Salesforce Sandbox Environment

What is a Sandbox?

A sandbox is a replica of some or all of your Salesforce instance. It allows for testing to be done with all the configurations you have in place but it ensures you can do this correctly without anything being broken.

Benefits of a Sandbox:

- Also for changes to be testing before they are pushed into your production environment.
- When functionality becomes available it can be tested to see if it will be a good fit for before it's live.
- Can be used for training of new or current staff.
- Mandatory for development (coding) changes.

Types of Sandboxes

- Developer sandbox
- Developer Pro sandbox

Both Developer sandbox setups will not allow for your data to be copied over. Instead you will have your setup detail (fields, workflows, etc). Test records will need to be created on the appropriate objects in order to test anything else.

- Partial Copy sandbox (most useful to you) - Allows for some of your data to be copied over.
- Full sandbox - Allows all of your data to be copied over.

Both the partial and full sandbox will come with an additional cost but will allow for more adequate testing. If you are interested in a sandbox environment please contact your Salesforce executive.

Rallybound Setup

When setting up your Salesforce connection you will need to select the "Sandbox" checkbox in the popup.

You will need to install the Rallybound Fields Package and Rallybound Apex Sync Package, which can be done using the links below:

- https://test.salesforce.com/packaging/installPackage.apexp?p0=04ti0000000tAlP
- https://test.salesforce.com/packaging/installPackage.apexp?p0=04tf1000000DDnl

After you've created your sandbox, you'll be able to log in at https://test.salesforce.com by appending .sandbox_name to your Salesforce username.

Once you've logged in, you're free to test, train, and play! The sandbox will behave the exact same way as your production instance but you won't affect the operations of your organization. General best practices when working within a sandbox is to push any changes made from the sandbox into production. This can be done using "Change Sets", or alternatively changes can be manually changed in the production environment once tested. Be careful when pushing from your sandbox to production, as any conflicting changes to your code and configuration (known as metadata) will be overwritten.

Important: After testing with a Sandbox in Rallybound, please contact Rallybound Support to clear history of our syncing to the sandbox.