

**sage**

People

# Data Exports for Backups



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# Backing up your data

You can use Salesforce's Data Export functionality to back up data in your Organization. Data Exports generate a set of comma-separated value (CSV) files with your data and can be scheduled on a monthly or weekly basis. The exports are available to download for 48 hours after completion.

When preparing your exports, Salesforce recommends that you:

- Plan ahead. Since you cannot estimate how many requests are ahead of your Organization, kick off the export ahead of deadlines so that you have a sufficient buffer.
- Choose only those objects, whose data you actually need. Reducing your export file size will definitely help in getting you to the smaller queues which would improve queue wait times.
- Evaluate whether selecting "Include images, documents, and attachments" and "Include Salesforce Files and Salesforce CRM Content document versions" is required for every export. Selecting these in every other export or once per month for example can reduce completion time.
- Keep deleted record counts to a minimum. When possible, please empty your recycle bin and have Support run Physical Deletes against your Organization to reduce the number of hard deleted records.
- Consider altering your export's scheduled date/time. It's common for many Organizations to schedule exports at the end of the calendar week, choosing different or off-peak dates/times may also help to reduce wait times.

Refer to Salesforce Help topics for more information.

## Creating a data export in Salesforce

The following section draws on Salesforce documentation. Sage People takes care to ensure that the information drawn from Salesforce documentation is current, but Sage People does not guarantee the accuracy of the information or that use of the information will ensure correct and faultless operation of the service to which it relates.

Refer to the Salesforce Help topics for the latest available information.

For the most current version of the following steps, refer to the Salesforce Help (<https://help.salesforce.com/home>) and search for "export backup data".

1. From **Setup**, enter **Data Export** in the Quick Find box, then select **Data Export** and **Export Now or Schedule Export**.
  - The **Export Now** option prepares your files for export immediately. This option is only available if enough time (a minimum of 7 days for weekly exports and 29 days for monthly exports) has passed since your last export.
  - The **Schedule Export** option allows you to schedule the export process for weekly or monthly intervals.
2. Select the desired encoding for your export file.
3. Select **Include images, documents, and attachments** and **Include Salesforce Files and Salesforce CRM Content document versions** to include these items in your export data.

Including special content in the export increases data export processing time.
4. If you want to have spaces instead of carriage returns or line breaks in your export files, select **Replace carriage returns with spaces**. This selection is useful if you plan to use your export files for importing or other integrations.
5. If you're scheduling your export, select the frequency (only available for Organizations with monthly exports), start and end dates, and time of day for your export.
6. Under **Exported Data**, select the types of data to include in your export. If you aren't familiar with the terminology used for some of the types of data, Salesforce recommends that you select Include all data. Note the following:
  - Formula and roll-up summary fields are always excluded from exports.
  - If your Organization uses divisions, data from all divisions is included in the export.
  - If your Organization uses person accounts and you are exporting accounts, all account fields are included in the account data.
  - If your Organization uses person accounts and you are exporting contacts, person account records are included in the contact data. However, the contact data only includes fields shared by contacts and person accounts.
  - For information on field limitations, see the Salesforce Field Reference Guide.
  - The **Include all data** option selects all objects for export at the time the checkbox is selected. For a recurring scheduled export, be sure to reselect the Include all data option to include newly created objects.
7. Select **Start Export** or **Save**.

Salesforce creates a zip archive of CSV files and emails the user who scheduled the export when it's ready. The email address of this notification cannot be changed. Exports complete as soon as possible, however Salesforce cannot guarantee the date and time of completion. Large exports are broken up into multiple files. To download the zip file, follow the link in the email or select **Data Export**. Zip files are deleted after 48 hours after the email is sent (not including weekends). For example, if the email is sent on a Friday, the zip file is deleted on Tuesday.