

## Questions Log Feature Focus: Salesforce - Introduction to Sandboxes

8/19/2015

Question	Answer
<p>We have been on Salesforce for 5 years - and use Sandboxes all the time for all our development efforts. We find that we sometimes step over each other in terms of moving changes to Production. Performance edition - 30 sandboxes! Suggestions?</p>	<p>A version control system is probably your best solution in conjunction with adding more rigor to your change control process. See this Trailhead module for an overview of this topic: <a href="https://developer.salesforce.com/trailhead/alm_deployment/alm_source_control">https://developer.salesforce.com/trailhead/alm_deployment/alm_source_control</a></p>
<p>Studying for app certification and want to maximize sandbox use</p>	<p>Here is a video series to review: <a href="https://www.youtube.com/playlist?list=PLnobS_RgN7JYgscwWaWzv0cozE9vePb6b">https://www.youtube.com/playlist?list=PLnobS_RgN7JYgscwWaWzv0cozE9vePb6b</a></p>
<p>We have connections to other environments and need to refill test data and connect to stage environments, what would you suggest</p>	<p>We realize this is an issue for many customers and have plans to allow for post-refresh scripts to run in a sandbox with the purpose of updating settings to reflect test environments #safeharbor</p>
<p>We have more than one sandboxes for several test environments, and we want to see how this session can help us to manage those with best practices. Can you point me to additional resources?</p>	<p>For Premier customers, take a look at the Sandbox Design Accelerator which you can find on our Accelerators site: <a href="http://www.salesforce.com/services-training/add-ons/accelerators/">http://www.salesforce.com/services-training/add-ons/accelerators/</a></p>
<p>I've worked with sandboxes before but am not always successful in managing them with our team. We have more than one admin working on changes to various record types and sometimes the changes sit in the sandboxes for a while so we need to manage the timing. Suggestions?</p>	<p>A version control system is probably your best solution in conjunction with adding more rigor to your change control process. See this Trailhead module for an overview of this topic: <a href="https://developer.salesforce.com/trailhead/alm_deployment/alm_source_control">https://developer.salesforce.com/trailhead/alm_deployment/alm_source_control</a></p>
<p>Hi, newly certified ADM 201 and Dev 401,so I thought this would be great for learning more about Sandbox Implementation</p>	<p>This is a great set of videos to start with: <a href="https://www.youtube.com/playlist?list=PLnobS_RgN7JYgscwWaWzv0cozE9vePb6b">https://www.youtube.com/playlist?list=PLnobS_RgN7JYgscwWaWzv0cozE9vePb6b</a></p>
<p>Instead of doing a complete refresh on Sandbox, is there any other method to update the list of users similarly in Production? Users get added and removed constantly in Production, and we wanted to know if there are</p>	<p>You would need to create these users in your Sandbox as users are data</p>

<p>alternate ways to reflect this wo refreshing all data in Sandbox..(EE)</p>	
<p>Reports that get scheduled in our Production somehow is activated similarly for some reports in Sandbox...is there a way to disable those reports or a setting somewhere to turn this off altogether?</p>	
<p>Question on a use case: I want to create several sandboxes for users that need them for demos. As part of that, I want to load the exact same starting data set in every sandbox, preserving the data relationships across objects. The amount of data is small (&lt;10 custom objects, less than 50 test records per object). What's the best way to handle something like this? Is multiple partial sandboxes the only option, or is there a way to automate the starting data set into all of the sandboxes? Thanks.</p>	<p>I believe we addressed this question during the session, but the short answer is to use an ETL tool or even Excel to manage the data. If it's always the exact same data, it should be a one-time effort using Data Loader to pull the data out of your source system and save it off to CSV files for repeated imports. An easy way to extract the data initially is by using the Scheduled Export feature to produce the CSV files for your entire org.</p>
<p>Please discuss how to do staging environments for integrations with other systems, and how to switch between staging and production keeping the same code</p>	<p>An idea that we are reviewing is the request to allow you to refresh one sandbox to another. This would allow you to refresh dev or test sandboxes from a staging sandbox that retains test settings. If this is of interest, please vote on the following Idea:  <a href="https://success.salesforce.com/ideaView?id=08730000000JawvAAC">https://success.salesforce.com/ideaView?id=08730000000JawvAAC</a></p>
<p>In the Q&amp;A session, please mention a limitation of the Partial Copy sandbox: while it will ensure that if a Master record is copied, records related to it by Master-Detail relationships will also be copied, it will NOT require records related by Lookup relationship to be copied. That was an unwelcome surprise when I created my PDS, and it made me wish I hadn't spent the money on the PDS and instead had manually loaded data into a Dev sandbox. Perhaps there is a process for this?</p>	<p>Great idea, vote it up!  <a href="https://success.salesforce.com/ideaView?id=08730000000DkosAAC">https://success.salesforce.com/ideaView?id=08730000000DkosAAC</a></p>
<p>I never really understood or could grasp the concept of Sandbox Preview or what all the hype was around this...could you explain what is</p>	<p>Sandbox Preview allows you to review functionality of the new release in your org, you would always want to test this and assess impact. This is especially true for this Winter '16</p>

