Data Management Best Practices

Data loss happens all the time, even in the cloud. Much of this is the result of user error such as the accidental deletion of data or data overwrites. While data is retained in the Salesforce recycle bin for 15 days, it could be well over 15 days before a user or an administrator realizes something has been accidently deleted. If you lose data that you need recovered and do not have backups, Salesforce offers a last resort 'Data Recovery' service for a flat rate of $10,000.

As we work together, ECHO will advise you on steps to avoid data loss. The three methods explained in this document are your responsibility to implement and maintain. In total, implementing these three recommendations should take less than one hour of your time and could end up saving many hours down the line.[1]

In addition to backing up your data, it's important to back up your metadata, especially when you are making large changes to your system. Ask our team to implement metadata backups if you'd like. It takes under 2 hours to implement and is another best practice that will save hours down the road.

Recommended Tools to Implement

A. Data Backup/Export
B. Field History Tracking
C. Chatter Feed History Tracking

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[1] As ECHO and your organization work together, if data needs to be restored, depending on the circumstances, we may or may not invoice your organization for our time. If data exports are not available because the instructions in this document have not been followed, many more hours from us will be required and we will charge the time.
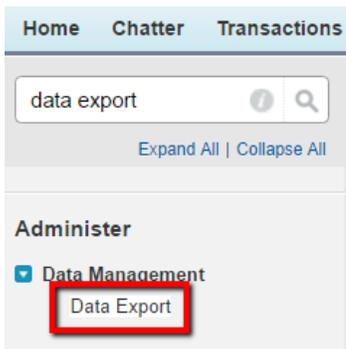
A. Data Backup/Export

For data backups or exports, we recommend the native Salesforce tool, **Data Export Service.**

To setup weekly data exports, your System Administrator will follow these steps:
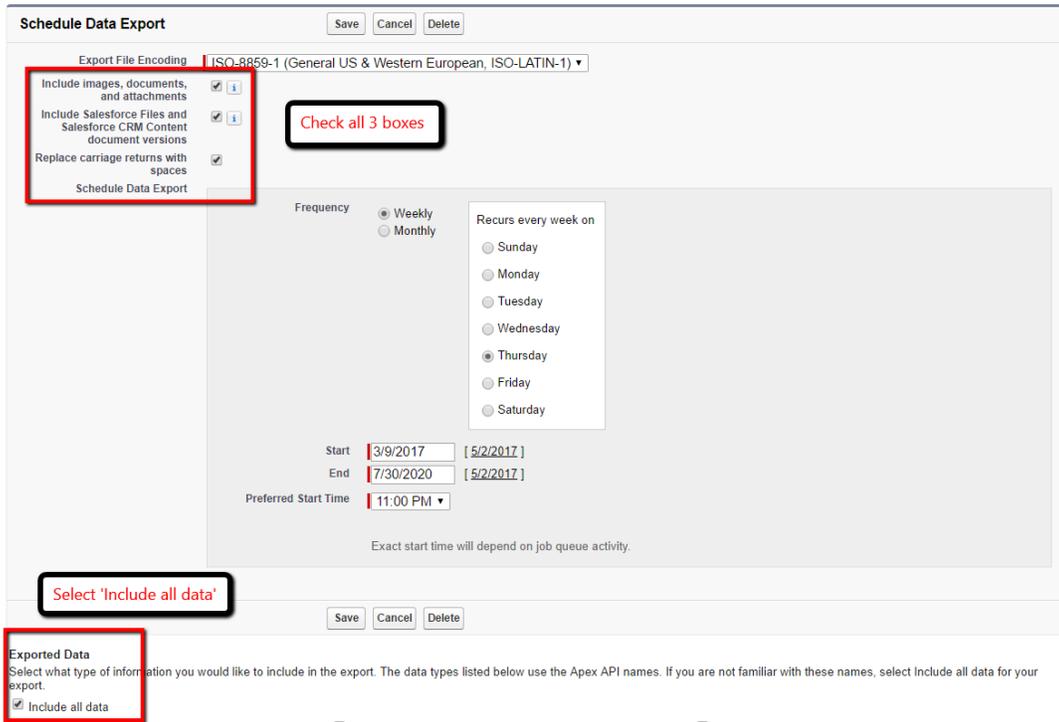
1. Click Setup in the upper right corner.

2. Type 'Data Export' in the Quick Find/ Search bar, then click Data Export.

3. Choose Schedule Export and the next page will give you export options:

Schedule Data Export

- Check all 3 boxes at the top to include images, attachments, files, etc.
- For Frequency, choose Weekly.
- Pick a day and time to run the export. You will be notified by email the backup is ready and have 48 hours to download, so pick a day that you will normally access your email and login to Salesforce within 2 days.
- Select Include all data.

4. When it is time for export, Salesforce creates a zip archive of CSV files (opens in MS Excel) and emails the System Administrator who scheduled the export when it's ready. Large exports are broken up into multiple files.

5. To download the zip file, follow the link in the email, or login to Salesforce and follow the steps above to return to Data Export and click **Data Export**. After you download the .zip file save it to a secure location.

