Pipedrive Data Backup Explained

PIPEDRIVE

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It's not uncommon to find situations of people having lost or destroyed their Pipedrive data by mistake, or they may have given their login credentials to trusted assistants who then erased their data intentionally (Ugh!).

Your organization's customer and sales data are among its most precious assets, but many businesses still fail to establish adequate backups.

Some companies erroneously assume SaaS solutions such as Pipedrive do not need backups, while others fail to implement sufficient backups for on-premise systems.

We'll discuss the methods and techniques for backing up your Pipedrive databases in-depth as we delve further in this article.

Benefits of Pipedrive backup

Pipedrive offers an extensive collection of tools and features for controlling your sales funnel. It can contain a vast amount of sales and customer data saved in databases, which is essential for your company's day-to-day operations.

Even though the probability of losing this data is almost zero, it is typically advantageous to do routine Pipedrive backups. Below are some of the benefits of backing up your Pipedrive data:

- You will be able to retrieve the data and restore your information even if Pipedrive is inaccessible.

- Thanks to Pipedrive backups all of your consumer databases are protected and safe against unforeseen occurrences.
- If there is an error in your primary database machine, you can quickly switch to your backup data. This ensures that service is not interrupted and that no data is lost.

The different Pipedrive backup options

To create a Pipedrive data backup, you can either use the:

- Native Pipedrive data backup functionality or
- Different ways to export your data from Pipedrive, manually or automatically.

The native Pipedrive backups are done via Amazon Web Services, regardless of where you are. This method is to ensure that your data is safe and secure. Pipedrive solely uses HTTPS connections, which encrypt all data transmitted between the program and the server.

On the other hand, exporting data offers more customization and can be done at a higher frequency. You can export all or certain types of Pipedrive data into a data warehouse, a spreadsheet, or many other destinations. There are several methods for doing so, and we'll explain them in the following sections.

How to automate Pipedrive backup in just a

For more security and flexibility, it's better to to channel Pipedrive data to another app with the help of a third-party solution. This allows you to update the backup copy iof your data as often as every 15 minutes – while native backup only updates once a day. Another advantage is flexibility – you can transfer your data to a spreadsheets app or data warehouse, where you can manage data with ease.

In this example, we show you how to automate Pipedrive backup with Coupler.io, a popular data analytics and automation platform. It allows you to transfer Pipedrive data into Excel, Google Sheets, BigQuery, Looker Studio, and Power BI. Your data in the destination app will be refreshed according to the schedule you choose.

Once the data is secured in your spreadsheet or data warehouse, you can process it for analytics purposes or simply keep it as a backup. If any data is lost or Pipedrive goes down, you'll be able to access your backup and import the missing pieces into Pipedrive.

Let's see how to automate Pipedrive backup in three simple steps.

1. Extract your data automatically

First, sign up for Coupler.io (no credit card required, free trial availiable). Select Pipedrive as a data source and choose your destination. It can be a spreadsheet app (Google Sheets, Excel), a data warehouse (BigQuery), or BI tool (Looker Studio, Power BI).

Select the apps to connect

Start by picking your data source and your data destination

Source
Take my data from

[P] Pipe... ⌄

→

Destination
Save my data to

[▦] Goog... ⌄

PROCEED

Then, connect to your Pipedrive account and select the data category you want to back up – for example, deals. If you need to back up multiple categories, you can add them to the same importer using the **+Add one more source** button.

2. Preview and transform your data

You can preview the data you are going to export and edit your dataset. In particular, you can:

- Hide unnecessary columns
- Filter and sort data
- Rearrange and rename columns
- Perform calculations
- Combine data from several accounts or from different apps

Then, cconnect to your chosen destination app. For example, if you're backing up your data from Pipedrive to Google Sheets, you'll need to connect your Google account.

3. Schedule updates and manage your data

Enable **Automatic data refresh** and set up the schedule for your data backups. Once this is done, Coupler.io will automatically keep the backup version of your Pipedrive data up to date.

In the end, save and run the importer. Your Pipedrive data will be loaded and backed up in your destination app. In this example, we got an auto-updating spreadsheet with Pipedrive deals data.

