Backups & Updates

Backups

The CRM's data must be backed up regularly so it can be restored after a mistake or a failure.

> **Know your backup status.** Confirm with whoever maintains the servers *what* is backed up, *how often*, *where it's kept*, and — crucially — that a **restore has actually been tested**. A backup you've never restored is a hope, not a backup.

- Before any risky operation (bulk delete, large import, configuration change), a quick **export** of the affected records is a personal safety net — see Chapter 4 — Managing Data .

Software updates

- EspoCRM and its extensions receive updates. They are applied **Sandbox first**, verified, then Production — using CBM's deployment tooling, **never** hand-edited on the server.
- Don't chase the newest release the day it ships; let it settle and update deliberately.

> Updates are a technical operation. As the staff admin you generally **request and coordinate** an update rather than perform it. The mechanics live in the deployment runbooks (the CRM Builder tool and the CBM repository). See Getting Help and Next Steps.

Security certificates (HTTPS)

- The `https://` certificates for the CRM and the docs site **renew automatically** — nothing to do. The only exception: if a browser warns about an expired or invalid certificate, flag it

(see Troubleshooting & Recovery).

Where the technical details live

- Server / deploy / upgrade / recovery procedures → the **CRM Builder** tool and the CBM repository runbooks.
- Documentation-site specifics → `infrastructure/CBM-Documentation-Site.md` in the CBM repository.

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