



ECHO Salesforce Sandbox Guide

This document is intended to help you determine which sandbox is best for your organization's Salesforce development needs. All ECHO clients must have a sandbox available for ECHO's use in order to avoid any disruptions to your operations or end users in production. Depending on the scope of your project, we recommend getting either a Developer Pro sandbox, a Full sandbox, or both.

What is a sandbox?

A sandbox is an isolated copy of your organization's production environment that is used for development and testing purposes. A sandbox will always include a copy of your production organization's metadata, but it may or may not include a copy of your production organization's data.

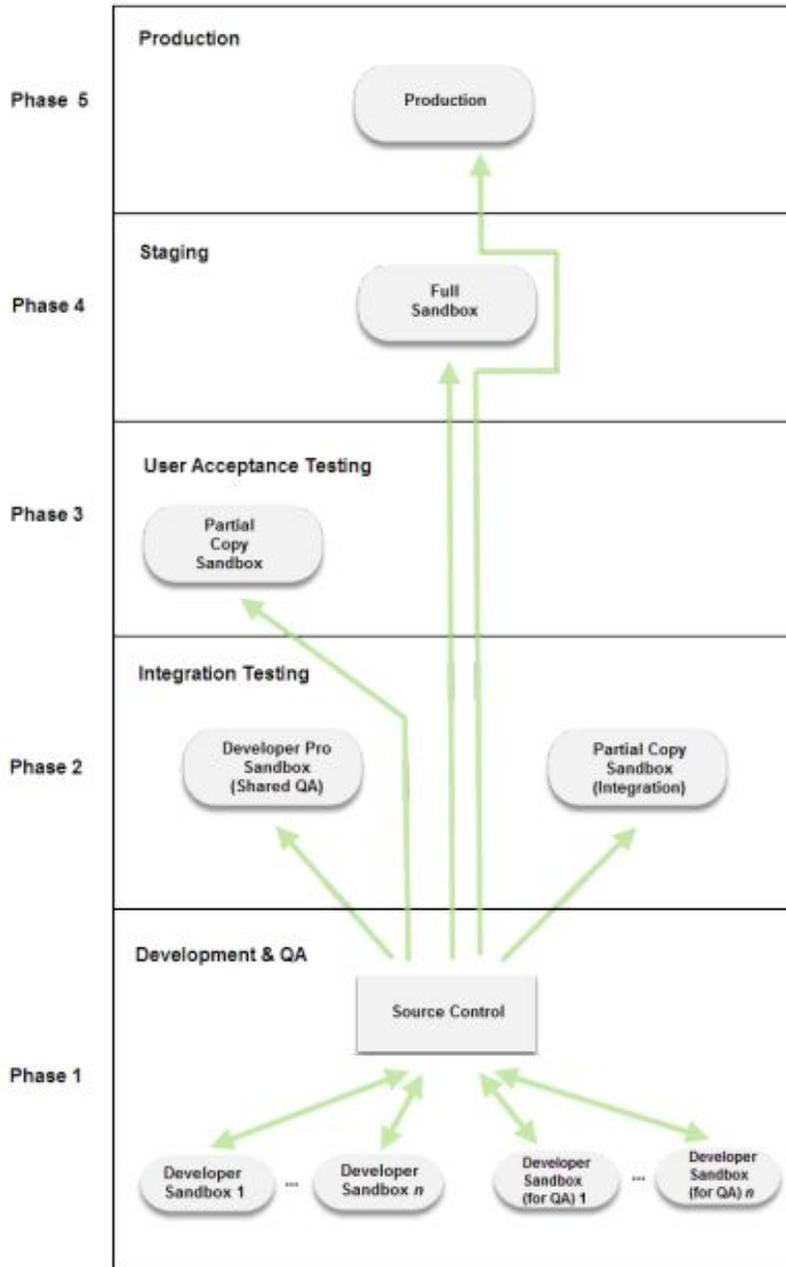
What are the types of sandboxes?

Depending on your edition of Salesforce, your production organization already comes with a number of available sandboxes, but you may have to purchase additional sandbox licenses if necessary.

Sandbox Type	What's Included	Data & File Storage Limits	Refresh Interval	Sandbox Template	Price
Developer	Metadata only	200 MB	1 day	Unavailable	Free
Developer Pro	Metadata only	1 GB	1 day	Unavailable	Contact your Salesforce Account Executive (AE) for pricing.
Partial	Metadata & sample production data	5 GB	5 days	Required	Contact your Salesforce AE for pricing.
Full	Metadata & all data	Same as production org	29 days	Available	Contact your Salesforce AE for pricing.

Which sandbox should I get?

Software development can be very complicated. Some organizations use all four types of sandboxes for development and QA, integration testing, and user acceptance testing (see diagram below). However, not all organizations need such an extensive development cycle. The additional cost and deployment time are important considerations when using multiple sandboxes.

