



VEEAM PLAYBOOK

Salesforce Data Archiving

A Playbook for Resilience

Powered by Veeam Data Cloud *for Salesforce*

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A short brief on the next phase of the Salesforce data lifecycle.

Backup is solved. Storage growth, governance and compliance are not. This brief frames how Veeam approaches archival as part of a single, repeatable lifecycle for Salesforce data.



Backup solved one part of the Salesforce data lifecycle. Storage growth is the next.

Salesforce holds the data that runs your business. Customer records, opportunities, cases, files, every interaction your teams depend on. And it keeps growing.

That growth isn't slowing down. Industry analysts project worldwide data volumes will reach 182 zettabytes in 2025, and most enterprises now manage at least a petabyte of their own (one petabyte is roughly 500 billion pages of text). Inside Salesforce, the same pressure plays out at the org level. Storage limits get hit. Performance drags. Reports take longer. Costs climb.

Most Salesforce admins know they should archive. Few know where to start.

This playbook walks you through it. You'll see **why archiving matters, how to build a strategy that fits your org, and how Veeam Data Cloud for Salesforce turns that strategy into an automated, compliance-ready system.**

2+ years

VEEAM ARCHIVAL CAPABILITY

Available in both the on-premises product and Veeam Data Cloud.

3

REASONS IT MATTERS

Storage limits, performance and compliance scale with org age.

1

LIFECYCLE, NOT A PROJECT

Protect → archive → access.
A single resilience workflow.

01

Why archiving belongs on every Salesforce roadmap

01.1 | THE RISKS OF LETTING SALESFORCE DATA GROW UNMANAGED

Archiving moves inactive data out of your live Salesforce environment to a secure storage location, where you can still find it, retrieve it, and prove you kept it.

Done well, it's invisible to your users and obvious on your bill.

Of all the phases of data lifecycle management, archiving gets the least attention. Backup feels urgent. Recovery feels urgent. Archived data, by definition, doesn't. Until you hit your storage limit. Until reports start timing out. Until an auditor asks for a record from seven years ago.

The risks of skipping archiving

Spiraling Salesforce costs

Storage in Salesforce is finite, and expanding it isn't cheap. Every extra block of high-cost storage you buy is budget you can't spend on innovation.

Performance drag

As object volumes grow, queries slow, reports stretch, and your teams feel it every day. Bloated production orgs are quiet productivity killers.

Compliance exposure

GDPR, HIPAA, CCPA, CPRA, SEC 17a-4, and a long list of industry rules dictate how long you must keep certain records, and how cleanly you must delete the rest. Keeping everything in production isn't a compliance strategy. It's a liability.

Poor data hygiene

When stale records sit next to fresh ones, teams make decisions on the wrong data. Sales reps chase ghost opportunities. Support agents read closed-out cases as live.

Ask yourself

If any of these risks would make your CFO, CISO, or VP of Sales uncomfortable, archiving belongs on your roadmap. **Keep reading** →

02

**Build your archiving strategy
in six steps**

From inventory to ongoing optimization — a repeatable strategy.

Before you start, line up the answers to these three questions:

WHO are the stakeholders that need a seat at the table? Pull in decision makers from IT, security, compliance, and the business owners of the data.

WHO will need access to archived records, and under what circumstances? Set permissions before you set policies.

WHAT outcome are you solving for? Storage relief, performance, a specific compliance gap, or all three?

02.2 | SIX STEPS BEFORE THE FIRST POLICY RUNS

STEP 01

Inventory your data

You can't archive what you can't see.

Start by mapping what lives in your production org: record age (untouched data is your first archive candidate), growth rate by object (Task, Email Message, Event, and Case usually lead), and future needs so the next 12 to 24 months don't surprise you.

- Age of the data
- Growth rate by object
- Future data needs

STEP 02

Build the business case

Archiving is rarely an admin-only decision. Frame it as a business outcome and match the message to the audience. If your CFO cares about TCO, lead with cost. If your CISO cares about risk, lead with compliance. Lighter orgs run faster (sales and service teams feel it daily), storage you don't buy is budget for growth, and archived data stays available without getting in the way.

- Performance
- Cost
- Risk
- Continuity

STEP 03

Map your regulations to your data

Why archive instead of just deleting? Almost always, the answer is compliance. Different regulations want different things, and some are non-negotiable. Once you know which rules apply (plus any industry-specific rules), map them to your data types. That mapping becomes the spine of your retention policies.

