

# 5 Strategies to Protect Your Salesforce and Increase Peace of Mind

A new way to meet your IT Department's needs

Microsoft  
Partner

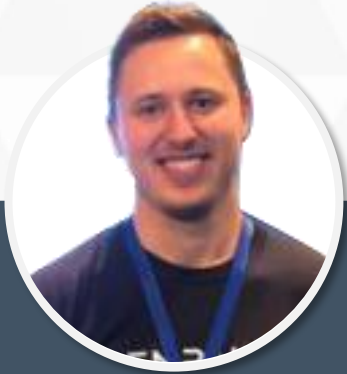


Gold Application Development  
Gold Collaboration and Content  
Gold Cloud Productivity  
Gold Messaging  
Gold Datacenter

***Collaborate with Confidence***

Accessible content is available upon request.

# Today's Speakers



## Ben McCarthy

Founder, Salesforce Ben

*I've been working in the Salesforce ecosystem ever since I graduated from University in 2012, and now I'm hooked! I've held various roles over the years working for end-users, ISV's, and founded a UK-based Salesforce consultancy. As well as my role at SalesforceBen.com, I am also a Non-Executive Director at Cloud Orca, a London based Consultancy.*



## Funtrol Ready

Manager Solution Engineering

*Funtrol is a solutions-oriented IT professional with over 20 years of experience directing a broad range of corporate IT solutions in public and private sector verticals including healthcare, financial services, and utilities. At AvePoint, Funtrol helps customers solve business challenges in today's modern workplace by leveraging AvePoint solutions..*





# *Agenda*

- 1. Data Protection**
- 2. Sensitive data masking**
- 3. Data Monitoring**
- 4. Workflow Considerations**
- 5. End-user self service**



Organizations have a need to  
**Protect customers'  
data and ensure  
business continuity**  
**with Salesforce**



## Challenges

- 1 Recovering from crashes and user errors
- 2 Salesforce native data recovery limitations
- 3 Not enough restore flexibility
- 4 Cost/time wasted due to data loss and recovery
- 5 Business or regulatory requirements



# Common Data Loss Scenarios...



## User-Driven Errors

"We've identified around 2000 contacts that have been added incorrectly to our Salesforce org via the Salesforce for Outlook plugin"

"Someone updated the contacts for our account, that's not in the recycle bin..."

## Admin-Driven Errors

"I have an example where 32,000 records were accidentally deleted (not by me). The fix was to go through the recycle bin and undelete them page by page."

"With tools like the Data Loader, it is very easy to mass delete or update records. And a simple mistake in your source file or field mapping could spell disaster for your data."





