



Salesforce Wizard Series

# FROM SANDBOX TO PRODUCTION

Release management for larger or more complicated  
Salesforce Projects

©Marina Cooreman

# From sandbox to production

An insight in Salesforce Release Management

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## Preface

For the past year I have been involved in the release management for a big Salesforce project. During that year we went from inception, through developing code in the DEV sandbox pushing it via a series of sandboxes to production.

The first release was a relatively simple one, nobody was working in the production environment and we could take our time doing it right.

The project became more complicated from a release management point of view, with teams splitting up and each of them going into a different direction. Configuration issues for deployment tools, network settings, proxy settings in different locations... we had it all.

This book reflects all the lessons learned during the project. With the joint efforts of the entire team we have overcome issues for which we didn't find any documentation.

This book was written first and foremost to document the release procedures for future generations. But I hope it will also serve in helping other struggling release managers to shed some light on their project, to avoid making mistakes, to serve as a guideline for how a release management project could be organized.

My everlasting thanks goes to **Gen-C** in Kontich - Belgium, a valued Salesforce Partner, who gave me the opportunity to write this book.

I'm always more than happy to receive comments, both from readers and other release managers. This book is a living work, which means that I will add things as they surface.

I'm proud to present version 1.0 of "From Sandbox to Production"

Enjoy!

## What this book covers

This book covers the following topics

**Chapter 1** : Release management explained, explains all about the use of sandboxes, the release plan and the role of the release manager

**Chapter 2** : Managing Change. Every change you make to an existing configuration creates a risk that something can go wrong. Not only the development team makes changes, but Salesforce itself releases new features three times a year.

**Chapter 3** : Release tools, gives a list of tools that can be used in large scale release projects

**Chapter 4** : Managing the project, gives you an idea of how a complex deployment project can be managed. In our example we use the Agile approach.

**Chapter 5** : Release setup, explains how to set up the sandboxes, the release tools and how a release procedure should look like

**Chapter 6** : The Actual Release, shows you how to prepare for a release and use your tools to carry out a monitored release

**Chapter 7** : Close the circle, demonstrates that the deployment to production is not the end of the process. This section explains how to close the circle and to get everything ready for the next project

**Chapter 8** : Error messages and documentation. Each deployment will present you with a number of errors. This chapter lists the most common and presents you with a solution. It also gives you a list of tools you can use to document your project

# Chapter 1

## Release management explained

### *Introduction*

Developing applications in Force.com, the native language of Salesforce, has never been so easy. The company really focuses on flexibility and point-and-click customization, which makes it easy for non-technical profiles to take care of 80% of all the work that needs to be done.

Smaller projects usually work directly in the production environment or in one of the freely available development sandboxes, which allows them to prepare new functionalities and group the release of them by means of change sets.

However, if you are working on larger projects where several teams are working side by side on developments, it requires a very structured approach to release the new code in the correct environment.

Larger projects never develop in the production environment, where people are working on a daily basis with the functionalities that are available to them. Each release therefor needs to be prepared in an off-production environment, which is called a sandbox.

Sandboxes<sup>1</sup> are available in the following Salesforce editions :

- Enterprise : Full, Partial and Developer pro (paying) and 1 developer sandbox free
- Unlimited : 1 full, 5 developer Pro and 15 developer sandboxes free.
- Performance : contact Salesforce for the exact number of sandboxes.

You can always buy more sandboxes if your project requires you to have a few extra. Please contact your Salesforce sales for this.

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<sup>1</sup> Environment similar to the Production environment but with a limited set of data.



## ***What is release management?***

Salesforce Release Management all about change management. It is what binds all the separate sections of a Salesforce project together. The Release Management Team are the glue that holds the structure, they are the bond that unites them all. That is quite a mouth full and a big responsibility. In fact, the release manager needs to be proficient in :

- Salesforce administration
- Salesforce development basics
- Project management
- Documentation management
- Team management
- Change management
- Risk management
- Communication management

And he or she needs to be a good mediator and diplomat.

Release management is a container that holds changes, new developments, bug fixes and emergency releases. It is responsible for delivering the product that was created by the development team in the correct environment, be it another sandbox or a production environment.