<p>so important or significant regarding the Sandbox Preview and no Preview?</p>	<p>release!</p>
<p>Can you create multiple users for a sandbox or can only the admin user login? Or can all users by default login to the sandbox environment?</p>	<p>Users can log into the sandbox at <a href="https://test.salesforce.com">https://test.salesforce.com</a> by appending .sandbox_name to their Salesforce usernames. For example, if a username for a production organization is user1@acme.com, and the sandbox is named “test”, then the modified username to log into the sandbox is user1@acme.com.test.</p>
<p>How do you 'refresh' a sandbox?</p>	<p>See <a href="http://help.salesforce.com/apex/HTViewHelpDoc?id=data_sandbox_create.htm">http://help.salesforce.com/apex/HTViewHelpDoc?id=data_sandbox_create.htm</a> for full details on how to create and refresh a sandbox. Let me know if you have any further questions.</p>
<p>What are the use cases to use Ant Vs change sets</p>	<p>Ant is a command-line tool and can therefore be executed by automated scripts. This is a critical feature when your change control model includes automated pushes as would be the case when performing continuous integration. Ant also reduces the risk of human error, as change sets are dependent on admins including the correct components for deployment. Change sets provide a simple to use, graphical tool for simple deployment requirements.</p>
<p>How do you keep the training sandbox up to date with all new features</p>	<p>Features will be applied to all sandboxes as they are rolled out by Salesforce to each of our instances. If you are referring to customizations, you will need to include your Training org in your overall SDLC plan to receive pushes either from a “golden” copy such as your staging org or production.</p>
<p>Which type of sandbox would you recommend for training? The Full or Partial. I take it the Dev ones would fulfil this requirement?</p>	<p>This depends on how much data you are training against and how often you need to refresh the data. For ex if you are doing analytics training and need reports to show production-quality output, a Full is required. If you hold weekly training classes and need the</p>

	ability to refresh the sandbox prior to each class, a partial will allow this.
Spinning sandbox from an already sandbox is this possible?	Vote on this idea: <a href="https://success.salesforce.com/ideaView?id=08730000000JawvAAC">https://success.salesforce.com/ideaView?id=08730000000JawvAAC</a>
How many full sandboxes come with U	Unlimited Edition includes licenses for 1 Full sandbox, 5 Developer Pro sandboxes, and 15 Developer sandboxes.
Can I change the name of a Sandbox on refresh, or do I need to delete it and then recreate with new name?	Yes its possible to change the name on refresh
Major issue we face in sandbox refresh is the server number changes. Example cs30 will change to cs19. This disturbs all our integrations, saml sso etc. Anything by which we can keep the same server number while refreshing ?	There is no option currently to choose which instance your sandbox will refresh to. This is intentional for us to be able to properly load balance sandbox refresh requests.
Do emails send from a salesforce sandbox to actual user if you use partial or full copy sandboxes?	Whenever you create or refresh a sandbox, user email addresses are modified in your sandbox so that production users don't receive automatically generated email messages from the sandbox. User email addresses are appended with an example domain (@example.com), and the original @ sign is replaced with =. This modification ensures that the system ignores these email addresses. For example, a user email of awheeler@universalcontainers.com in production becomes awheeler=universalcontainers.com@example.com when migrated to sandbox. If you want sandbox users to receive automatically generated emails as part of testing, you can correct the email addresses while logged in to the sandbox.
Can Enterprise have more than (1) Developer Sandbox at No Charge?	Enterprise will only have one sandbox however, you can purchase additional sandboxes.