## More Common Data Loss Events...

### Admin-Driven Errors

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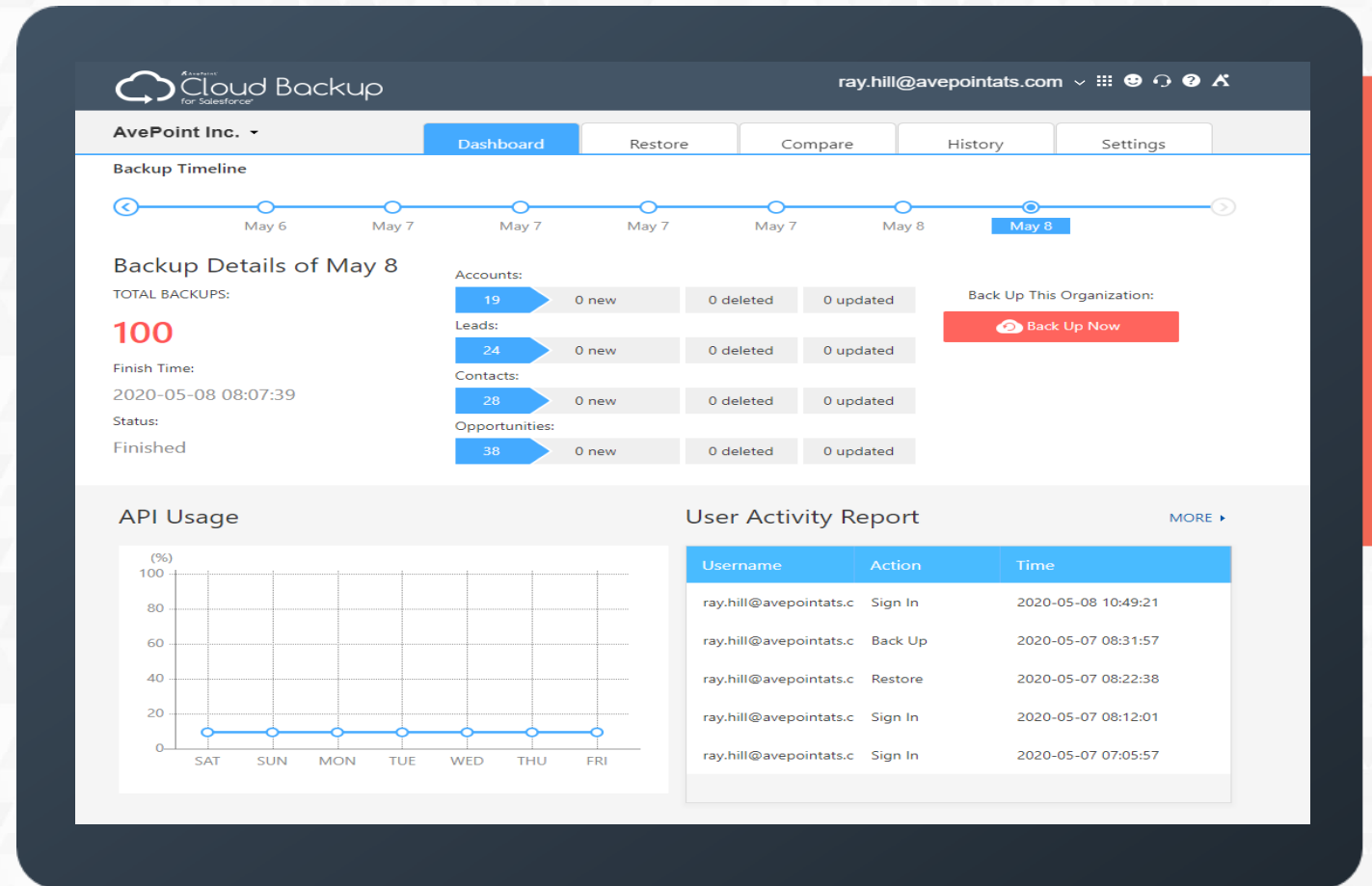
"With tools like the Data Loader, it is very easy to mass delete or update records. And a simple mistake in your source file or field mapping could spell disaster for your data."



### Why do I need to backup my metadata?

Just as it is easy for users to accidentally delete records or modify records, it is also easy for administrators or developers, and users with advanced permissions, to make changes to your configuration settings, such as adding or deleting custom fields, modifying page layouts, deleting or changing Reports and Dashboards, or modifying custom code. **As many of these changes are not reversible, it is important to have a copy of your metadata to fall back on in the event that you need to restore prior settings.**

# 1. Prevent data loss and enable business continuity for Salesforce



## 2. Mask and anonymize sensitive data when populating sandboxes

The selected fields will be cleansed. Audit fields are not supported, and fields related to other integrity.

<input type="checkbox"/>	Field
<input checked="" type="checkbox"/>	LastName
<input checked="" type="checkbox"/>	FirstName
<input checked="" type="checkbox"/>	Name
<input checked="" type="checkbox"/>	OtherStreet
<input checked="" type="checkbox"/>	OtherCity
<input checked="" type="checkbox"/>	OtherState
<input checked="" type="checkbox"/>	OtherPostalCode



