

CapStorm for Financial Services

Ensuring Salesforce Data Access and Seamless Integration

Financial institutions depend on Salesforce to manage customer relationships, support operations, and meet regulatory obligations. CapStorm helps these teams take full control of their Salesforce data – ensuring it's always backed up, secure, and available for internal reporting, analytics, and audits.

Industry Challenges

Financial institutions must manage Salesforce data in an environment where the stakes are high – compliance is mandatory, access is critical, and downtime is costly.

- **Regulatory Pressure** – SOX, GLBA, and PCI compliance demand full-fidelity backups and long-term retention
- **Data Accessibility** – Key data is often locked within Salesforce, making internal analysis and reporting difficult
- **M&A Complexity** – Org consolidations during mergers require secure, repeatable, and transparent data migration workflows
- **Testing Limitations** – Inadequate sandbox seeding leads to slow development cycles and limited QA reliability
- **Storage Costs** – Growing data volumes strain Salesforce limits and budgets without an archiving strategy

Use Cases in Action

CapStorm enables financial teams to maintain full ownership and visibility of their Salesforce data throughout the data lifecycle.

- **Audit-Ready Backup & Recovery** – Meet compliance mandates with full-fidelity backups, point-in-time recovery, and transparency into what changed, when, and why
- **Near Real-Time Integration with Internal Systems** – Replicate Salesforce data into internal reporting systems, data warehouses, or risk engines without API bottlenecks
- **Org Migrations and Sandbox Seeding** – Streamline platform unification projects and test with production-grade data that's securely masked for UAT or QA
- **Long-Term Data Governance & Retention** – Enforce granular retention policies, track change history, and maintain data lineage for audit trails
- **Fraud Detection & Risk Oversight** – Monitor sensitive fields and support investigations with detailed change logs and historical snapshots

How We Solve Challenges

Our platform combines incremental data extraction, compliance controls, and flexible integrations to meet the exacting needs of the financial sector.

- **CS:Enable** – Powers secure, incremental replication of Salesforce data and metadata into your private environment
- **CS:Govern** – Powered by CS:Enable, enables automated compliance enforcement, data masking, and detailed field-level change tracking
- **Database Connectors** – Seamlessly integrate Salesforce data into Snowflake, AWS, Azure, SQL Server, or any internal data store for analytics, modeling, or reporting

Who Benefits?

CapStorm supports a wide range of roles within financial organizations, helping teams reduce risk, improve agility, and ensure compliance.

- **Salesforce Admins** – Simplify backup, recovery, and sandbox seeding workflows
- **Platform Owners** – Maintain security and control across every Salesforce environment
- **Data Architects** – Enable flexible, real-time integrations into internal systems
- **Risk & Compliance Officers** – Ensure continuous compliance and audit readiness

Why CapStorm?

CapStorm delivers Salesforce data solutions purpose-built for financial services. Our platform operates behind your firewall or in your private cloud – never relying on third-party storage or vendor lock-in. With near real-time sync, full metadata and schema coverage, and field-level traceability, CapStorm helps financial institutions stay compliant, agile, and fully in command of their Salesforce data.

Keywords

Backup • Backup and recovery • Data backup • Data management • Data recovery • Data replication • Data restore • Disaster recovery • Incremental backup • Metadata backup • Restore metadata • Business continuity • Data archive • Data extraction • Data governance • Data integration • Data migration • Data security • Metadata management • Sandbox seeding • Data access • Data analytics • Data compliance • Data protection • Data reporting • Self-hosted software • Compliance • Data control • Recovery