- GDPR and UK GDPR
- DORA for EU financial entities
- NIS2 Directive, for essential entities in the EU
- HIPAA
- CCPA and CPRA
- Electronic Storage of Broker-Dealer Records (SEC 17a-4)

STEP 04

Pick the right tool, then write the policies

Choose a Salesforce archiving solution that meets both core and advanced requirements. Create simple, documented archiving policies that define what data is archived, when it is archived, how long it is retained, and who can access it.

- Automated archival policies configured per Salesforce tenant
- Granular filtering by object, field, and conditions (AND, OR, NOT)
- Record count previews before each archival run
- Archived data retained and restorable from any archive session
- In-Salesforce access and restore via the Veeam Data Cloud Salesforce Extension

STEP 05

Train your users

A policy nobody knows about isn't a policy. Build a short, plain-language guide that covers what archiving is, why your org is doing it, how users can find archived records, who to call for help, and how storage usage is tracked. If your archiving tool has dashboards, point your team at them.

- What archiving is and why your org is doing it
- How to search archived records
- Who to call for help
- How storage usage is tracked

STEP 06

Treat archiving as a living program

Archiving isn't a one-time project. The goal isn't to set it and forget it, but to set it, monitor it, and tune it. Review policies on a regular cadence, watch your storage trends, confirm retrieval still works, and update when regulations change, you adopt new Salesforce features, or the business adds new data types.

- Review policies at least twice a year
- Watch storage trends
- Confirm retrieval still works
- Update when rules or features change

03

How Veeam Data Cloud for Salesforce simplifies archiving

How a policy comes together

Veeam Data Cloud for Salesforce is a SaaS solution that protects Salesforce data, files, and metadata, and archives the records you no longer need in production. Backup and archiving live in the same platform, managed together from one place.

01

Define what to archive

Pick an object (Task, Case, Event, or custom), set conditions like record age or last activity, and choose how often the policy runs.

02

Set retention

Define how long archived records remain in Veeam Data Cloud before they're purged for good, with rules that match your regulations.

03

Schedule and forget

Veeam runs the policy on your schedule, removes records from Salesforce, and stores them in the archive with full fidelity.

What you get

- ✔ **Automated archival policies**
Define what to archive, how often, and how long to keep it. Veeam handles the rest.
- ✔ **Storage inclusive at a predictable price**
Archive what you need without watching the meter.
- ✔ **Encryption you control.**
Three-layer encryption with the option of AWS BYOK keys.
- ✔ **Direct access from Salesforce**
The Veeam Data Cloud Salesforce Extension lets authorized users find and restore archived records right from the Salesforce console, no separate portal trip required.
- ✔ **Granular restore**
Bring back individual records or entire object hierarchies, with parent-child relationships intact.
- ✔ **Built-in compliance reporting**
Audit logs, retention enforcement, and policy visibility ready for your next audit.



Search and restore archived data from inside Salesforce

Most archiving tools force a context switch: users leave Salesforce to find an archived record, then come back. The Veeam Data Cloud Salesforce Extension (available on the Salesforce AppExchange) removes that friction by bringing archived data into Salesforce itself.

The result: fewer help-desk tickets for admins, and archived data that feels as accessible as live data for sales and service teams. With the extension, authorized users can:

- ✓ View archived records and files directly inside the Salesforce UI
- ✓ Browse and preview archived data without restoring it first
- ✓ Restore one record or many at once, with related child objects intact
- ✓ Track and review recent restore operations

04

Outcomes & next steps

How customers put archiving to work

“ When I log in to Veeam Data Cloud for Salesforce, I get instant reassurance that our Salesforce files and metadata are **100% protected with zero failures.**”



James Cook

Investments CRM Product Owner, Aberdeen Investments



[Read more →](#)

“ In a line of business where every second counts towards catching criminals or managing an ambulance fleet, the **4x reduction in recovery** times with Veeam ensures that we don't let our clients down.”



Shlomi Ishai

Infrastructure and Security Manager, Ituran



[Read more →](#)

Ready to put Salesforce archiving on autopilot?

Learn more about Veeam Data Cloud for Salesforce

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READ THE SOLUTION BRIEF: [VEEAM.COM/VEEAM_BACKUP_SALESFORCE_SOLUTION_BRIEF_DS.PDF](https://veeam.com/veeam_backup_salesforce_solution_brief_ds.pdf) →

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