

GUIDE

From Strategy to Execution: A Guide to Salesforce Data Archiving

TABLE OF CONTENTS

Introduction

Why Data Archiving is Critical for Salesforce

Salesforce Data Archiving Options

Introducing DataArchiva

How DataArchiva Works

Real-Life Use Cases

Comparison: DataArchiva vs Other Archiving Options

Conclusion

FAQs

Salesforce has evolved into a mission-critical platform for enterprises to manage customer relationships, business operations, and service delivery. As organizations grow, so does their Salesforce data—millions of records piling up across objects like Cases, Opportunities, Contacts, and Custom Objects.

While this surge in data reflects business growth, it also introduces new challenges: increasing storage costs, slowed system performance, compliance concerns, and reduced operational efficiency. This is where Salesforce data archiving becomes not just a strategy but a necessity.

This comprehensive guide walks you through everything you need to know about Salesforce data archiving—its importance, real-world use cases, and how DataArchiva has emerged as the preferred solution for enterprises seeking performance, cost-efficiency, and compliance.

| Why Data Archiving is Critical for Salesforce

Salesforce offers limited data storage—10GB for the org and additional per-user storage. For fast-scaling businesses, this limit is quickly breached. Buying additional Salesforce storage is not only expensive but also doesn't solve issues related to performance degradation, data clutter, or audit preparedness.

- » Cost Management: Avoid paying for expensive additional storage
- » Performance Optimization: Reduce CRM data load to enhance performance.
- » Compliance & Audits: Ensure secure, long-term data retention (GDPR, HIPAA, DORA).
- » Data Lifecycle Management: Control and automate how data is stored, archived, or purged.
- » Maintain Data Accessibility: Archive without losing visibility or reporting capabilities.

Failing to implement a robust archiving strategy can lead to slower systems, inefficient operations, and costly compliance risks, especially for regulated industries like healthcare, finance, and public sector organizations.

But First, What is Salesforce Data Archiving?

Salesforce data archiving refers to the process of moving old or infrequently used records, while keeping them accessible, out of your active Salesforce storage. These can include:

- Closed cases or resolved support tickets
- Old opportunities or quotes
- Legacy contacts or accounts
- Historical logs, emails, or activities

It is not the same as backup. Backups are copies for disaster recovery; archives are part of long-term data management and optimization.

A good **Salesforce data archiving strategy** doesn't just move data—it automates, secures, and makes it seamlessly accessible for reporting or audits when needed.

Salesforce Data Archiving Options: On-Premise vs External vs Native Archiving

Once the decision to archive Salesforce data is made, the next step is choosing the right storage approach. The three main options are **on-premise archiving**, external archiving, and native archiving. Each comes with its own benefits and challenges, depending on factors like data volume, security, compliance, and cost.

On-Premise Data Archiving

On-premise archiving stores archived data within your organization's internal servers or data centers, offering maximum control over infrastructure.

Benefits:

- **Greater Security Control:** Full authority over physical and digital security.
- **Low Latency:** Faster local access, ideal for large datasets.
- **Cost-Effective for Smaller Volumes:** Avoids ongoing cloud costs for smaller archives.

Challenges:

- **High Maintenance Costs:** Infrastructure, IT staff, and hardware upgrades increase expenses.
- **Limited Scalability:** Expansion requires new hardware and setup.
- **Physical Risks:** Vulnerable to theft, fire, or natural disasters.

External Data Archiving

External archiving stores Salesforce data in third-party cloud platforms or dedicated archiving services like AWS, Azure, Heroku, and GCP.

Benefits:

- **Scalable:** Easily adapts to growing data needs without hardware investments.
- **Flexible Pricing:** Pay-as-you-go models help control costs.
- **Robust Security:** Enterprise-grade encryption, access controls, and compliance.
- **Disaster Recovery:** Cloud redundancy protects against data loss events.

Challenges:

- **Data Transfer Costs:** Uploading large datasets may incur extra fees.
- **Vendor Lock-in:** Switching providers can be complex.
- **Latency & Network Dependence:** Cloud access depends on internet reliability.

Reduce Cost, Stay Compliant & Unlock Superior Data Experience in Salesforce with **DataArchiva External Archiving**

[Download the Datasheet](#)

Solution Highlight:

DataArchiva offers powerful external archiving by integrating with platforms like AWS, Azure, Heroku, and SharePoint. It helps reduce Salesforce storage costs while enhancing performance, compliance, and data security.

Native Archiving

Native archiving refers to storing archived data within the Salesforce Big Objects to optimize data storage, enhance performance, & maintain compliance.

Benefits:

- Seamless Integration: Directly managed within the Salesforce ecosystem.
- Simplified Compliance: Retains Salesforce's built-in security and audit features.
- No External Dependencies: No need for third-party integrations.

Challenges:

- Limited Storage Capacity: Consumes Salesforce storage, which can be expensive.
- Lack of Advanced Customization: Limited flexibility compared to external platforms.
- Not Ideal for Large Archives: Can quickly reach storage limits.

Natively Archive Salesforce Data Within the App Without **Hitting Storage Limits**

[Get the Datasheet](#)

Introducing DataArchiva: The Preferred Salesforce Data Archiving Solution

Enterprises across industries trust DataArchiva as their go-to Salesforce data archiving solution. It's the only solution that offers both native and external archiving capabilities, allowing businesses to retain control over how and where their data is stored, without compromising accessibility or compliance.

Why DataArchiva Stands Out:

- » 100% Native Option: Archive inside Salesforce using Big Objects
- » External Archiving: Store archived data in external platforms like AWS, Azure, GCP, or on-premises.
- » Custom Archival Policies: Tailor retention schedules to your business needs.
- » Metadata & File Archiving: Go beyond records to archive attachments and files.
- » Enterprise-Grade Security: End-to-end encryption, role-based access, and audit trails.

