

Managing your Salesforce CRM storage

Abstract

Understand your storage limits, learn to make the most of your storage, and find out about your options for expanding storage.

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As our customers' applications mature and grow more complex, so do their storage needs. As of the [Winter '09 release](#), storage options have increased substantially, as shown in the summary table below.

Your storage is split into two buckets: file storage and data storage. File storage holds attachments, anything in the Documents tab, and anything in the content library. Data storage holds everything else—all your records, including all tasks, activities, accounts, opportunities, custom object records, and so on.

In this document, you'll find out:

- :: About storage limits by edition
- :: How to view your storage usage
- :: How to make the most of your storage
- :: About AppExchange apps related to storage management

Storage limits by edition

The amount of storage for both files and data depends on your edition, as shown in the table below.

	Group Edition	Professional/Enterprise Edition	Unlimited Edition
Data storage	1GB across all users	20MB/user or 1GB minimum	120MB/user or 1GB minimum
File storage	1GB across all users	600MB/user or 1GB minimum	600MB/user or 1GB minimum

Many customers ask just how many records can be stored in 1GB. The answer is about 500,000 records. As announced at Dreamforce 2009, the content library functionality of Salesforce CRM will be made available to all customers, but (as of the publication of this document) it has not been determined whether additional storage will be made available as well.

View your storage usage

Click *Setup / Administration Setup / Data Management / Storage Usage* to get a breakdown of your usage by object, user, and individual files. You'll also see the difference between file storage and data storage usage, as shown below.

Administration Setup

- Manage Users
- Company Profile
- Security Controls
- Communication Templates
- Translation Workbench
- Data Management
 - Analytic Snapshots
 - Import Accounts/Contacts
 - Import Leads
 - Import Solutions
 - Import Custom Objects
 - Data Export
 - Storage Usage
 - Mass Transfer Records
 - Mass Delete Records
 - Mass Transfer Approval Requests
 - Start a New Trial
 - Mass Update Addresses
 - Sandbox
 - Data Loader

Overall Top Files by Storage Utilization

File Name	File Type	Storage
salesforce_callscripting_admin_guide.pdf	Document	370 KB
Self Service Portal Files	Document	333 KB

Current File Storage Usage

Record Type	Record Count	Storage	Percent
Documents	201	2.4 MB	90%
Attachments	4	284 KB	10%

Top Users by Data Storage Usage

User	Storage	Percent
Monica Mayne	1.1 MB	23%
Admin User	1.1 MB	22%



Strategies for making the most of your storage

You have several options for managing your data so you don't exceed your storage usage limits, including purchasing additional storage, using mass-delete tools or applications to delete records and attachments, and storing attachments locally.

Purchase additional storage

You can purchase and immediately activate additional storage—data storage in 50MB and 500MB blocks; file storage in 1GB and 10GB blocks. Contact your account executive for additional information.

Mass delete records

Which tools or applications you can use depends on the number of records you want to delete, the types of records to be deleted, and your edition of Salesforce CRM.

Examples of records you might want to mass delete include:

- :: Dead opportunities or opportunities with no activity in the past 12 months
- :: Unconverted leads with no activity in the past 12 months
- :: Accounts with no activity in the past 3 years
- :: Archived tasks and events older than 5 years
- :: Closed cases older than 5 years
- :: Expired solutions

Note: Before mass deleting with any of the following tools, we recommend that you **archive** a copy of the data to be deleted, in case you need to restore those records later. Also, always test mass deletions on a small sample of test records first.

We also recommend that you request a **weekly export of your data** for backup. This service is included with Enterprise and Unlimited Editions and is available for purchase with Professional Edition. Please contact your account executive for more information.

