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Salesforce Data Retention and Destruction Policy

FOR SALES CLOUD AND SERVICE CLOUD

**A NOTE FROM CLOUDKETTLE:**

As the hub of customer data, Salesforce is a key consideration in security and privacy compliance frameworks. Having a Data Retention and Destruction Policy is necessary to comply with many regulatory frameworks, including; SOC 2 and ISO.

It is also best practice for enterprises to minimize the amount of data kept in Salesforce in case the organization ever experiences a breach. By regularly deleting data from Salesforce, it will help mitigate both the liability and impact of any potential breaches. Lastly, having a Data Retention and Destruction Policy helps to improve Org speed and user experience by eliminating unneeded data.

This template was built for enterprise Salesforce teams and should be populated
with your organization’s relevant information in the yellow highlighted areas.
**Once completed, remember to update the Table of Contents and delete all grey “note” boxes including this instruction box from the cover page.**

Salesforce Data Retention and Destruction Policy

 **Organization:** **insert company name**
**Org ID: insert OrgID**

**Policy:** Salesforce Data Retention and Destruction Policy

**Effective Date:** **insert date**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Revision** | **Rev. Date** | **Description** | **Prepared By** | **Approved By** | **Approved Date** |
| **1** |  |  |  |  |  |
| **2** |  |  |  |  |  |

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# Purpose

This policy exists to set out the principles for the safe retention and destruction of data stored in insert company’s Salesforce org.

# Scope

The policy covers all data stored within the Salesforce insert OrgID, including all personally identifiable information (PII). It refers to the collection, transformation, accessing, updating, transferring and destruction of digital data specifically as they occur in this instance of Salesforce.

This policy may impact, but does not extend to cover integrated databases, including the insert company product database, data warehouse, marketing automation platform.

## Application to Parties

This policy applies to all insert company officers, employees, partners, contractors and services providers that may have access to the Salesforce org. It is the responsibility of all the above parties to familiarize themselves with this Policy and ensure their compliance.

# Administration

This policy is administered by the insert company insert job title and managed on a day to day basis by the insert name of who will manage this on a day to day basis.

Special Considerations for Salesforce Data

## The Recycle Bin

Some types of data deleted in Salesforce’s Sales Cloud are moved to the “Recycle Bin” upon deletion. Users can see their own deleted records in the Recycle Bin, but in addition, Salesforce Users with Modify All Access can see all deleted data across the entire org.

Items from the Recycle Bin can be reviewed and also restored by Users that have access to them. In Salesforce terminology this is “Undeleting” a record.

Deleted records remain in the Recycle Bin for 15 days, and can be restored during that time. Users with the “Modify All Data” permission can empty the recycle bin to remove these records permanently in advance of this. After 15 days, deleted items are purged from the Recycle Bin, and once purged, they cannot be recovered.

For more information on this topic see Salesforce’s documentation at

<https://sforce.co/37Ayn96>

## Salesforce Backups

insert company’s process for backing up Sales Cloud and details around this.

## Salesforce Sandboxes

Insert company’s Salesforce subscription comes with the ability to create “Full” and “Partial” sandboxes that are recreations of the full production instance of Salesforce, but with either a complete “Full” or partial “Partial” replica of data. As a result, these two types of sandboxes will contain data about customers and prospects.

A separate license for Salesforce Data Mask can be purchased to anonymize sandbox data. For more information on this topic see Salesforce’s documentation at: <https://sforce.co/30PckKy>

Salesforce allows for the refreshing of sandboxes, which wipes all existing data in a Full or Partial sandbox and creates a new version that replicates what is in the production instance. At that time, any data that was deleted from the production instance will cease to exist in the sandbox.

Insert company’s sandbox refresh policy is as follows:

# Policy

## Retention Period by Data Type

These standards are outlined in the insert company’s overall data retention policy, which can be located at insert link.

### Inter Company Communication

**Description**

Internal communication used to manage operations and not required for any regulatory, compliance or auditing purposes.

* Internal communication including email and other correspondence.
* Uniquely identifiable customer data.
* Interactions with customers including complaints and other items that are not significant.
* Departmental policies and procedures.

**Retention Period**

* Not longer than 3 years.

**Impacted Salesforce Objects and Records**

This needs to be updated.

### Drafts and Duplicates

**Description**

Business record and internal communication drafts, working files, and duplicates including, all short term or transitory information.

**Retention Period**

* Not longer than the Official Record (System of Record).
* Notwithstanding the specific time period for this category, personal data shall not be kept for longer than is necessary for the purposes for which it was obtained.
* When duplicate records are combined using the “Merge” feature in Salesforce, one record is actually deleted, while the other is appended. In this context, there is no legacy data available on one of the two “merged” records, other than what remains in the Recycle Bin.

**Impacted Salesforce Objects and Records**

This needs to be updated.

