Sandbox Refresh

Pre-Refresh Preparation

Collect Preservation Requirements

Notify all stakeholders to provide a comprehensive list of items they want to preserve during the sandbox refresh:

- Documents
- Profiles
- External client applications
- Permission Set Groups
- Any other customizations or configurations

Create Inventory Documentation

Create a comprehensive Excel spreadsheet documenting all items collected from stakeholders. This will serve as a reference guide throughout the refresh process and for post-refresh verification.

During Refresh

Create Public Group

Create a public group that includes all organization members.

> Users who are not part of the public group will not be able to access the sandbox after refresh. This must be completed before sandbox initialization.

Verify SSO Configuration

Ensure that Single Sign-On (SSO) is properly configured before the refresh completes. Verify the following:

- SSO metadata is correctly loaded
- Identity provider (IdP) settings are accurate
- Certificate and endpoint configurations are valid

Contact ITS security if these are not upto date.

Post-Refresh

Follow Post-Refresh Video Tutorial

[Sandbox Activation Tasks]

Flow Configuration

How to find the flows is a part of the video linked above. The flows in the red box are not necessary to activate. The rest must be activated.

Bulk Correspondence Notification
Bulk Prospect Profile Notification
Create New Task from Follow Up Fields
Internal Closed/Won Email Flow
Opportunity Closed Today
Opportunity Name
Set Business Office G/L Name
Set Contact Award Gift Credit Flag to False
Set Contact Award Gift Credit Flag to True
Set Contact CAE Category
Set Fundraising Campaign Name Text in Gift
Set Fundraising Campaign Name Text in Transaction
Set Recurring Gift Campaign and Fundraising Campaign Text Fields
Set Transaction CAE Category and Recurring Gift Link
Set Transaction Designation Text Fields
Update Batch Recognition Credit Include in Legal Credit %
Update Contact Email when Email Preference Changes
Update Contact Email when the Preferred Email Changes
Update Contact Phone when Phone Preference Changes
Update Contact Phone when the Mobile Phone Changes
Update Gift Designations
Update Mobile Phone when the Contact Phone Changes
Update Opportunity Amount
Update Preferred Email when Contact Email Changes

Additionally, please ensure these flows are active. They are not part of the managed package.

AQC Activity Report from Account
AQC Activity Report from Opportunity
AQC Activity Report from Stewardship

User Access Troubleshooting

If users cannot access the sandbox from their accounts, follow these steps:

1. Navigate to **Setup > Users**
2. Find the user account and click **Unfreeze**
3. Remove the **.invalid** suffix from their email address
4. Check the **Generate New Password** box
5. Click **Save**
6. The user will receive an email with instructions to create a new password

Install Apsona

Download and install the Apsona application suite, find specific links here.

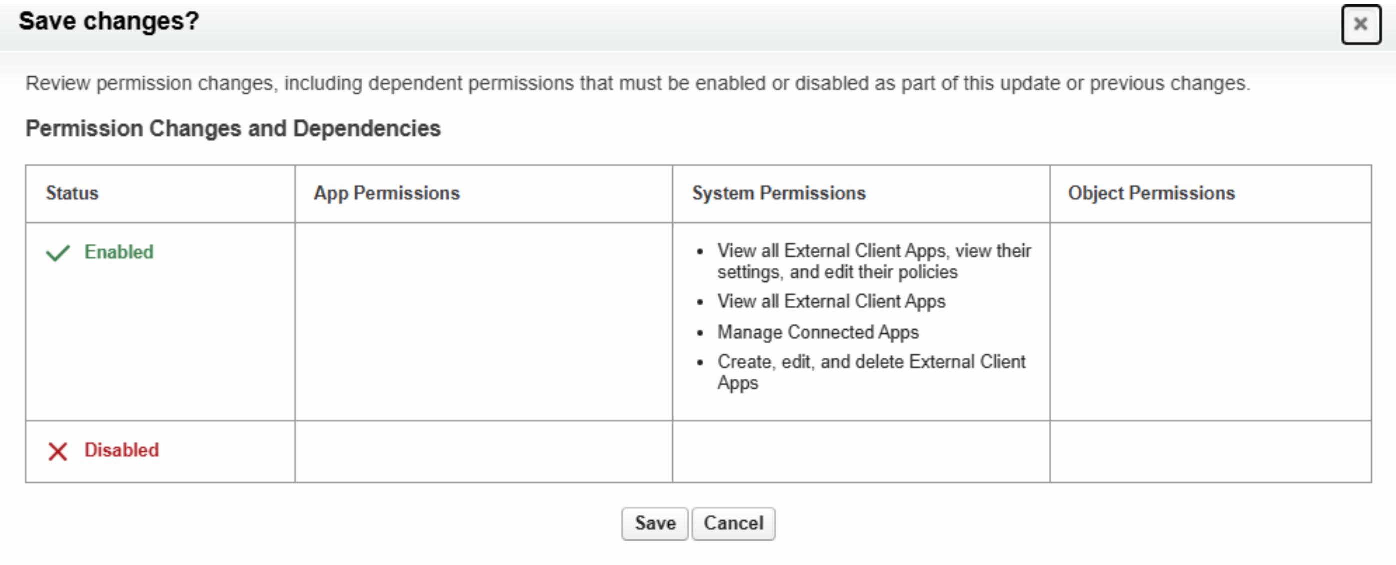
> Consultants recommended installing the Dedupe and Match Add-on. Instructions can be found here.

Configure Profiles

Configure the following profiles based on their specific requirements:

Airflow Connect Profile

The screenshot below summarizes the system permissions to be enabled for this profile. Refer to the Connecting Apache Airflow to Salesforce within the Summer Internship Project book for specification details.



Save changes?

Review permission changes, including dependent permissions that must be enabled or disabled as part of this update or previous changes.

Permission Changes and Dependencies

Status	App Permissions	System Permissions	Object Permissions
Enabled		• View all External Client Apps, view their settings, and edit their policies • View all External Client Apps • Manage Connected Apps • Create, edit, and delete External Client Apps	
Disabled			

Save Cancel

Apsona Reporter Profile

Required Connections:
- [SPECIFY REQUIRED CONNECTIONS HERE]

Recreate Permission Set Groups

Use this excel spreadsheet (recommendations of consultants) to recreate the permission groups/