

GUIDE

Mastering Salesforce Data Management: A Guide to Streamline Your Business

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Is your Salesforce org slowing down? Struggling with rising storage costs or cluttered reports? These are more than just admin headaches, they're signs that your **Salesforce data management strategy** might need attention. As your org evolves, the volume, complexity, and sources of data continue to multiply. But without a plan in place, data growth in Salesforce can quickly overwhelm your systems and your teams.

Why does this matter now more than ever? Every click, transaction, and integration adds to your data stack. What starts as valuable business intelligence can turn into clutter if left unmanaged. Performance lags, compliance risks, and poor user experience are all real consequences of unchecked data growth in Salesforce. That's why the importance of data strategy can't be overstated, it's the backbone of a scalable, secure, and efficient Salesforce environment.

So, what can you do about it? Proactive Salesforce data management isn't just about cleaning up old records. It's about putting a smart, forward-looking system in place that helps your teams access the right data, at the right time, for the right reasons. In a world where data drives decisions, recognizing the importance of data strategy is what sets resilient, high-performing businesses apart.

| Understanding Salesforce Data Management

Salesforce data management starts with knowing your Salesforce data types. It's not just standard records; your org holds standard objects (like Accounts and Contacts), custom objects tailored to your business, plus attachments, emails, files, Chatter posts, logs, and more. These various Salesforce data types all occupy storage, and not all of them contribute equally to day-to-day operations.

But is all data the same? Not quite.

Salesforce data typically falls into three categories:

- Active data is accessed and updated regularly, it drives your workflows.
- Inactive data is rarely touched, but still taking up space.
- Historical data is no longer in use but must be retained for compliance or audits. Smart Salesforce data architecture ensures each type is stored appropriately, so your system stays fast, compliant, and cost-effective.

Read more: [Are You Ready to Pay Additional Data Storage Costs in Salesforce?](#)

| Common Salesforce Data Management Challenges

Even with Salesforce's powerful CRM capabilities, many organizations run into persistent **Salesforce data management challenges** that affect performance, compliance, and long-term scalability. Are you facing any of these issues?

Salesforce Storage Problems & Performance Degradation

Salesforce storage problems are more common than you think; limited space and high costs can quickly become an operational burden. Large data volumes also degrade performance, slowing reports, dashboards, and searches across your org.

Data Inaccessibility & Scattered Records

To avoid high storage costs, many teams move or delete less-used data, which leads to operational silos. Scattered data, across attachments, files, and custom objects, only adds to the problem. This is one of the major Salesforce data management challenges businesses struggle with daily.

Manual Effort & Salesforce Data Recovery Issues

Manual processes waste time and are error-prone. Worse, when data is lost, many discover Salesforce data recovery issues, such as limited restore capabilities for related records and missing metadata. It's a hidden risk in everyday operations.

Salesforce Compliance Issues & Backup Limitations

Industries like healthcare, finance, and legal face strict retention and audit demands. Yet many backup solutions don't preserve metadata or access controls, leading to serious Salesforce compliance issues and Salesforce backup limitations that compromise recovery and regulatory readiness.

From Encryption and Access Control to Seamless
Integration with Cloud Infrastructure, DataArchiva Protects
Over 750 TB of Data.

Download the Datasheet

| The Need for Data Archiving in Salesforce

Salesforce is built to help teams move fast, but as your org grows, so does your data. If left unmanaged, that data can impact performance, inflate costs, and create compliance risks. That's where Salesforce data archiving comes in.

What is Data Archiving?

Data archiving in Salesforce involves moving historical or infrequently accessed data, such as closed cases, old records, or system logs, out of your active production environment while retaining secure access. Organizations often archive Salesforce records to improve performance and reduce reliance on high-cost storage.

Native Salesforce Archiving vs Third-Party Archiving

Features	Native Salesforce Archiving	Third-Party Archiving
Technology Used	Uses Big Objects for storage	Leverages external storage cloud platforms
Functionality	Basic archiving with limited automation	Advanced scheduling, querying, and reporting
Cost Impact	Some cost relief, but limited scalability	Designed for long-term cost optimization
Customization	Limited flexibility	Highly customizable and compliance-ready

Native Salesforce archiving relies on Big Objects, which are great for storing large volumes of data inside Salesforce. However, they come with limitations in querying and real-time access. Third-party solutions provide more control, automation, and cost-efficiency, especially for large datasets and regulated industries.

7-Year Salesforce Data Retention? This Metrology Firm Did It **with DataArchiva**

[Download the Case Study!](#)

Why Archive Salesforce Records?

Improve Performance

A leaner org means faster reporting, quicker searches, and better user experience.

Cut Costs

Avoid paying for expensive Salesforce storage by archiving historical data elsewhere.

Meet Compliance Goals

Retain necessary records for audits, legal holds, or internal policies, without keeping everything in production.

When to Use Salesforce Data Archiving

Ideal scenarios where it makes sense to archive Salesforce records:

- Closed or resolved service cases.
- Inactive opportunities, leads, or accounts.
- Historical logs and event tracking data.
- Field history records are stored for auditing.
- Large-volume objects with low access frequency.

