

Guiding Force Consulting recommends every organization perform the following maintenance activities on a regular basis to keep their Salesforce instance(s) up-to-date, data backed up and with clean data.

Weekly

- Schedule a data export to an external hard drive or cloud-based data back-up solution (exports records, contacts, etc.)
 - Setup > Data > Data Export

Every Other Month

- Refresh Sandbox(es) to back-up configurations and set-up
 - Setup > Environments > Sandboxes > Refresh

Quarterly or Three times per year (In time with Salesforce Releases)

- Run a system Health Check to review/fix any issues that may compromise the security of your system.
 - Setup > Security > Health Check > Fix Risks
- Run a records Health Check to identify problems in your record data.
 - NPSP Settings > System Tools > Health Check > Run Health Check
- Review/Address security alerts.
 - Setup > Security > Security Alerts > Click on "Release Updates" link
- Test new Salesforce features/updates in Sandbox before they hit Production
 - You'll receive an email with future updates and release dates