	AC	AD	AE	AF	AG	AH	AI	AJ	AK	AL	AM	AN	
	org_id.cc_email	org_id.value	stage_id	title	value	currency	add_time	update_time	stage_change_ti	active	deleted	status	
	imperial-money@	1	1	New deal	123	NGN	2022-05-10 21:1	2022-05-10 21:2		FALSE	FALSE	won	
	imperial-money@	3	1	New deal2	23494	NGN	2022-05-10 21:2	2022-05-10 21:2		TRUE	FALSE	open	
	imperial-money@	4	1	Examples deal	2345	USD	2022-05-11 05:0	2022-05-11 05:0		TRUE	FALSE	open	
	imperial-money@	5	1	Tester deal	2345	USD	2022-05-11 05:0	2022-05-11 05:0		TRUE	FALSE	open	

Bonus tip: *instantly visualize Pipedrive data with a **free dashboard template:***

– Pipedrive CRM Dashboard

– Pipedrive Sales Dashboard

Click the Readme tab of the selected template to see how to use it.

Here on this topic for you

Native Pipedrive data backup

Pipedrive automatically backs up your data including [Pipedrive activities](#), deals, etc. The native backup feature is not visible in the Pipedrive interface; it operates behind the scenes. Pipedrive backups and stores your data in the following ways.

• Pipedrive creates encrypted nightly backup files for all customer databases and database machines and securely stores them off-site.

• Pipedrive synchronizes the databases in real-time using database replicas. If the primary database is damaged, no data will be lost as Pipedrive will preserve the copy in one of the replicas.

One of the significant drawbacks of this native method is that a backup is performed only once a day (nightly). Anything added and then lost throughout the day won't be recoverable.

Pipedrive backup

Pipedrive also offers several ways to manually export your data. It works for Deals, Contacts, Leads, Products, and others.

The following methods are available:

- Backing up with **Export Data**
- Backing up with **List View**
- Backing up with **Details View**

When using either of the first three methods, CSV and .xls/.xlsx (Excel) are the supported formats for exporting data from Pipedrive. We'll explain them in the following sections.

Aside from the first option, you can export the data by selecting from the individual data categories, which include Deals, Contacts, Products, etc.

All three methods for exporting data are perfectly okay if you don't need to back up data on a regular basis but, instead, need to fetch certain categories every now and then – for example prior to an important update to your database.

However, if data protection is your main focus, it makes sense to perform backups frequently. With the manual methods, you would need to run exports every time updates are made to your data (unrealistic) or, at least, do so multiple times throughout the week. This may get tedious or virtually impossible in the long run. That's why we recommend automating the export process.

Data

You can export and back up your Pipedrive data by using the Export Data feature. To do this, follow these steps:

Note: Only administrators have the ability to export data.

- Go to **"..." (More) > Export data.** The Export data option will allow you to export data related to Leads, Deals, Organisations, People, Activities, Products, and Notes.

- Choose the data type and click CSV or Excel.
- A green Download button appears next to your export file in the list of available exports.

Custom reports on your Deals, Organizations, and Products may be exported from the List view. Only administrators and users with the necessary rights, on the other hand, have the ability to export and backup data from list views. To do this, follow these steps:

- For this example, we will use the Deal category. First, go to the List View of an item.

Deals   Q Search Pinedrive   +

- On the right-hand side, click on your name in the drop-down > Filters.

activity ...   tor ⚙

🔍 Search owner or filter

★   👤   ☰
Favorites   Owners   Filters

All deleted deals

All lost deals

All open deals

All won deals

More than 3 months old deals

Rotten deals

➕   Add new filter

🔍 Search owner or filter

- Filter for the type of data you want to export. For example, if you only wanted to export open deals, you would select the filter **All open deals** to only pull up deals that fit that criteria.

🔍 Search owner or filter

★ Favorites	👤 Owners	☰ Filters

ctivity ...   or ⚙

ur Kelvi
ur Kelvi

All deleted deals

All lost deals

All open deals   ☆ ✏

All won deals

More than 3 months old deals

Rotten deals

➕ Add new filter

- Once you've chosen your filter, click the gear icon to pick the data fields and columns you want to export. You may mix and combine fields relating to Deals, People, and Organizations to obtain exactly what you need.

- To export, click "..." > **Export filter results.** Pipedrive will then export all the information that fits the filter and columns that you set.
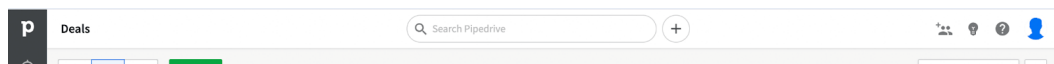
ext activity ...	Owner	
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Export filter results...

Data import...

