



CRM Export & Backup Checklist

Pre-Backup Planning

Review backup strategy, define scope, and schedule.

Scheduled Backup Date

Enter date...

Scheduled Backup Time

Estimated Backup Size (GB)

Enter a number...

Scope of Backup (e.g., all records, specific objects)

Write something...

Backup Method

- ☐ Native CRM Tools
- ☐ Third-Party Solution
- ☐ API Integration