CapStorm

Salesforce Data & Metadata Backup with Salesforce Data Security

Chartered company serving the public purpose

A business that champions funding for single-family and multi-family housing.

This 50-year-old organization has an ongoing mission to make all forms of housing affordable across the United States. The result is a Fortune 500, government-sponsored enterprise that both maintains housing stability and acts as a global thought leader in the housing market. Salesforce is used as a key CRM, with a myriad of sensitive loan data. CapStorm's partnership assures that the data stored in Salesforce is protected against accidental data loss or corruption with the level of data security only found in a self-hosted solution.

Industry
> **Public Sector**

Company Size
> **10,000+**

Specialities
> **Housing**
> **Finance**
> **Compliance**

Tech Stack
> **Salesforce**
> **On-Premise Hosting**
> **Microsoft SQLServer Reporting**
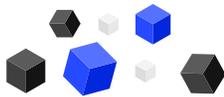
Problem

The organization's Salesforce utilization increased monthly with growing data volumes and user counts. There was no way to securely protect this data against accidental loss or intentional corruption.

Salesforce data created by this organizations 10,000+ employees is highly sensitive, containing personal identifiers used in the mortgage industry. These were stored within the Salesforce platform, but a Salesforce backup solution was not in-place. This technology gap left the business in risk of data loss In addition, the Salesforce organization was under active development with frequent structure changes to accommodate growing CRM demand.
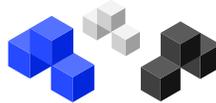
Solution

1. **Secure Data Backup**
   Self-hosted databases contain incremental Salesforce data extracts.

2. **Salesforce Metadata Backup**
   Salesforce metadata is backed up and automatically versioned, giving the users the ablity to rollback.

3. **Schema Replication**
   Ongoing Salesforce development means that the structure also rapidly changes, High fidelity backup required that the structure of Salesforce be mimicked in the underlying backup.

Outcome

Reduced risk with a self-hosted Salesforce business continuity solution.

Increased data visibility with a backup solution that provided validation and verification of data completeness.

Streamlined recovery operations with tested Salesforce data restore procedures.

And secure, on-premise hosting that follows a strict security protocol.