Convert filter results to leads

Show on map

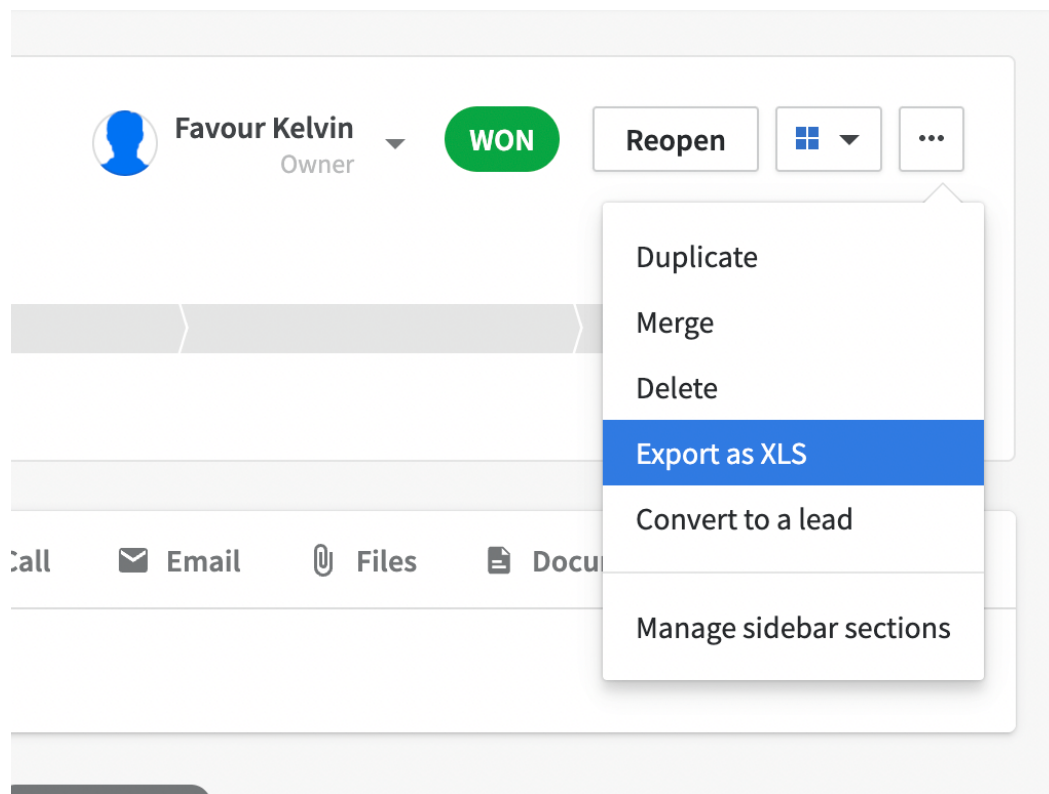# Backing up with the Detail View

Only Deal information from the Details view may be exported in an .xls format, which can be used to backup your Pipedrive data. This action can only be performed by admin users or users who have been granted the necessary permission settings. To do this, follow these steps:

• Go to the Deal's detail view interface.

• Click on the particular Deal that you want to export.

- In the upper right area, click the "..." symbol > Export as XLS. The spreadsheet will include information on the deal, as well as any related individuals or organizations.

What to do if Pipedrive is down?

Pipedrive doesn't go down very often, but if it does, you'll want to have a backup of your data somewhere else. This enables you to keep working throughout the outage and

chapter on automated exports from Pipedrive, is suggested to be prepared for such circumstances.

Can you back up Pipedrive to get all the client info?

Yes, client info can be found in the Contacts data entity. So, exporting this information will allow users to get all the information about their clients. You can export and backup your client information using either Coupler.io or the Pipedrive alternative backup methods.

Pipedrive Backup – Recap

Pipedrive performs native backups automatically, while data export for backup may be done manually or automatically. As shown in the table below, the various methods for exporting your Pipedrive data for backup have distinct data categories and export formats.

Backup Method	Data Category	Export Format
Export data	Deal, Organization, Leads, People, Product, Activities,	CSV or Excel

TRY COUPLER.IO

List view	Leads, People, Product, Activities	CSV or Excel
Detail View	Deal	Excel
Automatic Data Export: Coupler.io	Deal, Organization, Leads, People, Product, Activities, Files, Call logs	Google Sheets, Excel, BigQuery, Looker Studio, Power BI

Aside from exporting data for backup, you can easily modify and analyze your data once it has been exported from Pipedrive.

To restore and recover your exported data, you can use the Pipedrive Import Data feature to import data. The supported formats for importing your data are the Excel (.xls and.xlsx)