3. Trigger alerts for bulk changes to stay on top of any major changes and eliminate disruptions for your end-users.

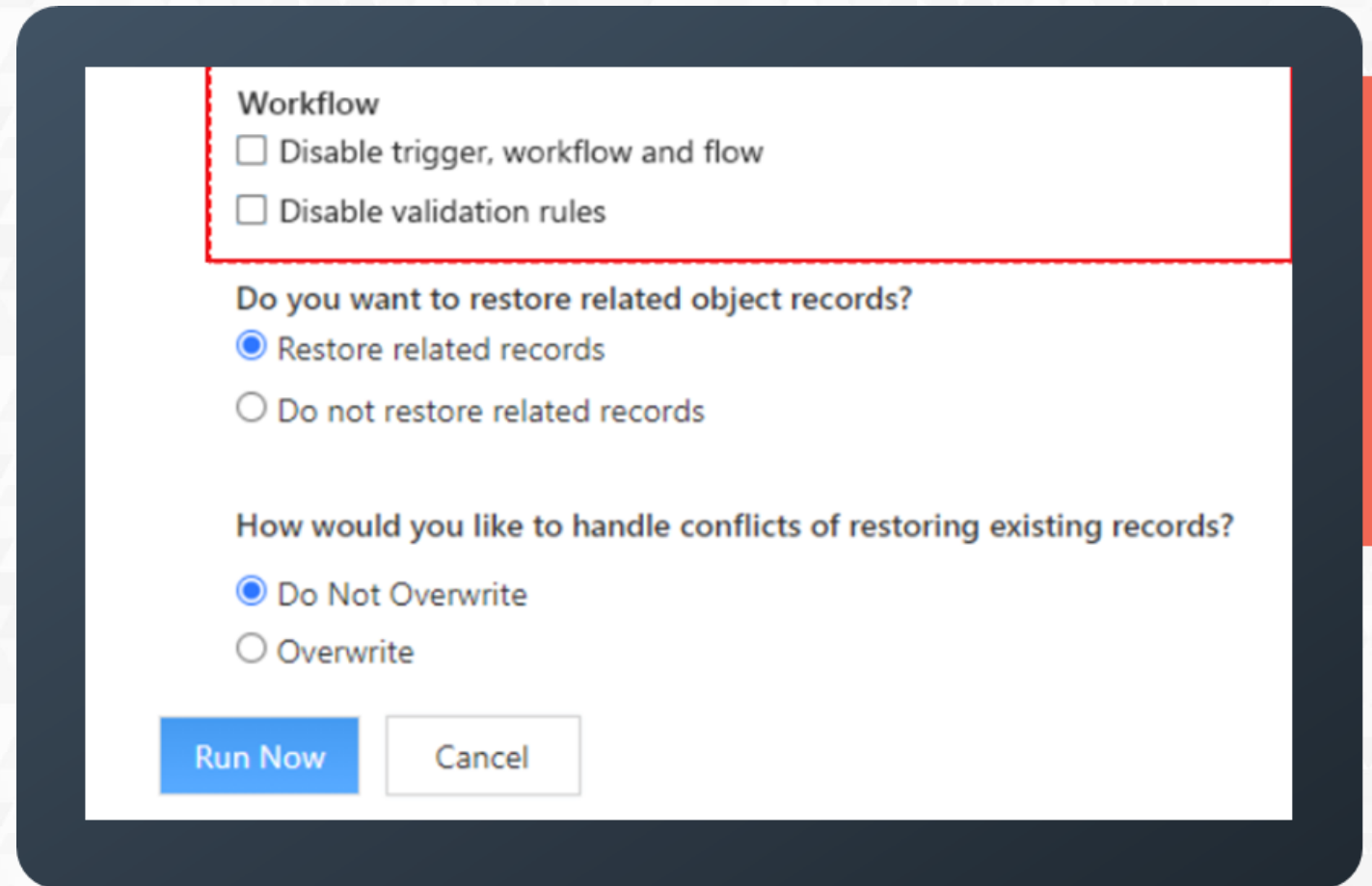
The screenshot displays the 'Configure Data Monitor Alert' interface. At the top, the breadcrumb navigation shows 'Settings > Data Monitor Alert > Configure Data Monitor Alert'. Below this, a message states: 'An alert email would be sent to users with permission when **ANY** of these enabled rules are triggered.'

The main part of the interface is a table with the following columns: Object, Operation, Condition, Records Number, Enable, and Action. The table contains four rules:

Object	Operation	Condition	Records Number	Enable	Action
Account	Update	>=	10	<input checked="" type="checkbox"/>	
Contact	Remove	>	5	<input checked="" type="checkbox"/>	
Lead	Add	<=	5	<input checked="" type="checkbox"/>	
Opportunities	Add	<	1	<input checked="" type="checkbox"/>	

Below the table, there is a link '+ Add a new rule'. At the bottom of the configuration window, there are 'Save' and 'Cancel' buttons. The entire configuration window is set against a background that includes a 'Manage' button at the bottom right, which is highlighted with a red border in the original image.

4. Ensure that workflows and triggers are deactivated to minimize interruptions.



The screenshot shows a configuration window with a dark blue border. A red dashed line highlights the 'Workflow' section at the top. Below this section are two radio button options for restoring related object records, followed by two radio button options for handling conflicts. At the bottom are 'Run Now' and 'Cancel' buttons.

**Workflow**

- ☐ Disable trigger, workflow and flow
- ☐ Disable validation rules

Do you want to restore related object records?

- ☒ Restore related records
- ☐ Do not restore related records

How would you like to handle conflicts of restoring existing records?

- ☒ Do Not Overwrite
- ☐ Overwrite

**Run Now** **Cancel**

## More Common Data Loss Events...



### User-Driven Errors

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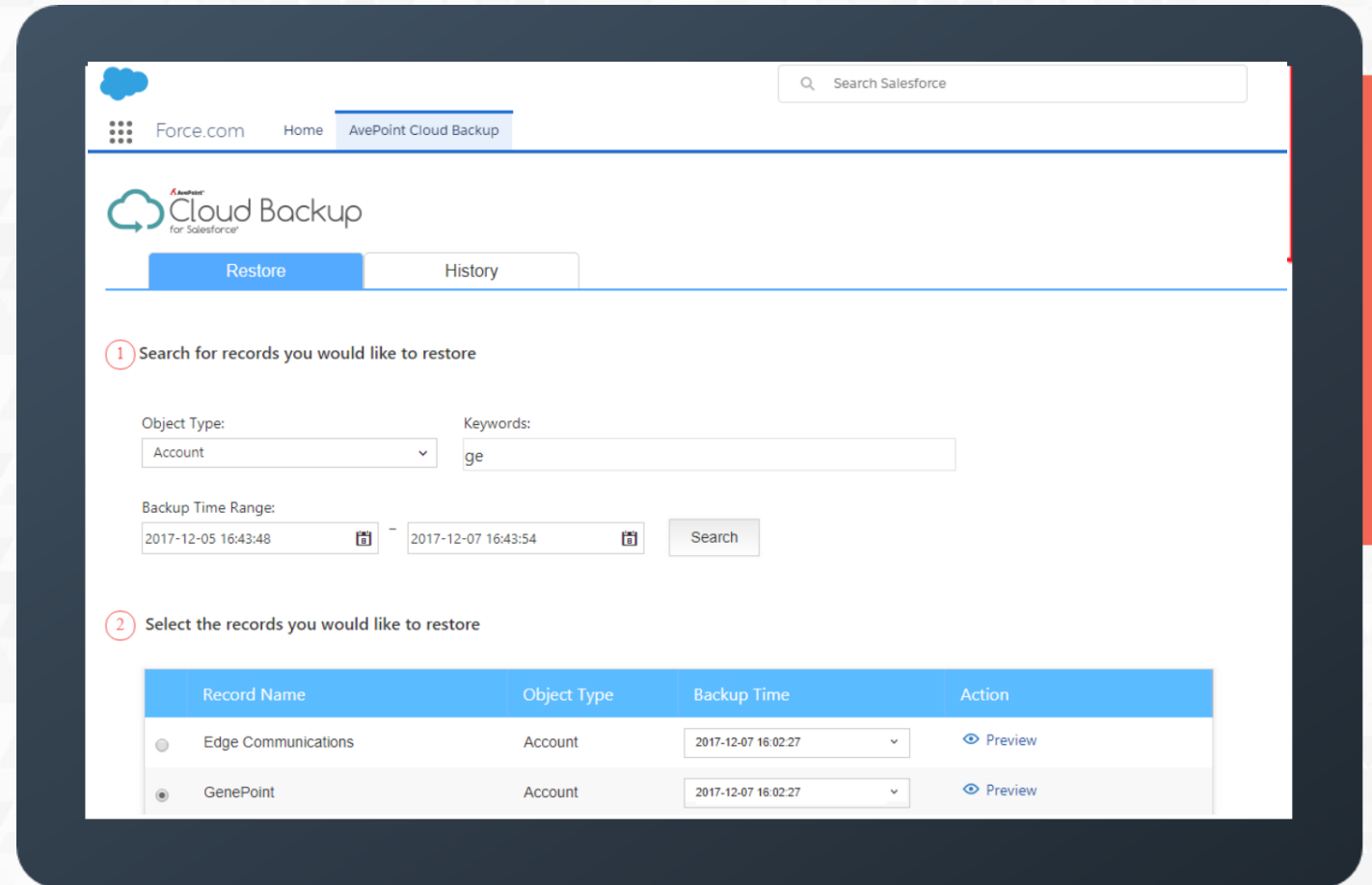
"Someone updated the contacts for our account, that's not in the recycle bin..."



