your Reports

A benefit of SaaS applications such as Salesforce.com is the ability to easily collaborate with co-workers. But what happens when these colleagues morph into gremlins and start editing or worse deleting critical documents or reports that you've shared with them? Reliable reporting is crucial and you can't have gremlins wreaking havoc on your reports.

Reliable reports require reliable filters. Try contacting customers using a list that mistakenly contains former customers or projecting sales using a report that omits this year's projections.

Private reports within Salesforce are protected. When you work with reports saved to a private folder, you can run reports with confidence. No one else has access to the reports, so you're the only one responsible for changes.

Public reports are another story and may be problematic. Reports saved to a public folder are shared, which means other users can access, modify, or even delete reports – or the entire folder. This is how nightmarish problems occur. The reliability of shared reports depends on the behavior of users with access to the reports. Imagine how terrifying it could be if mischievous gremlins started changing and deleting crucial data from your Salesforce account? Let the nightmare begin.

Users can share more than reports within Salesforce. Shared folders may contain shared documents, dashboards, or email templates, thus giving these malicious gremlins in your company access and entrusting them with this crucial data.

Shared folders can be set to read-only which would seem to solve many problems: users wouldn't be able to modify report settings. No more scary issues, right? Wrong. As it turns out users (gremlins) with "Manage Public Reports" permissions would still be able to modify settings. And rename, change, or delete reports.
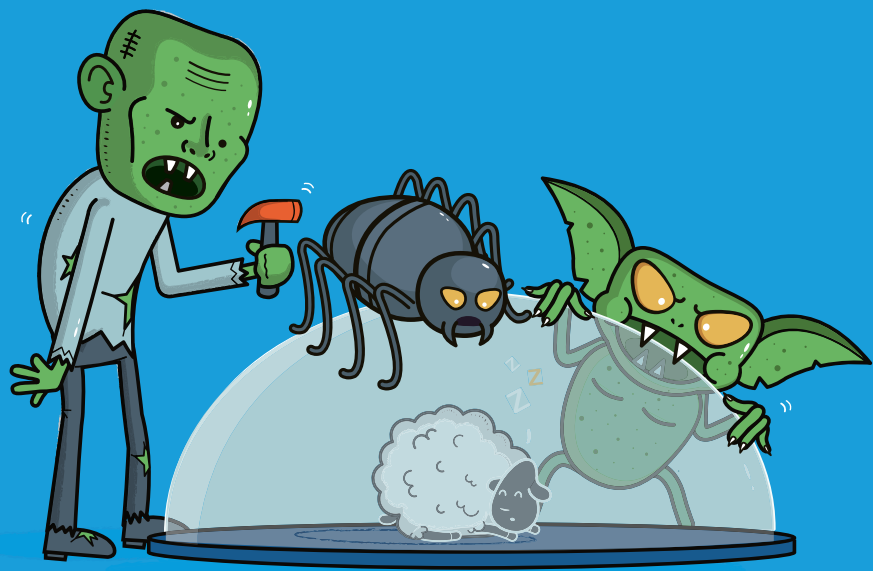
GET A BETTER NIGHT'S REST BY IMPLEMENTING A CLOUD-TO-CLOUD BACKUP SOLUTION

So, as long as folks with those "Manage Public Reports" permissions don't make any unexpected changes, everything will be fine. Unfortunately, that's not always the case.

Locking down routine reports makes sense and seems to be the right solution, but locking down the ability to collectively share, explore, and modify all reports simply isn't feasible: it locks down the opportunity to truly understand your business.

You should open up the reports. Share the data. Let people dig into the details. Don't lose sleep over renamed reports, forgotten filters, or misconfigured permissions. Use a cloud-to-cloud backup solution such as Backupify to automatically save your reports for you. Backupify even backs up metadata so that reports (and their associated sources and filters) are entirely secure – even from gremlins.

If you're a Salesforce Admin up at night, counting sheep to achieve a peaceful night's rest, consider your data – perhaps it's keeping you up at night. There are processes and technology solutions to help ensure you have your Salesf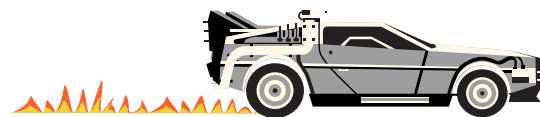orce data in order but remember: