

WHITE PAPER
on Data Archival with Salesforce.

Reduce your storage cost in Salesforce by way of data archiving.

Need for Data Archive in Salesforce

Who should read this paper

Your Salesforce Administrators (includes IT Admins, IT Managers and Salesforce Administrator)

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Introduction

It is known fact that storage cost is expensive in Salesforce and it will be difficult to put a control on data growth with growing business. This documents outlines the need for data archiving in Salesforce to reduce the storage cost and challenges associated with it.

Out of various possible solutions, this document addresses how the DataArchiva application can be a better fit considering cost, performance, security and maintenance, that can potentially reduce your Salesforce storage cost upto 80%.

Why to Archive Data?

Primarily to save storage cost in Salesforce. If you wonder, is that a big deal?, yes it is, because if planned at early stage, thousands of dollars can be saved by having an archive solution. Based on our case study, organizations can save upto 80% of storage cost every year.

Business Challenge

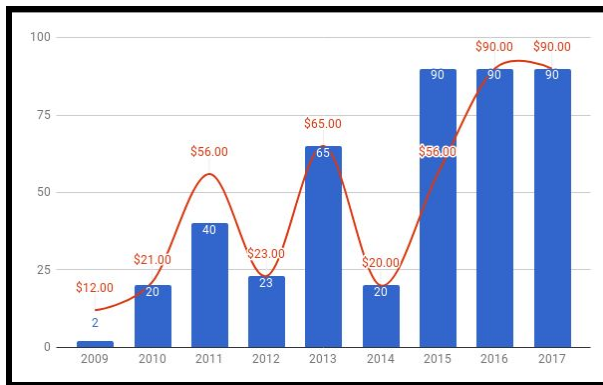
Storage cost

When a business grows over time, the data size grows as well. Old data becomes historical and remains in database. In Salesforce, storage space is very expensive and this results in increase of storage cost with time and apparently this cost only keeps increasing as data increases. Depending on nature of your business, objects such as Tasks, Events, Emails, Opportunities, Cases, Leads, Campaigns, Custom audits or custom objects, etc keep growing and adds to the overall storage size.

Now the question -*Do you really need the old or historical data in database?* the potential business answer could be both yes and no, that's because occasionally, one may need to refer to old data for audit purpose or any other verification.

Let's take a case, if your organization consumes Salesforce data storage space of 100 GB, your storage cost could be anywhere around \$300,000 per annum. In reality, 60-70% of you data can potentially fall in to old data or in technical sense it can be called as archivable data.

Here is the case study based on one of our customer's data.



It can be noticed that initial storage cost was less when data was small. Over time, the business growth resulted in huge data growth.

This customer can immediately save \$350,000 per year using archive solution. Besides, if this customer had planned an preemptive archive solution 5 years ago, then they could have potentially saved up to \$1,225,000 from data storage cost.

Field History and Audit

Though these data do not add to storage space, but it has validity period and gets automatically deleted after elapsed time. Hence archiving these data on timely manner will enable to query for future audits. In case of custom audit objects, it is necessary to archive those objects periodically to reduce the storage consumptions.

Deleted records

Deleted records stay in trash for a shorter period and recovering those at later stage could cost an additional fee from Salesforce. Hence for any audit reasons, this can be candidate for archiving.

Status based Archiving

At times, it is not always necessary to archive data that is older than certain time period, but rather it is essential to archive data based on business futility. For example, in a ticketing system once a ticket is closed, entire data records related to this ticket can be archived. This can apply to other business cases like Student admission closure, HR interview closures, business workflows, etc

Technical Challenge

Question here would be, How to archive old data and reduce storage cost? And what kinds of systems needed?

One of the way to archive is move the old data to different storage system and thereby reduce the storage cost. Options can include archiving data to a low cost external cloud storage provider or in-house storage system. In either case, there is good deal of infrastructure and

maintenance overhead involved as shown in below matrix with comparison to DataArchiva application if one has to think from solution point of view.

	DataArchiva (Native)	On-Premise	Public Cloud
Scalability – Data retention & user load	✓	✗	✓
Performance and high availability	✓	✗	?
Alignment with Salesforce roadmap	✓	✗	✗
Security and data transformation	✓	✗	?
Data storage within premise	✗	✓	✗
No external system dependency	✓	✗	✗
Data integrity between salesforce and Archived data	✓	✗	✓

This could bring in new challenge on how to pull data back to your salesforce system on demand and without compromising on impediments related to maintenance, performance, security, data correlation, etc. This also means, how archived data can be pulled seamlessly in Salesforce along with live data without affecting performance or usability.

Security

There can be security constraints if data leaves Salesforce to external storage system. Mutual trust and secure connections has to be established across connected systems to make sure data is secure while in flow or in rest . The credentials need to query or fetch archived data has to stored with encryption. Data security on the archived data has to be taken into consideration to make sure it is not vulnerable for any data breach with appropriate encryption.

Performance

Since data is scattered across Salesforce objects and archived objects, querying any archived data could be performance intensive operations. Design and architecture of archive system should be capable to cater data with better performance such that the end user does not see the performance difference when viewing data from salesforce vs archived data.

Usability

For end user, when using Salesforce, it doesn't matter where the data is originating, hence usability should not get affected just because some of data is coming from archived source. The look and feel of the system must be consistent.

Solution

Considering above mentioned business and technical challenges, **DataArchiva** was designed to meet this unique need. With **DataArchiva**, there is no need for external storage or integration, all archived data still resides within Salesforce ecosystem making your data safe and secure.

Here are list of benefits and features of **DataArchiva** that will help you make wise decision when choosing a data archival solution for your Salesforce org.

Benefits

- Save data storage cost upto 80%.
- Almost Zero or Low Maintenance.
- No External Storage.
- Improved Application Performance.
- Easy Setup and Configurations (takes less than 10 mins).

Features

- Surgical Archiving - No business Interruption.
- Retain data relationship.
- Smart Metadata Reconciliation.
- Compliance Ready (Activity Auditing- WHO did WHAT and WHEN) .
- Salesforce Data Retention (Beyond 18 months).
- Salesforce Data Protection (Same Force.com platform).
- Built-in Intelligent and customised search (supports Async SOQL).
- Admin friendly UI to configure objects
- Salesforce Standard Field History & System Audit Trail Archiving (beyond 6 months).
- Aligned with Force.com and Big Object roadmap
- Scalable Big Object: ability to store billions of records without impact
- Deleted Record Archive (beyond 15 days)
- API for external integration (Apex and Process Builder Support)
- Support AppExchange Custom Apps/Solutions.

Conclusion

As Salesforce storage cost is expensive, it is wiser to plan a data archive solution at earliest. In nutshell, if you notice that your Salesforce data is growing or already in higher side, it is very essential to look for data archiving to prevent excessive accumulated storage cost and as well for better application performance.