### Why do I need to backup my data?

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. With tools like the Data loader, it is very easy to mass delete or update records. And a simply mistake in your source file or field mapping could spell disaster for your data. **It is recommended that you keep a regular backup of your data** and to do a manual point-in-time backup before you proceed with any major data project within your organization.

## 5. Enable end users to self service tasks such as records restore





# Organizations have stringent protection, retention, and recovery SLAs for critical data



## Challenges

Limited scope when it comes to data protection, leaving organizations vulnerable to cyber attacks or human error



## Ideal Solution

You need a one-stop-shop to protect all critical data with built-in best practices that simplify Salesforce administration.



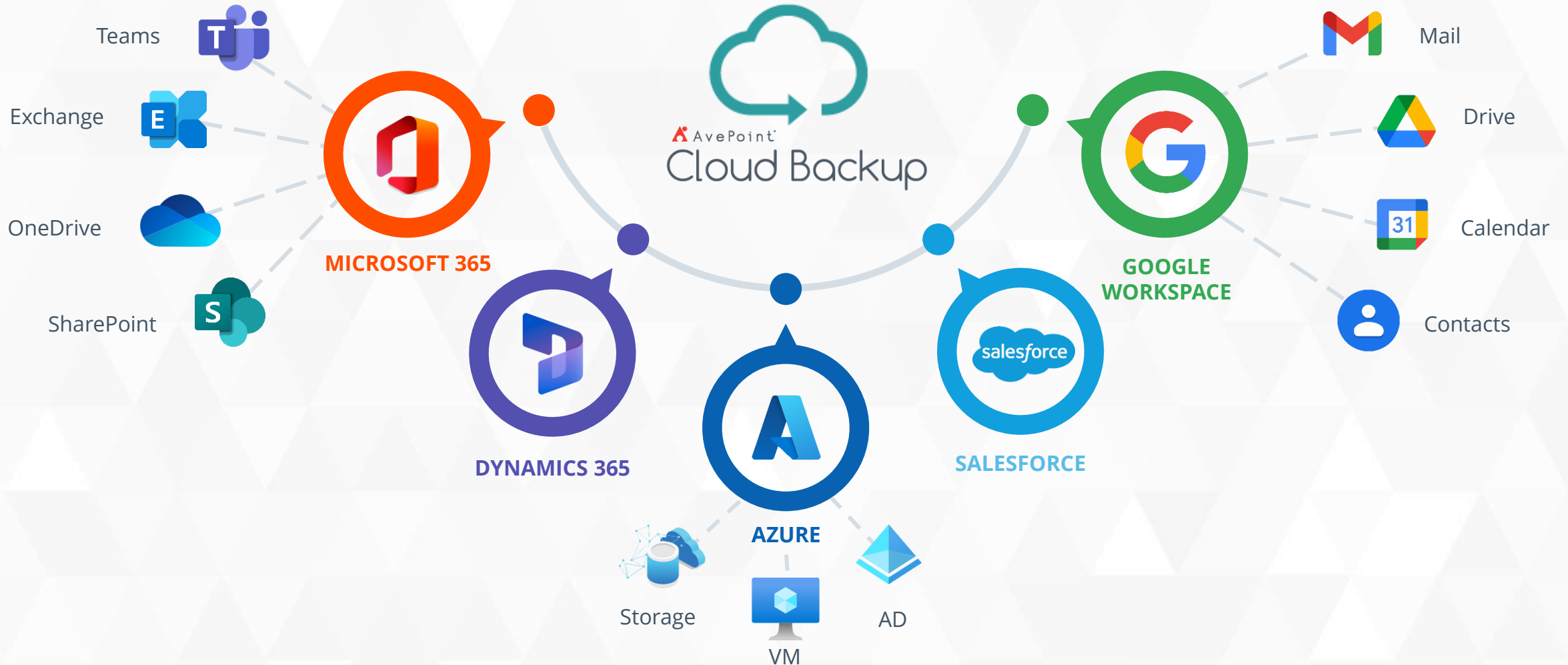
## Desired Outcomes

- Satisfied SLAs to meet regulatory or organizational requirements
