



CHECKLIST

# BACKUP FOR **SALESFORCE** EVALUATION CRITERIA CHECKLIST



# TABLE OF CONTENTS

<a href="#"><u>Welcome</u></a>	<b>3</b>
<a href="#"><u>Evaluation Criteria for Salesforce Backup and Restore</u></a>	<b>3</b>
How to Use This Guide	3
Key Considerations	3
Restore	4
Backup	5
Security	6
Usability	8
Administrative	9
Export	9
	<b>10</b>
<a href="#"><u>Helpful Resources</u></a>	10
Knowledge Base	10
Email Support	10
Privacy	10
Security	10
	<b>10</b>
<a href="#"><u>About Spanning</u></a>	

# WELCOME

You're one step away from achieving comprehensive protection of your Salesforce data. This checklist will shed light on why Spanning Backup for Salesforce is the right fit for all your backup needs.

Spanning's cloud-native, purpose-built solution for Salesforce ensures customer data is well-protected and always available for rapid restore, thereby keeping your business operational and employees productive. Moreover, Spanning empowers end users as well as administrators to quickly find and restore data to its original state in just a few clicks.

By the time you're done with this checklist, you will have 100% confidence and proof that Spanning is the right partner for backing up and restoring your data.

**“The functionality and ease of use of the product played a huge factor in moving forward with Spanning.”**

- Andy Pederson, IT Manager, ECMHS.

[Sign up](#) for a free trial today to experience the complete Spanning feature set and see exactly what Spanning can do for your business.

## EVALUATION CRITERIA FOR SALESFORCE BACKUP AND RESTORE

Protecting your organization's Salesforce data from accidental deletion, malicious behavior and synchronization errors is vital to ensuring your team remains productive. Even more important is your ability to restore lost data and to trust in the solution and provider to deliver results during the “moments of truth” — when you need them the most.

**“Yes, we recommend that you use a partner backup solution that can be found on the AppExchange.”**

-Salesforce

## HOW TO USE THIS GUIDE

You'll find numerous tables throughout this document listing various evaluation criteria. We've provided a blank column in all tables to make it easy for you to use as a checklist during evaluations. We've also used checkmarks to note whether Spanning meets the criteria. We hope you'll modify these checklists as needed to reflect your own requirements.

# KEY CONSIDERATIONS

When evaluating solutions for data protection, look for those with:

- **A focus on restore perfection:** Look for a solution that offers granular, point-in-time restore capabilities and an option for end-user self-service restore capabilities.
- **A proven ability to scale:** Scalability doesn't just apply to the technology but also service and support.
- **Experience meeting enterprise needs:** Ask for enterprise reference customers and stories.
- **A history of trust and transparency.**

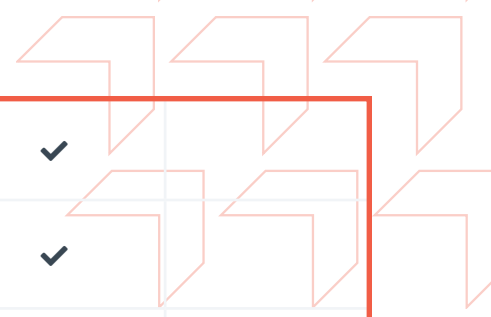
## RESTORE

The most important capability of any data protection service is its ability to restore data. When information is lost, your administrators and end users (if enabled) should be able to quickly find and restore data from any point in time. The speed, accuracy and user experience for restoring data are key to keeping your organization moving forward and reducing business continuity risk.