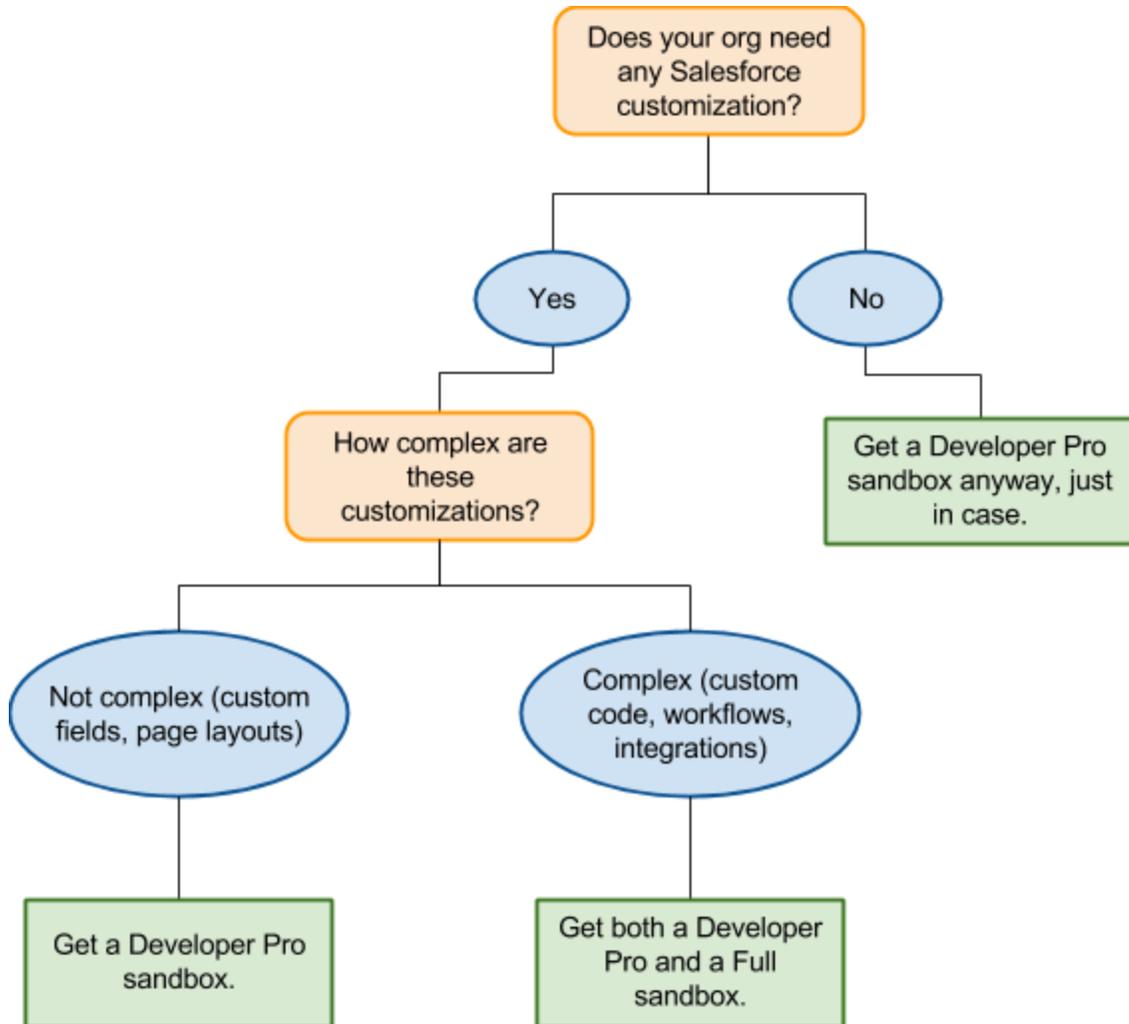




What does ECHO recommend?

ECHO recommends that every organization considers using a Developer Pro and Full sandbox when working with our Software Development team.

You can also use the decision tree below to determine which sandbox(es) is appropriate for your organization's needs.



Developer Pro

A Developer Pro sandbox includes a copy of your production organization's metadata and can store up to 1GB of data. When you give ECHO your user requirements, it may take some time to come up with the best solution. A Developer sandbox is a great place to work through those solutions before deploying the best one to a Full sandbox or to production. If you're brand new to Salesforce and don't plan on doing a lot of customization, a Developer Pro sandbox will work just fine. Contact your Salesforce Account Executive for pricing.



Full

A Full sandbox is a complete replica of your production organization, including metadata and a full copy of its data. If your organization plans on doing any complex customization, then a Full sandbox is necessary to test for any unexpected behavior against your complete data set.

If you are working with ECHO to do major customizations without a Full sandbox, you run the risk of not catching dependencies within your entire organization. When you deploy to production, this can result in errors and unexpected behavior, which ultimately hinders the productivity of your operations and your users. Moreover, it may take more time to resolve these errors in production than it would have if we did proper testing in a Full sandbox before deployment. Contact your Salesforce Account Executive for pricing.

When you purchase a sandbox license, you can determine the activation length -- quarter or year. After that time, the sandbox will expire and all users will be locked out. Please mark your calendars one month ahead of the expiration date so we have ample time to decide whether we will need to extend sandbox activation. Please also share the expiration dates with your ECHO team so that they can plan accordingly.