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## Partial Copy Sandboxes! + Salesforce Sandboxes 101 for Nonprofits

Best Practices, Blog, Getting Started



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Great news, nonprofit admins: Partial Copy sandboxes are free for [Salesforce Lightning Enterprise Edition](#) (which every Nonprofit Success Pack user has)! You may not be jumping for joy yet, but let me tell you why you should be.

A *sandbox* is a replica of some or all of your Salesforce instance, with a key difference: if you break something, it doesn't affect your real Salesforce system. And now you may be asking, why would you use a sandbox?

### The Many Benefits of a Salesforce Sandbox

Sandboxes serve many useful functions, and the Partial Copy sandbox should be a good fit for the needs of even the largest nonprofits.

1. It's a zero-risk way to test changes before pushing to *production* (the term for your regular Salesforce instance).
2. You can safely explore new functionality.
3. It's great to conduct trainings because you don't have to clean up any data or worry about breaking anything.
4. It's mandatory for *development* (coding) changes.

### Types of Sandboxes

Salesforce has four types of sandboxes: the *Partial Copy sandbox* (most useful to you), the *Full sandbox*, the *Developer sandbox*, and the *Developer Pro sandbox*.

**Partial Copy Sandbox:** Has a 5 GB overall limit, and a 10,000 record per object limit. You are very unlikely to hit this limit. If you do, you can still select the most relevant portions of your production instance to copy. You can refresh what you have selected in your system every 5 days. It's free for all Lightning Enterprise users.

**Full Sandbox:** A complete replica of your instance, good for more sophisticated uses like performance and load testing. You can refresh every 29 days, making it

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not ideal for development. It has significant usage fees.

**Developer Sandbox:** Features only your organization's configuration, without any of the data. It is limited to 5 MB of test or sample data. It's also free, and intended for testing in isolation with little to no data.

**Developer Pro Sandbox:** Also features only your organization's configuration, but has 1GB of storage for sample data. Has usage fees.

For more about sandbox types, you can refer to this [Salesforce Sandbox article](#) and [an Introduction to Environments](#) for a more detailed and technical writeup.

## How to Use Them

The Partial Copy sandbox is free, so there's no reason not to make one! To get started, search for and select "Sandboxes" in setup, then click "New Sandbox." To set it up, [follow these instructions](#).

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 (with a few small twists relating to email that we've mentioned in the next section), but you won't affect the operations of your organization.

Here is another useful link for [refreshing, activating a refreshed sandbox, and learning about various sandbox statuses](#) you may encounter.

If you've made a change, or multiple changes, that you want to push from the sandbox to production, you can [deploy using change sets](#). Or, simply make the changes manually again in production once you have tested them.

Be very careful when pushing from your sandbox to production, as any conflicting changes to your code and configuration (known as *metadata*) will be overwritten. Only this metadata will move from your sandbox, no real data will be moved to production.

## Tips to Avoid Email Pitfalls

There are a few failsafes that Salesforce has put in place in the sandboxes to avoid issues relating to email automation. If you do want to test email, you'll need to take some extra steps.

1. By default, sandboxes have all email/outbound notifications turned off. This is so you don't start emailing accidentally from there. Many of our clients have gone to test email functions and they don't work. You can enable them again, but keep in mind that real emails can go out from them. Remember, the sandbox is a full copy of your database. To do so, go to Setup, then Email Administration. Select Deliverability and change the Access level in the Access to Send Email section from "no access" to "all email." Be very cautious.
2. As an extra precaution, in your sandbox, Salesforce changes email addresses on all user IDs to fake email addresses. This is so users don't get emails from sandbox. If you do want to test emails to particular users, you need to manually change these on each user record. You also must check the box "generate new password and notify user immediately" at the bottom of each record, otherwise you won't get the verification code to confirm the email change (because it will go to the fake email address).

If you do enable email, you should also deactivate each workflow that triggers an email to be sure you aren't firing these accidentally. To do this, go into Setup and select Create. Go to Workflow, then Workflow Rules. Hit "deactivate" next to any rule that automatically sends an email. If you want to test a rule, first activate it for testing, then deactivate it.

## When to Use a Sandbox Versus Production

We suggest using a sandbox if you want to:

- make a change in a workflow or a new workflow that will disrupt the working of the current system (first create in the sandbox, test and then deploy to production)
- create a formula or validation rule that will disrupt the working of the current system (test the formula/validation rule before moving it to production)
- add a number of new fields and you'd like to have someone review them before they go "live"
- introduce a new record type and/or page layout
- test a major change to profile/ security/ sharing rules
- create a new object

**Note:** As previously mentioned, a change in trigger or code or any new code must be created in the sandbox before being deployed to production.

One rule of thumb is that you can safely make a change in production when you're changing something with very limited scope, like the name of a field, creation of a button, or a minor change to a profile that won't affect workflow.

## Real Nonprofits Using Sandboxes

The education, foundation and human services nonprofits we work with have used Salesforce sandboxes for many different testing and training purposes. These include:

- Testing of new third-party apps
- Learning new releases for third-party apps
- Ensuring new forms work (for example, applications)
- Troubleshooting new workflows
- Holding trainings for volunteers on their system
- Training up staff on new processes

## Bottom Line

We recommend you create your free Partial Copy sandbox today and get started. There is literally no downside, and it's a great way to test out, teach, and learn about Salesforce in a risk-free environment!

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