Home Warranty Provider Secures Salesforce ROI with **DataArchiva's Archival Solution**

[Get the Case Study!](#)

| The Need for Data Backup in Salesforce

Think your Salesforce data is fully protected? Think again. While Salesforce secures the platform, backing up your data is your responsibility, and skipping it puts your business at serious risk.

What is Salesforce Data Backup and Why it Matters

Salesforce data backup means securely copying your data and metadata so you can recover from mistakes, sync errors, or even malicious attacks. Without it, a single wrong move, like a bad import or accidental deletion, can lead to major disruptions.

Why Data Loss Happens

- Human errors (accidental deletes or updates).
- Faulty integrations or automations.
- Corrupt imports or sandbox refreshes.
- Malicious actions or insider threats.

When that happens, can you quickly restore deleted Salesforce records? If not, you’ve got a problem.

Weekly Export ≠ Real Backup

Salesforce’s weekly export is manual, limited, and doesn’t include metadata. It’s not enough to reliably back up Salesforce data or recover it fast.

Why You Need Automated Salesforce Recovery Solutions

- Set it and forget it: Automated daily or hourly backups.
- Full coverage: Data + metadata.
- Point-in-time recovery: Instantly restore deleted Salesforce records.
- Compliance-ready: Support for audit trails and retention policies.

| Key Differences: Archiving vs Backup

Criteria	Backup	Archiving
Purpose	Protect and recover data in case of loss or corruption	Move older, less-used data out of active storage to improve performance and reduce costs
Retention & Retrieval	Short- to medium-term storage for fast recovery of recent data	Long-term retention of historical data that may not need frequent access
Compliance & Recovery	Supports disaster recovery and data loss prevention; enables full or selective restores	Supports regulatory compliance by keeping data accessible and audit-ready without cluttering production

When to Use	When you need to back up Salesforce data regularly and restore deleted Salesforce records quickly	When your org is growing and needs to reduce storage usage while retaining data for reporting or compliance
Ideal for	Accidental deletions, integration errors, and metadata recovery	Closed cases, old opportunities, historical logs

Understanding the differences between backup and archiving is critical for a complete data strategy. In most cases, it's not Salesforce backup vs archive, it's both. Each plays a unique role in keeping your org secure, compliant, and optimized.

I Choosing the Right Archiving Strategy

As your Salesforce org scales, effective data management becomes critical, not just for performance, but for compliance and cost control. That's where a smart **Salesforce archiving strategy** comes in. But how do you decide between native or external archiving? Let's break it down.

Native Archiving with Salesforce Big Objects

Salesforce offers a built-in **archiving solution using Big Objects**, a storage model designed to handle large volumes of historical data within the platform.

Gains:

- Seamless integration within Salesforce.
- Can store billions of records.
- Supports retention without deleting data.

Limitations:

- Limited querying and reporting capability.
- Requires technical setup via Async SOQL.
- Not ideal for complex access or analytics.

While **Salesforce Big Objects** are suitable for basic archiving, they may fall short when it comes to flexible data retrieval, performance, and cost-efficiency at scale.

External Archiving for Salesforce (AWS, Azure, GCP, etc.)

For more advanced needs, **external archiving of Salesforce data** to cloud platforms like AWS, Azure, or GCP offers greater control and scalability.

Benefits:

- Lower long-term storage costs.
- Advanced querying and analytics.
- Offloads data from Salesforce to improve org performance.
- Enhanced support for industry compliance standards (HIPAA, GDPR, etc.).

External solutions also allow for custom archiving policies, scheduled automation, and better access controls, all critical for large enterprises and regulated industries.

Key Considerations When Choosing an Archiving Strategy

Factor	Salesforce Big Objects	External Archiving Salesforce
Cost	May still incur Salesforce storage costs	Typically lower storage costs with cloud providers
Performance	Basic performance improvement	Significant performance boost for large orgs
Accessibility	Limited querying options	Flexible access, dashboards, and reporting
Compliance	Basic retention support	Meets advanced compliance and audit requirements

Choosing the right **Salesforce archiving strategy** depends on your data volume, compliance needs, and performance goals. Native archiving may work for small to mid-sized orgs, while external options are better suited for complex, high-volume environments.

| Choosing the Right Backup Strategy

Not all Salesforce backups are created equal. The right Salesforce backup tools should fit your data volume, business continuity needs, and compliance standards.

Key Decisions to Make:

Backup Frequency

Should you back up daily, in real-time, or incrementally? High-change orgs may need near real-time protection.

Full vs Selective Backups

Full backups capture everything. Selective backups let you protect only the most critical data.

Data vs Metadata Backup

Most solutions focus only on records. But metadata backup, layouts, workflows, and Apex code are equally vital for full restoration.

Restore Capabilities

Can you perform point-in-time recovery or restore entire parent-child records without breaking relationships?

A solid Salesforce recovery plan combines frequency, scope, and restore granularity. Ready to restore Salesforce data from any scenario?

| Compliance, Security & Retention Policies

Regulated industries can't afford gaps in data protection. Backup and archiving solutions must support Salesforce data compliance standards.