The following tools are available for mass deleting records:

- :: You can delete up to 250 records at a time, including accounts, leads, activities, contacts, cases, solutions, and products. Go to *Setup / Administration Setup / Data Management / Mass Delete Records*.
- :: For Enterprise and Unlimited Edition customers, there's a [free AppExchange tool](#) you can install into your Salesforce CRM org. This application adds custom buttons to list views so you can mass delete the objects mentioned above **plus** campaigns, opportunities, opportunity products, contracts, and assets.
- :: You can mass delete standard and custom object data using the [Excel Connector](#) (Professional, Enterprise, and Unlimited Editions) or the [Apex Data Loader](#) (Enterprise and Unlimited Editions). Both tools can be used to create extract files in Excel. You can sort and filter that file—typically by Date or Create Date—and use it to mass delete the records.
 - Because the Excel Connector has a limit of about 67K records per worksheet, you may need to use multiple worksheets.
 - The Apex Data Loader can delete up to 50,000 records at a time. You may need to use multiple extract files for very large data volumes.

Note: If you plan to extract and delete an extremely high volume of records (> 250,000), we suggest you request a data export and let salesforce.com generate the extract files for you.



The Apex Data Loader's wizard helps guide you through a powerful mass data editing tool.

Delete attachments

As with deleting records, your options depend on the size of your attachments and your edition.

- ∴ View your storage usage to see your largest attachments and drill down on those you want to delete. Go to *Setup / Administration Setup / Data Management / Storage Usage*.
- ∴ Enterprise and Unlimited Edition customers can download the [Attachment Manager](#) app from the AppExchange to view, sort, filter, and delete multiple attachments.
- ∴ Create lists with attachments with the Excel Connector and Apex Data Loader. These tools do not support the extraction of attachments, but you can use them to create lists of attachments to be deleted in bulk. **Note:** You cannot use these tools to archive attachments to be deleted: We recommend the weekly export service to extract attachments for archiving.

Store attachments locally

Consider storing files locally on your computer or in a network folder and creating a custom link that points to that folder or file. For example, you could create a custom link on the account page layout that points to the network folder in which account-related files are stored. Of course, the user needs the appropriate connectivity and authority to access your network while using Salesforce CRM.

Need more options? Check out the AppExchange

You'll find additional options for increasing your storage on the AppExchange, ranging from cloud storage services to integrations between Salesforce CRM and your network drives. Check out the following options for cloud storage and network drives:

- ∴ [Appirio Cloud Storage](#) – Recommended for customers with high storage needs, this app lets you securely expand storage right from the Salesforce CRM interface by creating a link between Salesforce CRM and Amazon S3. There's also a [version](#) for Professional Edition customers.
- ∴ [S-Drive](#) – Another service that uses Amazon S3's secure cloud storage, this application creates storage space on secure, hosted servers that can be integrated with Salesforce CRM. This tool works with Professional, Enterprise, Unlimited, and Developer Editions.
- ∴ [External attachments](#) – With this app, you can easily attach and access attachments directly from records in Salesforce CRM. This free app is available for Enterprise and Unlimited Edition customers.
- ∴ [FTP Attachments](#) – Use this app to store attachments on your servers, including FTP, S3, and even hard disk. This tool, which also includes versioning capabilities, works with Professional, Enterprise, Unlimited, and Developer Editions.

Summary

With the increases in storage, most customers will have plenty of room for their records and files. However, if you still need to expand your storage capabilities, this table summarizes your options:

	Professional Edition	Enterprise Edition/ Unlimited Edition	Additional cost?	Data volume
GENERAL				
Purchase additional storage	Yes	Yes	Yes	High
Weekly data export service (for archiving)	No	Yes	Yes	Any
RECORDS				
Manual deletions	Yes	Yes	No	Low
Mass-delete records	Yes	Yes	No	Medium
Mass-delete application	No	Yes	No	Medium
Mass deletions and archiving using Excel Connector	Yes	Yes	No	High
Mass deletions and archiving using Data Loader	No	Yes	No	High
ATTACHMENTS				
Manual deletions	Yes	Yes	No	Low
Mass deletions using Attachment Manager application	No	Yes	No	Medium
Mass deletions using Excel Connector	Yes	Yes	No	High
Mass deletions using Data Loader	No	Yes	No	High
Store locally/access via custom link	Yes	Yes	No	Medium/High
Document management applications on the AppExchange	Varies	Yes	Varies	Medium/High

For More Information

Contact your account executive to learn how we can help you accelerate your CRM success.

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