Data Security using Encryption, Masking, & RBAC with DataArchiva

[Download the Datasheet](#)

- » Regulatory Compliance: Supports GDPR, HIPAA, FedRAMP, DORA, and more.
- » User-Friendly: Seamless integration, easy setup, no code required.

Implementation & Getting Started

Getting started with DataArchiva is fast, easy, and fully supported by experts. The platform is designed to be scalable and customizable for any enterprise use case.

Steps to Deploy DataArchiva:

- » Choose Deployment Model: Native (Big Objects) or External (Cloud/On-Prem).
- » Define Archiving Policies: Select objects, fields, and filters.
- » Schedule & Automate: Use cron jobs or manual scheduling to control archive frequency.
- » Retain Access: Archived data remains reportable via the standard Salesforce UI.
- » Monitor & Audit: Full logs, tracking, and data verification built in.

The DataArchiva team provides onboarding, setup, testing, and long-term support to ensure successful implementation. [Contact our team](#) for more information.

Core Features of DataArchiva

Let's break down the key features that make DataArchiva a powerhouse for Salesforce data archiving:

Native Archiving Using Big Objects

- Archive data within Salesforce.
- Retain platform-level accessibility and compliance.
- No external data movement required.

External Archiving to Any Storage Platform

- Archive data on MySQL, MSSQL, and Postgres by using AWS, Heroku, and Google Cloud Platform or On-Prem systems.
- Compatible with enterprise cloud environments (AWS, Azure, GCP).

Read more: [Top 7 Salesforce Data Archiving Best Practices You Should Know](#)

Metadata & File Archiving

- Archive not just data, but also attachments and files.
- Includes structured and unstructured content.

Custom Archival Policies

- Object-based filtering (standard and custom).
- Retention timelines and purge rules.
- No-code configuration.

Automation & Scheduling

- Set it and forget its archiving cycles.
- Minimal manual intervention required.

Robust Security Framework

- Encryption at rest and in transit.
- Data masking and role-based access control.
- Tamper-proof audit trails.

An American Manufacturer Trusted DataArchiva for
Salesforce **Data Archiving with 100% Security**

[Download the Case Study!](#)

Compliance Assurance

- In-built support for audit readiness.
- Long-term archival for industry compliance.
- Full traceability of records.

| **How DataArchiva Works: Native vs External Archiving**

DataArchiva offers two deployment models to match diverse business needs:

Native Archiving (Big Objects):

- Stores archived data within Salesforce.
- Ideal for highly regulated environments that need platform-only storage.
- Maintains visibility and reporting using standard Salesforce tools.
- No additional infrastructure required

External Archiving:

- Moves archived data outside Salesforce.
- Supports external storage like AWS, Heroku, Azure, and GCP.
- Ensures unlimited, cost-effective storage.
- Best for large-scale archiving needs.

Feature	Native Archiving	External Archiving
Storage Location	Salesforce (Big Objects)	External Cloud/On-Prem
Cost Saving	Moderate	High
Setup Complexity	Low	Moderate
Data Visibility	Native UI	Custom Integration
Best for	Compliance, Simplicity	Scalability, Cost Savings

Both models support metadata archiving, scheduled automation, and compliance-grade security.

| Real-Life Use Cases Across Industries

Government

- » **Challenge:** Years of sensitive case records clogged their Salesforce org.
- » **Solution:** Used DataArchiva’s native archiving to move inactive records to Big Objects, maintaining accessibility for audits.
- » **Result:** 70% storage cost reduction + audit compliance met.

Healthcare

- » **Challenge:** HIPAA compliance requires secure, long-term data retention.
- » **Solution:** Archived old patient interaction logs and attachments to a secure AWS S3 environment.
- » **Result:** Achieved compliance with zero disruptions to patient services.

Financial Services

- » **Challenge:** Heavy reporting on legacy transactions degraded performance.
- » **Solution:** Automated archival of closed financial transactions to external storage.
- » **Result:** Improved report execution speed by 50%.

Manufacturing

- » **Challenge:** Overloaded Salesforce due to decades of service logs and cases.
- » **Solution:** Archived historical FSL files and work orders to SharePoint.
- » **Result:** Streamlined operations, improved field service agent productivity.

| Comparison: DataArchiva vs Other Archiving Options

Solution	Pros	Cons
Technology Used	Native + External options, compliance-ready, easy UI, automation	Requires upfront setup planning
Functionality	Basic archiving with limited automation	No automation, error-prone, no reporting
Cost Impact	Native, flexible	Complex setup, no support
Customization	Scalable	High cost, limited Salesforce-specific features

Only DataArchiva delivers an all-in-one archiving experience with the control of native, the scalability of external, and the security of enterprise-grade compliance.

Unlock Superior Data Experience in Salesforce with **DataArchiva—Optimize, Organize, and Excel!**

[Request a Personalized Demo Today!](#)

| FAQs

^ Is DataArchiva compatible with both Classic and Lightning?

Yes, DataArchiva works seamlessly in both Salesforce Classic and Lightning environments.

^ Can we restore archived records back into Salesforce?

Absolutely. Archived records can be restored with full integrity and relationship mapping.

^ Does archived data remain visible in reports?

Yes. With native archiving, you can report using Big Objects. External data can be integrated with visualization tools or on-demand retrieval.

^ Can DataArchiva archive files and attachments?

Yes. Both metadata and unstructured data (files, attachments) can be archived.

^ Is DataArchiva secure for storing sensitive data?

Yes. It supports encryption, role-based access, masking, and compliance with industry regulations like HIPAA, GDPR, and DORA.