<p>Are there any items that are not able to be added to Change Set?</p>	<p>Here are the available items in Change Sets:  <a href="https://help.salesforce.com/HTViewHelpDoc?id=changesets_about_components.htm">https://help.salesforce.com/HTViewHelpDoc?id=changesets_about_components.htm</a></p>
<p>When would you not all dependencies to a change set? Is that best practice to add all dependencies to change set?</p>	<p>It is generally a best practice to add all dependencies unless there is a specific reason that you do not want the dependent object to migrate. See H&amp;T for details:  <a href="https://help.salesforce.com/HTViewHelpDoc?id=changesets_outbound_dependencies.htm">https://help.salesforce.com/HTViewHelpDoc?id=changesets_outbound_dependencies.htm</a></p>
<p>What is the best practice regarding adding Profiles to change sets? Do you normally do that when creating new fields, record types, etc?</p>	<p>Profiles can be tricky and should be handled on a case-by-case basis. Take a look at this article from Adam Torman on the subject of migrating profiles:  <a href="http://www.salesforcehacker.com/2013/05/dude-wheres-my-permission.html">http://www.salesforcehacker.com/2013/05/dude-wheres-my-permission.html</a></p>
<p>If I add users to a sandbox and need to refresh my users are deleted is there a work around</p>	<p>Not that I am aware of. The refresh will copy over the Users from Production. If the users do not exist in Production, they will not be created when you refresh a Sandbox. You could certainly use a data loading tool such as Workbench to rapidly recreate your users after your refresh.  A solution for adding new users is to add them to Production first and deactivate them. Then, they will flow to your sandbox and can be enabled there (at least in the full).</p>
<p>Currently using just one Sandbox to do testing on new fields, record types, etc. but i have worked with change sets, etc.</p>	<p>If you have more than one, you may consider a sandbox for this upcoming release to explore, some pretty amazing features coming your way!</p>
<p>How would you know which components to include in change set (that you have all related objects?)</p>	<p>Using the Add/View Dependencies on the Change Set record will identify many of the cross-dependencies such as related objects.</p>
<p>I'm on eu1 will sandbox preview be available?</p>	<p>Sandbox preview is possible on all instances; however, depending upon your instance, e.g. EU1, will dictate whether you need to refresh or not refresh in order to get access to the preview. I hope this makes sense - please let me know if you have any further questions. EU1 is the</p>

	<p>production org, you need to see this blog to see what your actions are:  <a href="https://www.salesforce.com/blog/2015/07/salesforce-winter-16-sandbox-preview.html">https://www.salesforce.com/blog/2015/07/salesforce-winter-16-sandbox-preview.html</a></p>
<p>Will a change made to a field after it has been added to a change set also change it in the change set? Or does it need to be removed and re-added?</p>	<p>A change made to the properties of a field after it has been added do not require you to remove and re-add it (with the exception of changing the field name).</p>
<p>When the data is copied into a Partial Copy Sandbox, are the records inter-related? In essence, will the Contacts, Opportunities and Cases that get copied be related to the accounts that are copied?</p>	<p>see  <a href="https://help.salesforce.com/HTViewSolution?id=000206556&amp;language=en_US">https://help.salesforce.com/HTViewSolution?id=000206556&amp;language=en_US</a> for full details</p>
<p>Do emails to customers send from a sandbox?</p>	<p>Salesforce, such as email addresses in contact records. To avoid sending unsolicited email from your sandboxes, manually invalidate or delete all email addresses in your sandboxes that don't belong to users of the sandbox. When testing outbound email, change contact email addresses to the addresses of testers or an automated test script.</p>
<p>Any possible way to copy production org to a free developer org?...maybe an app?</p>	<p>This is not possible at the moment. Production orgs can only be refreshed to a sandbox generated from that production org.</p>
<p>I'm working on a project in a Sandbox right now. If it is not refreshed before Sept. 4, what will happen when my Production environment is updated with the Winter Release? Will my Sandbox be out of sync with production or will it automatically update? This project may take several months and I don't want to lose the changes I'm working on. Should I try to wrap it up before the release?</p>	<p>Take a look at this blog post. It contains all of the details on the Winter Preview:  <a href="https://www.salesforce.com/blog/2015/07/salesforce-winter-16-sandbox-preview.html">https://www.salesforce.com/blog/2015/07/salesforce-winter-16-sandbox-preview.html</a></p> <p>If the sandbox is on an upgrade instance, it will be upgraded but your customizations will not be lost.</p>
<p>How do you Migrate using the Ant tool?</p>	<p>Sam: See Randy Goh's video recording in the All Platform Specialists group and let us know if that addresses this question</p>
<p>Can send info on Excel connector?</p>	<p>We have partnered with Microsoft to build capabilities into MS Power Query that allow you</p>

