



## Metadata Management

What is metadata?

Metadata is data that describes other data. In Salesforce, metadata captures information about how the instance is set up, how it looks, and how it behaves. Rather than data about constituents, metadata stores information about the configuration of the system: its code, objects, fields, page layouts, reports, validation rules, workflows, etc. Metadata can tell you **who** changed **what** in the system structure, and **when**.

Why is it important to preserve metadata?

Backing up your metadata regularly is recommended as a safety measure to prevent data loss in the case of accidental overwrite or deletion, as well as to provide a record of the changes made to the system for future reference. By tracking all configuration adjustments and storing this metadata, there is the ability to trace back through changes when troubleshooting and to revert to a previous version of the configuration. This is not something that Salesforce offers natively – a sandbox will contain a copy of metadata and will quickly become outdated between refreshes.

What are my options for backing up metadata?

There are a few paths you could take towards storing your metadata. The right solution for your organization will differ depending on the complexity of your instance, the amount of anticipated customization, your budget, and the level of involvement you can commit to the process.

<i>Solution</i>	<i>Approach</i>	<i>Pros</i>	<i>Cons</i>
Do nothing	If you have a small org with a low number of users and not many expected changes, the risk of data loss is minimal. In this case, there is less of a need for regular metadata backups.	Zero cost	No backup in place
ECHO Backup	ECHO can set up a backup of your metadata using ANT and Git, create a repository to store code securely on Bitbucket. This offers the option to merge sandbox metadata into production metadata and vice versa. We have finetuned control and oversight over commits and changes, plus the ability to resolve conflicts in a controlled environment.	Can do on existing contract, no action needed by client	2-3 hours effort, light ongoing maintenance
Blue Canvas	<a href="#">Blue Canvas</a> is a software service that automatically takes snapshots of your Salesforce metadata and commits it into a standard Git repository. Continuous snapshots ensure that work is never lost or deleted unintentionally and that you can always roll back to previous states of your application.	Always current, user-friendly	Need a contract with vendor or through ECHO (15% overhead charge)

Have any questions?

Please feel free to **reach out to ECHO** with any questions you may have about metadata or to request a recommendation on the best approach for your organization.