**“Spanning Backup did everything we wanted it to do, was easy to get up and running, and proved itself when we tried some restores and point-in-time backups.”**

-Garry Lengthorn, Director of IT Services, SThree

RESTORE CAPABILITIES	Spanning	Others
Restore individual permanently deleted records	✓	
Restore multiple permanently deleted records	✓	
Restore child records for permanently deleted parent records	✓	
Control if child records should be restored with parent records	✓	
Restore individual updated records	✓	
Restore multiple updated records	✓	
Preview individual records before restore	✓	
Search for individual records for restore	✓	
Restore specific fields of records for all standard object types	✓	
Restore specific fields of records for custom object types	✓	



Restore deleted records for all standard object types	✓	
Restore updated records for all standard object types	✓	
Restore deleted records for custom object types	✓	
Restore deleted records for custom object types	✓	
Restore multiple records of any standard or custom object type in a single restore to recover from data disaster	✓	
Restore multiple records of any standard or custom object type to different production org or sandbox (sandbox seeding) in a single restore	✓	
Restore records for all standard object types that are owned by inactive users by overwriting the Owner ID	✓	
Restore records for all standard object types by overwriting field values for newly added required fields	✓	
Restore records for all custom object types by overwriting field values for newly added required fields	✓	
Anonymize/mask data for specific fields based on your criteria when restoring to a different production org or sandbox (sandbox seeding)	✓	
Sandbox seeding at no extra cost	✓	
On-page restore of individual records by the end user (within their assigned role / permission sets)	✓	
Field level comparison preview: On-page restore of individual records	✓	
Compare specific metadata types between two backups of same org or for two different orgs and view line-by-line comparison diff for metadata components	✓	
Compare all metadata types between two backups of same org or for two different orgs and view line-by-line comparison diff for metadata components	✓	
Restore metadata back into the same org for Approval Processes, Assignment Rules, Classes, Dashboards, Emails, Flow Definitions, Flows, Layouts, Objects, Pages, Permission Sets, Profiles, Reports, Report Types, Roles, Triggers and Workflows	✓	



# BACKUP

The foundational requirement of every data protection service is backup. Your data should be accurately, securely and fully backed up, ensuring it is available for rapid restoration. Clear visibility into the status, details and errors of each backup are key to establishing trust in the service.

**“With Spanning, I don’t have to worry about data loss. I like to say, I’ve got 99 problems but backup isn’t one of them.”**

– Stephanie Herrera, Director of Salesforce and Business Systems, Spredfast.

EXPORT CAPBALITIES	Spanning	Others
Automated daily backups	✓	
Scheduling for automated daily backups	✓	
Unlimited on-demand backup	✓	
Back up standard and custom objects	✓	
Back up metadata and customizations	✓	
Back up attachments	✓	
Back up parent-child relationships	✓	
View and monitor the status of all backups	✓	
View the granular results of every backup with count for new, updated, deleted and undeleted records	✓	
Review error details and actionable guidance for errors	✓	
SLA on backup frequency and completeness	✓	
99.999999999% data durability	✓	
Unlimited versions for all data	✓	



# SECURITY AND THE GENERAL DATA PROTECTION REGULATION (GDPR)

Compliance with the EU General Data Protection Regulation is a must, as is maintaining the security and integrity of your data. The right solution will be independently certified and use industry-leading security technologies and practices.

**“Just because you’re storing data in the cloud doesn’t mean that data is not your responsibility.”**

- Reed Kennedy, Chief of Projects for Pivotal IT.

SECURITY AND GDPR CAPABILITIES	Spanning	Others
Fully GDPR-compliant	✓	
Process for GDPR Article 17 right to erasure (right to be forgotten) requests	✓	
Controls in place to guard against rogue right-to-be-forgotten requests	✓	
SOC 2 Type II Compliance certified	✓	
US-EU Privacy Shield certified	✓	
HIPAA-compliant	✓	
Regional deployment options	✓	
Customer-managed encryption keys at no additional cost	✓	
US-Swiss Privacy Shield certified	✓	
Skyhigh CloudTrust rating for Enterprise Ready	✓	
All data in encrypted in transit with at least 128-bit SSL	✓	
All data at rest is encrypted with 256-bit AES encryption	✓	
Intrusion detection	✓	
Detailed immutable audit log for all setting changes	✓	
Downloadable audit log for all settings changes	✓	
Complete activity log including exports, restores and backups	✓	
Downloadable activity log including exports, restores and backups	✓	
Regional deployment options (United States, Ireland, Canada, APAC and UK)	✓	

# USABILITY

The key to improving user satisfaction and decreasing the time to restore is usability. The right solution is intuitive, familiar and provides easy ways for administrators to locate lost data.