Notes:
- The downloaded zip file will have a CSV file for every object in your organization. Each file lists every record on that object with every field.
- Zip files are deleted 48 hours after the email is sent. If you did not download before that time, you will need to wait until the following week to download the next export.
- When you create new custom objects in Salesforce, they do not automatically get added to your data export. If you create any custom objects, return to Step 3, choose Schedule Export, and reselect 'Include all data' then save. We recommend you setup a calendar reminder to check the backup settings every 3-4 months to confirm all objects are selected or add additional objects.
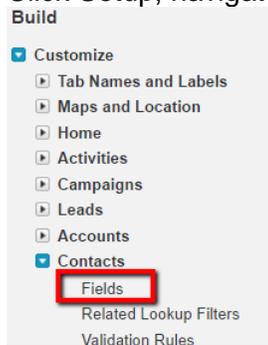
B. Field History Tracking

Another native tool allows us to track individual field changes on an object. Without field history tracking we know when a record was edited and by whom, but we do not know what changed or the previous value. Field history tracking gives us those details. For example, with Field History turned on and tracking Name, when someone changes John Smith to Johnathon Smith-Jones, we will have a record of the previous values and who made the change on what date.

- You can track the field history of custom objects and most standard objects, including Accounts, Contacts, Opportunities, Leads, and Cases.
- Modifying these fields adds an entry to the History related list. All entries include the date, time, nature of the change, and who made the change.
- The field history changes are displayed in the History related list of an object. The field history data is retained for up to 18 months.

To enable Field History Tracking:

1. Click Setup, navigate to the object that you want Field History Tracking, and click Fields.

1. Click Set History Tracking. Notice on right side of screen shot that fields with Track History selected are listed next to field.
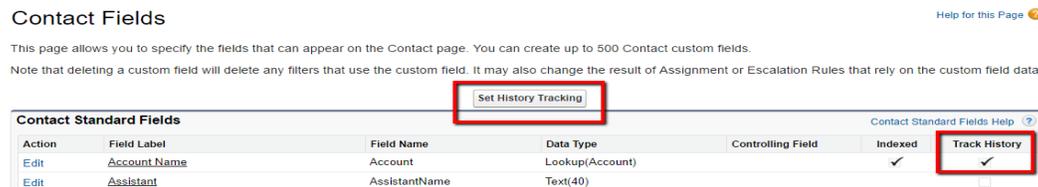
2. Click Enable (Object Name) History and select which fields to track, click Save when done.

Contact Field History

Help for this Page

☑ Enable Contact History

This page allows you to select the fields you want to track on the Contact History related list. Whenever a user modifies any of the fields selected below, the old and new field values are added to the History related list as well as the date, time, nature of the change, and user making the change. Note that multi-select picklist and large text field values are tracked as edited; their old and new field values are not recorded.

Save   Cancel

Deselect all fields

Track old and new values

Account Name	☑	Account Relationship	☐
Active Services	☐	Agency Re-entry 1	☐
Agency Start Date	☑	Agency Termination 1	☐
Agency Termination	☑	Agency Tour	☐

3. Now that Field History is set up, we need to add the Related List to the page layout. Here we will add it to the Contact layout.

- Click Edit Layout on the record.

- Go to the section on Related Lists and drag Contact History on the page layout, and click Save.

- Now when you make changes to the fields you selected, you will see them on the Related List. Here we can see the Date of the change, the User who made the change, and the Action, which shows the previous value, is any, and the new value in bold.

C. Chatter Feed History Tracking

Chatter feed history tracking is similar to field history tracking, except it posts changes to the record's Chatter feed. Users will be able to see changes made to records they follow in their own Chatter feed.

- You can track up to 20 fields for each object.

To enable Chatter Feed History Tracking:

1. Click Setup in the upper right corner.

2. Type 'Feed Tracking' in the Quick Find/ Search bar, then click Feed Tracking.
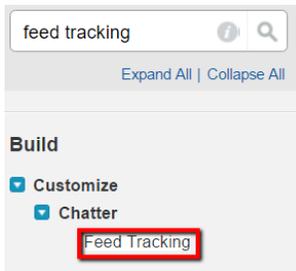
3. Choose which object you want to enable Chatter feed tracking for on the left panel.

4. Select 'Enable Feed Tracking' checkbox for each object you want to track fields for. Salesforce has already enabled this feature for some standard objects, such as Accounts and Contacts.

5. Select the fields you want to track, and click Save. You can select up to 20 fields.
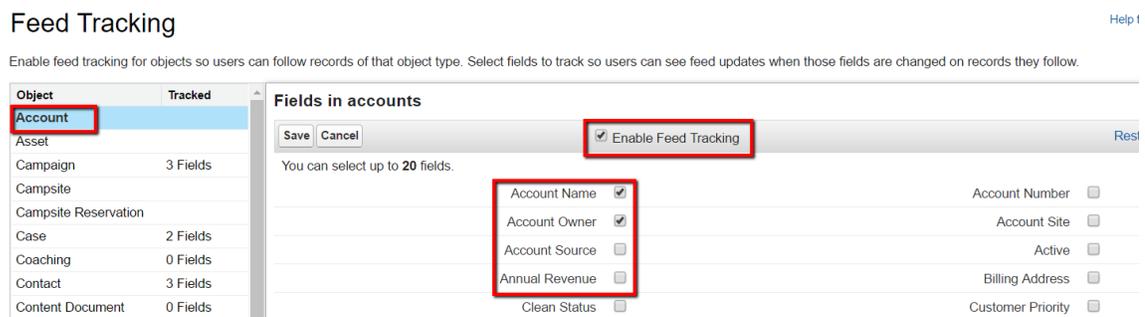
6. Now when you edit any of the fields you selected, the changes are posted to the record's Chatter feed. If you are following the record, then you will also see the post on your own Chatter feed.