- Minimized data loss and downtime – no matter the cause of disruption
- Trust in the CRM tool– so users feel confident to store critical customer data in the cloud



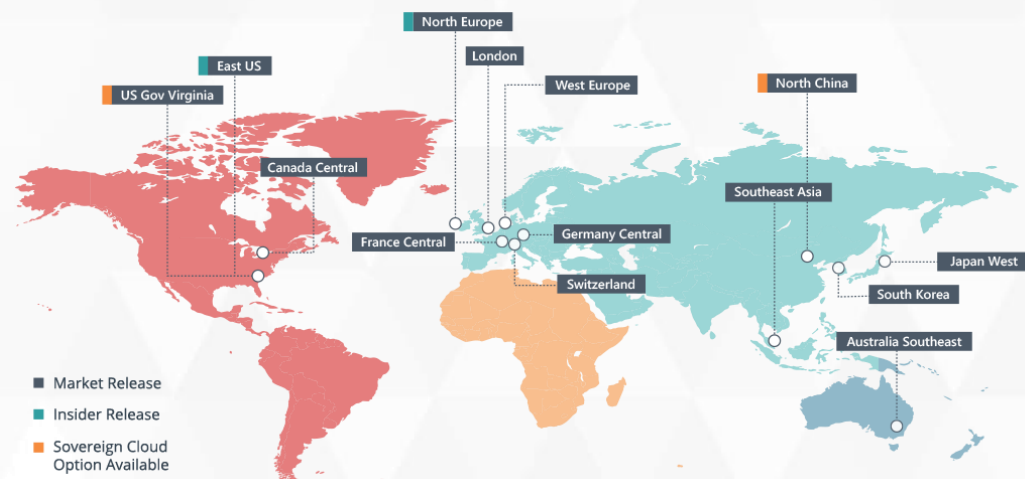
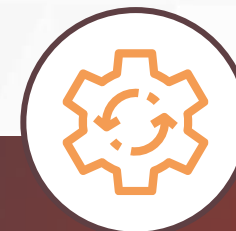
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a comprehensive cross-platform multi-cloud backup and restore solution





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24/7 World-Class Support

100+PB Managed Customer Data

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9M Cloud Users

88 Countries

7 Continents

AvePoint<sup>®</sup> is headquartered and maintains its principal operational center in Jersey City, NJ, with approximately 1,500 employees across five continents.

### AOS-USG

Our cloud services are a FedRAMP (Moderate) Authorized SaaS solution for use across all agencies. We received agency-sponsored authority to operate (ATO) in April 2021.



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*thank  
you*



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