

Salesforce data management, **on prem.**

Create archive policies, preserve complete record relationships, reclaim Salesforce storage, and keep historical data accessible from infrastructure you control.

Move history out. Keep its value.

Salesforce should stay focused on active work. Vivly moves inactive history to infrastructure you control without stripping away the context that makes those records useful.

Reclaim storage

Reduce Salesforce storage pressure and production load after the archive is verified.

Preserve context

Keep relationships, activity, conversations, files, and attachments connected.

Maintain access

Let teams find archived history inside the Salesforce experience they already know.

Archive is not deletion.

Vivly separates inactive history from the production workload while preserving controlled access, lifecycle evidence, and recovery paths.

Customer-controlled by design

The service, database, credentials, state, and backups remain inside your enterprise environment.

Built for governed teams

Roles, retention rules, legal holds, audit history, and verified operations remain part of the archive lifecycle.

One controlled path from policy to storage reclamation.

Every stage is visible and reviewable. Production records are not made eligible for removal until their archive has been checked.

Connect	Connect a Salesforce organization to the customer-controlled archive destination.
Define	Select standard or custom objects and define which records should move to history.
Preview	Review the expected records and surrounding dependencies before the policy runs.
Archive	Capture the record graph, activity, files, and lifecycle evidence while tracking progress.
Verify	Reconcile the expected source scope with the archived result.
Reclaim	Choose when verified records can be removed from Salesforce production storage.
Access	Search and review historical records inside Salesforce or through the Vivly Dashboard.

Preserve the business story, not just the primary record.

Flat exports can leave teams with disconnected rows. Vivly keeps the surrounding context needed to understand and use archived history.

Relationship-aware capture

- ✓ Parent, child, and related-record links
- ✓ Activities, emails, comments, and tasks
- ✓ Files and attachments
- ✓ Structured and queryable archive data

Verified reclamation

- ✓ Completeness checks before removal
- ✓ Separate archive and reclaim decisions
- ✓ Lifecycle evidence for each job
- ✓ Protection against partial results

Controlled recovery

- ✓ Recovery of eligible Salesforce records
- ✓ Controlled archive rollback
- ✓ Protection for records shared by overlapping policies
- ✓ Visible recovery activity

Schema-aware history

- ✓ New Salesforce fields carried into future runs
- ✓ Older archived fields preserved
- ✓ Schema health visibility
- ✓ Supported repair paths from the dashboard

The result: historical records remain understandable, defensible, and usable long after they leave production.

Turn one-off clean-up into a repeatable operation.

Vivly gives data and operations teams one place to define policies, follow every run, and respond when attention is required.

Policy management

- ✓ Standard and custom Salesforce objects
- ✓ Guided filters or precise SOQL selection
- ✓ Scope preview before execution
- ✓ On-demand and recurring schedules
- ✓ Prevention of duplicate capture

Job control

- ✓ Live progress and record counts
- ✓ Pause, resume, and cancel controls
- ✓ Recent activity and service health
- ✓ Storage and capacity visibility
- ✓ Detailed job logs

Notifications

- ✓ Archive completion and failure alerts
- ✓ Reclaim and recovery events
- ✓ Capacity notifications
- ✓ Configurable email preferences

Retention controls

- ✓ Retention rules by policy
- ✓ Legal holds for protected history
- ✓ Controlled deletion at end of lifecycle
- ✓ Attributable lifecycle activity

Historical access for users. Lifecycle control for administrators.

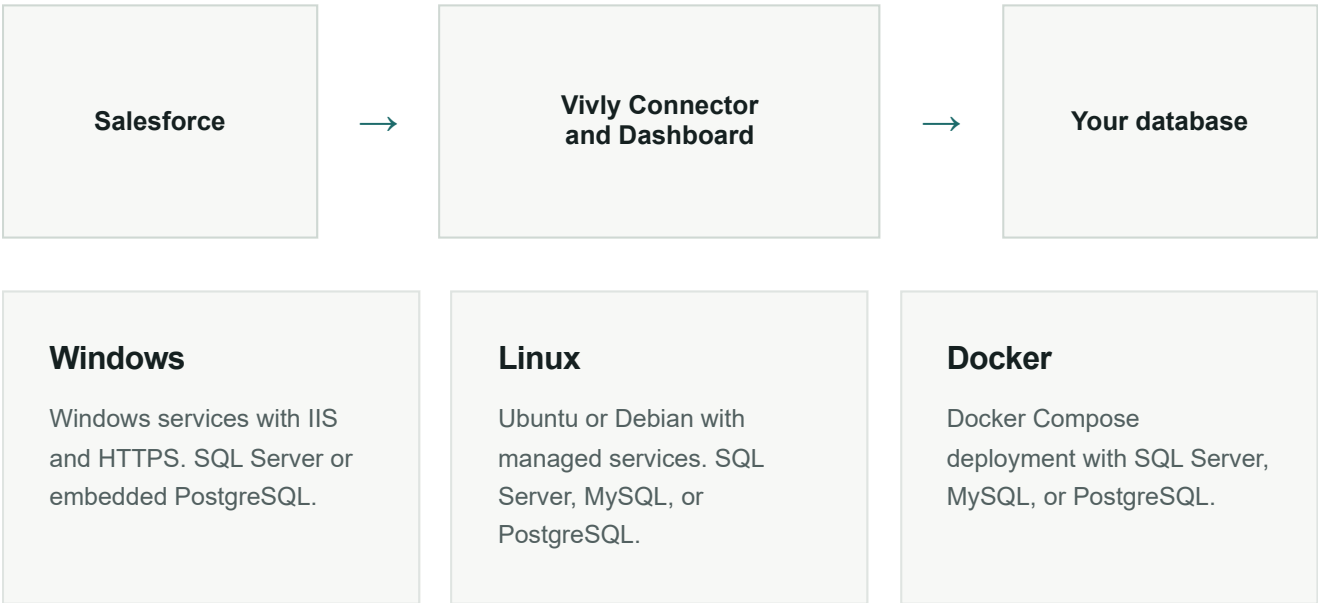
Inside Salesforce

- ✓ Browse archived objects and record counts
- ✓ Search by ID, name, subject, status, and date
- ✓ Open fields, related lists, and files
- ✓ Review combined email, comment, and task timelines
- ✓ Read-only experience for business users

Governed administration

- ✓ Multiple Salesforce environments per installation
- ✓ Owner, environment admin, operator, and reader roles
- ✓ Environment-scoped membership and job control
- ✓ User capacity management and owner recovery
- ✓ Shared, attributable activity history

Deployment options



Database compatibility: Microsoft SQL Server 2017+, PostgreSQL 13+, and MySQL 8.0+. Connections use TLS and sealed credentials. The connector reaches Salesforce without exposing the archive database to inbound internet access.