**“I found Spanning Backup for Salesforce to be the best backup and restore solution for our clients – and we found it so useful, we adopted Spanning for HandsOn Connect. Spanning has been a true partner in helping our clients protect all their data, and I recommend them highly.”**

- Art Ordoqui, Chief Customer Success & Partnerships Officer, HandsOn Connect Cloud Solutions.

RESTORE CAPABILITIES	Spanning	Others
Requires no training	✓	
End-user restore of field-level changes	✓	
Integrated Chatter notifications	✓	
In-app access to backup, restore and export	✓	
Field-level, side-by-side comparison for on-page restores	✓	
Detailed error descriptions for restores, with actionable guidance	✓	
Search individual records for any object type to restore or export	✓	
Restore children records of deleted parent records	✓	
Quickly review the status of backups and review any associated errors	✓	
Quickly review the historical trend of changed records for any object type	✓	
Option to work within Salesforce Classic (Aloha) or Lightning Experience	✓	

## ADMINISTRATIVE

Enterprises need controls that integrate into their existing IT processes that are powerful yet easy to use, and which integrate into the way that they work. Having the ability to customize workflow and settings to align with your organization’s needs is non-negotiable in a backup and restore product.

**“The most important thing Spanning Backup has allowed us to do is focus on our business. When something just works – the way Spanning Backup does – that’s quite refreshing.”**

- Garry Lengthorn, Director of IT Services, SThree.



ADMINISTRATIVE CAPABILITIES	SPANNING	OTHERS
Control over whether non-admin users can restore field-level errors for individual records	✓	
Configure the frequency of automated email notifications	✓	
Configure email address where reports will be delivered	✓	
Configure Chatter feed to post backup, export and restore events	✓	
Control the number of API calls the provider can use per day	✓	

## EXPORT

To provide you with full control over your data, the right solution will enable you to export and download data for archiving or retention. The export process should be flexible and support multiple export use cases, including point-in-time exports of objects, metadata and attachments.

**“Because we have Spanning Backup, I don’t worry about losing data. I know I’ll be able to fix it as quickly as the damage was done.”**

- Stephanie Herrera, Director, Salesforce and Business Systems, Spredfast.



EXPORT CAPABILITIES	SPANNING	OTHERS
Export all records of an object type	✓	
Export specific records of an object type	✓	
Export multiple metadata types from any point-in-time backup	✓	
Export all files of a metadata type	✓	
Export multiple object types from any point-in-time backup	✓	
Export attachments	✓	
Export entire backup of all Salesforce data from any point-in-time backup	✓	



# HELPFUL RESOURCES

## Knowledge Base

Easily search through a number of articles in our [Knowledge Base](#) to find information on the most common user questions.

## Email Support

If you can't find the answer to your question or need further assistance, please don't hesitate to contact us via email at [support@spanning.com](mailto:support@spanning.com).

## Privacy

Spanning takes privacy seriously. Read our [Privacy Statement](#).

## Security

Spanning Backup employs multiple layers of operation and physical security to ensure the integrity and safety of your data. Read how we [protect your data](#).



Spanning Cloud Apps, a Kaseya company, is the leading provider of backup and recovery for SaaS applications, helping organizations around the globe protect their information in the cloud. The company provides powerful, enterprise-class data protection for Microsoft 365, Google Workspace and Salesforce. With data centers located in North America, the UK, the EU and Australia, Spanning Backup is the most trusted cloud-to-cloud backup solution for thousands of companies and millions of users around the world.