### Internal Business Intelligence and Reporting

**Description**

* All business performance metrics including, but not limited to, budgets, forecasts, financial analysis, and leadership reports.
* Business records including business planning, internal projects, internal reporting and competitive analysis.
* Internal reports including revenue, pricing, profitability, and employee utilization reports.

**Retention Period**

* Not longer than 10 years.
* Notwithstanding the specific time period for this category, personal data shall not be kept for longer than is necessary for the purposes for which it was obtained.

**Impacted Salesforce Objects and Records**

This needs to be updated.

### IT Service Management

**Description**

Items related to access management, identity management, reviews of access privileges, requests for access and IT service requests.

**Retention Period**

* 2 years.
* Notwithstanding the specific time period for this category, personal data shall not be kept for longer than is necessary for the purposes for which it was obtained.

**Impacted Salesforce Objects and Records**

This needs to be updated.

### Device Monitoring

**Description**

Device system activity and application monitoring logs.

**Retention Period**

* Not longer than 18 months.
* Notwithstanding the specific time period for this category, personal data shall not be kept for longer than is necessary for the purposes for which it was obtained.

**Impacted Salesforce Objects and Records**

This needs to be updated.

### Salesforce Backups

**Description**

Procedures and details needed to restore Salesforce data or metadata in the event of an accidental or malicious incident that causes destruction.

* Insert information on backups, what data is backed up and how.

**Retention Period**

* Not longer than 45 days; or, retain per insert company’s Salesforce backup schedule.
* **NOTE:** for backed up data, particularly PII; see the retention category that pertains to the business purpose or use of the archived data.

**Impacted Salesforce Objects and Records**

This needs to be updated.

### Electronic Files

**Description**

Electronic files, when the electronic files are not considered significant or needed for regulatory compliance.

**Retention Period**

* Not longer than 3 months.
* Notwithstanding the specific time period for this category, personal data shall not be kept for longer than is necessary for the purposes for which it was obtained.

**Impacted Salesforce Objects and Records**

This needs to be updated.

### Customer Communications and Communications Preferences

**Description**

Communication records with customers across company channels including emails and phone recordings, that are stored within Salesforce.

**Retention Period**

* For individual communication preferences (for example “Email Opt Out”), Indefinite, until the User changes their choice.
* Notwithstanding the specific time period for this category, personal data shall not be kept for longer than is necessary for the purposes for which it was obtained.

**Impacted Salesforce Objects and Records**

This needs to be updated.

### Customer Inquiries

**Description**

Customer inquiries and responses sent through email, website forms, email-to-case records, etc., that are stored within Salesforce (for example on the Contact or Case object).

**Retention Period**

* Not longer than 3 years.
* Notwithstanding the specific time period for this category, personal data shall not be kept for longer than is necessary for the purposes for which it was obtained.

**Impacted Salesforce Objects and Records**

This needs to be updated.

### Leads and Partners

**Description**

Internal information regarding leads, partners, vendors, service providers, referrals, and other business relationships.

**Retention Period**

* Not longer than 2 years.

**Impacted Salesforce Objects and Records**

This needs to be updated.

### Other Data Types

The insert company Record Retention Policy includes types of data not outlined above. That full policy can be found at insert link.

# Updates

This policy will be reviewed and updated at a minimum, on an annual basis by the insert company Salesforce team.

## Automated Deletion

Where possible, the insert company Salesforce team will put in place automated processes to delete and destroy data in accordance with the timelines outlined in this policy. Where not possible, a manual method will be documented and adhered to, with at least one additional team member providing quality assurance for the work of the original team member completing the task.

# Data Access

Insert company’s corporate data access policy. This policy could also reference a Salesforce Admin policy (or that policy could be included in this).

# Breaches

Insert reference to insert company’s policy on this.

# Exception Requests

Insert reference to insert company’s policy on this.

# Approved Exceptions

|  |  |  |  |
| --- | --- | --- | --- |
| **Exception Item** | **Requested By** | **Approved By** | **Approved Date** |
|  |  |  |  |
|  |  |  |  |

# Object Table

This table contains the Objects (types of records in the database) in insert company’s instance of Sales Cloud and/or Service Cloud information on the retention policy of each.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Object** | **Retention Period** | **Removal Type** (Automated or Manual) | **Data Type** | **Notes** |
|  |  |  |  |  |
|  |  |  |  |  |

 **FINAL THOUGHTS FROM CLOUDKETTLE:**

We hope this template provided your team with the outline and critical elements
to create your own Salesforce Data Retention and Destruction policy. If you have any questions about this template or Salesforce Sales Cloud optimization, reach out today.

[REQUEST A FREE CONSULTATION](https://www.cloudkettle.com/contact-us/)
We love helping enterprise organizations transform Salesforce to drive revenue.