How Backup & Archiving Ensure Compliance:

Regulation Support

From GDPR data archiving, Salesforce needs to meet HIPAA and SOX. The right system helps you meet audit-ready retention and access control standards.

Security Features

Ensure secure Salesforce backup with encryption (in transit and at rest), access controls, and role-based permissions.

Retention & Legal Hold

Define how long data stays archived or backed up. Legal hold ensures data stays untouched during disputes or audits.

Learn how to Master Compliance with the Salesforce Data Retention Blueprint

[Read the Blog](#)

| Introducing DataArchiva

If you're managing growing data volumes, tightening compliance requirements, or hitting storage limits in Salesforce, you need more than native tools. You need a strategic solution that combines automation, scalability, and security.

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That's where DataArchiva comes in.

Whether you're struggling with expensive data storage, limited backup options, or rigid compliance needs, DataArchiva is your go-to Salesforce data archiving solution and Salesforce backup solution in one.

Archiving Built for Scale – Native or External

Choose what works for your business:

- **Native Archiving** using Salesforce Big Objects to retain historical records within the platform.
- **External Archiving** Salesforce data directly to AWS, Azure, GCP, or on-prem, cutting down storage costs while improving performance.

Retain your data. Free up Salesforce storage. Stay compliant.

Automated Backup & Restore with Zero Downtime

Manual exports won't protect your business. With DataArchiva, you can:

- Automatically **backup Salesforce data** (including metadata).
- Instantly restore deleted Salesforce records.
- Perform point-in-time recovery even for parent-child relationships.

A reliable Salesforce recovery plan starts here.

Seamless Integration with Your Cloud Stack

Whether you're using AWS, Azure, GCP, or on-prem environments, DataArchiva integrates effortlessly to support a hybrid or fully external archiving and backup strategy.

Real Results, Real Customers

From healthcare and financial services to public sector and education, organizations worldwide are using DataArchiva to:

- Reduce Salesforce storage costs by 70%.
- Pass audits with zero compliance gaps.
- Allows cost-efficient, scalable data growth management.
- Maintains data accessibility for audits and business continuity.
- Enables long-term retention of data without performance degradation.

Read How An American Healthcare Archived 80 GB Of **Salesforce Data With DataArchiva On AWS Cloud**

[Download the Case Study](#)

| Why Choose DataArchiva?

Compliance-Ready

Built to meet GDPR, HIPAA, SOX, and other global standards with audit trails and legal hold features.

Highly Scalable

From SMBs to large enterprises, DataArchiva scales with your org's data growth.

Simple, Intuitive UI

No complex coding or manual steps. Everything is configurable and easy to manage.

Engineered for Complex Orgs

Supports multi-org, multi-region, and multi-cloud environments.

Smart Automation

Schedule backups, automate archiving jobs, and manage data without manual intervention.

Unified Solution for Archiving & Backup

DataArchiva offers seamless integration of backup and archiving within your Salesforce ecosystem.

When done right, this is the foundation of strong data governance in Salesforce.

| Common Mistakes to Avoid

Even experienced Salesforce admins can overlook critical gaps.

Over-Relying on Native Tools

Weekly exports and Big Objects aren't enough without automation and recovery options.

Not Testing Restores

Backup is only as good as your ability to restore. Always test!

One-Size-Fits-All Archiving

Different data types need different retention strategies.

Ignoring Metadata & Relationships

Many backups miss relationships and configurations, leading to broken restores.

Avoiding these pitfalls sets the stage for a resilient data ecosystem.

| Conclusion

Effective Salesforce data management isn't just about storage, it's about resilience, compliance, and performance.

- Archive for cost savings and compliance.
- Backup for disaster recovery and operational continuity.
- Use native or external tools based on org complexity.

Looking to start Salesforce data archiving or implement Salesforce backup the right way?

Try a Salesforce data solutions demo from DataArchiva. [Get a free consultation or trial today.](#)

| FAQs



Why is Salesforce data management so important?

It ensures clean, secure, and organized data for better reporting, compliance, and customer engagement. Proper data management also boosts system performance and helps businesses make informed decisions.

^ **Why is data backup important for effective Salesforce data management?**

Backup protects against data loss from accidental deletion, system failure, or cyberattacks. It ensures quick recovery, supports compliance, and maintains business continuity during unexpected events.

^ **How does Salesforce data management help with rising storage costs?**

By archiving old or unused data, it reduces reliance on expensive Salesforce storage. Efficient data handling avoids storage bloat, cutting costs and improving system speed.

^ **Can I access archived data in Salesforce using DataArchiva?**

Yes. Archived data remains accessible within Salesforce through a custom UI, allowing users to view, search, and report on data without disruption.

^ **Does DataArchiva support complete or partial data backup?**

Yes. DataArchiva offers full and selective backup options, enabling organizations to back up all data or only specific objects and fields based on their needs.

^ **Are any additional connectors required to install and configure DataArchiva?**

No. DataArchiva is a native Salesforce app and doesn't require third-party connectors. It integrates directly with cloud or on-prem storage platforms.