	<p>to use Excel to query Salesforce data sources:  <a href="https://support.office.com/en-US/article/What-s-new-in-Power-Query-936B2FCA-4168-41AD-BBBD-7B83856B6776">https://support.office.com/en-US/article/What-s-new-in-Power-Query-936B2FCA-4168-41AD-BBBD-7B83856B6776</a></p>
<p>Is the excel connector SSO enabled?</p>	<p>MS Power Query uses the OAuth protocol to establish a connection to Salesforce and not SAML.</p>
<p>Could you talk briefly about managing changes from multiple sandboxes - how do you prevent overwriting changes from other deployments? Especially for changes that have been "sitting" in sandbox for a long time?</p>	<p>A version control system is probably your best solution in conjunction with adding more rigor to your change control process. See this Trailhead module for an overview of this topic:  <a href="https://developer.salesforce.com/trailhead/alm_deployment/alm_source_control">https://developer.salesforce.com/trailhead/alm_deployment/alm_source_control</a></p>
<p>Just to confirm, creating a new Sandbox today will allow for the Winter preview?</p>	<p>It will depend upon which instance your sandbox currently resides - see  <a href="https://www.salesforce.com/blog/2015/07/salesforce-winter-16-sandbox-preview.html">https://www.salesforce.com/blog/2015/07/salesforce-winter-16-sandbox-preview.html</a> for full details</p>
<p>How do you get Premier Points?</p>	<p>Join us on Aug 27th for all the details you need Expert Hour registration for Premier Customers:  <a href="https://attendee.gotowebinar.com/rt/7164064088947389697">https://attendee.gotowebinar.com/rt/7164064088947389697</a></p>
<p>What is a SandBox Design Accelerator?</p>	<p>Full list of Accelerators here -  <a href="http://www.salesforce.com/services-training/add-ons/accelerators/">http://www.salesforce.com/services-training/add-ons/accelerators/</a></p>
<p>When we refresh sandbox, sometimes we get a random character string prefix to username. and we have to use that string to login next time and fix your username to previous one. why do we get this? and how can we avoid this?</p>	<p>Help and Training Article on username changes:  <a href="https://help.salesforce.com/HTViewHelpDoc?id=data_sandbox_implementation_tips.htm">https://help.salesforce.com/HTViewHelpDoc?id=data_sandbox_implementation_tips.htm</a></p>
<p>Would like to know more about available tooling for comparing sandbox instances. Objects, Fields, Code etc.</p>	<p>Many of our partners have developed tools based on our APIs to perform such comparisons. One such tool is SnapShot from DreamFactory which you can find on AppExchange:  <a href="https://appexchange.salesforce.com/listingDetail?listingId=a0N300000016YhyEAE">https://appexchange.salesforce.com/listingDetail?listingId=a0N300000016YhyEAE</a></p>

Resources for Workbench, can you share?

Here you go:

<https://developer.salesforce.com/page/Workbench>