

THE ESSENTIAL GUIDE TO SALESFORCE SANDBOX SEEDING

Leverage Data Seeding to
Maximize Your Lower-Level Orgs!



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Introduction

To meet the demands of your business users, your Salesforce release pipeline needs to be as streamlined as possible. That starts with having development environments with data that looks like the data in your production environment. And to get it there, you need a quick, easy, and accurate process like automated Salesforce sandbox seeding.

Most Salesforce users agree that manual sandbox seeding is painstaking, labor-intensive, and time-consuming work. For this reason, few companies actually do it.

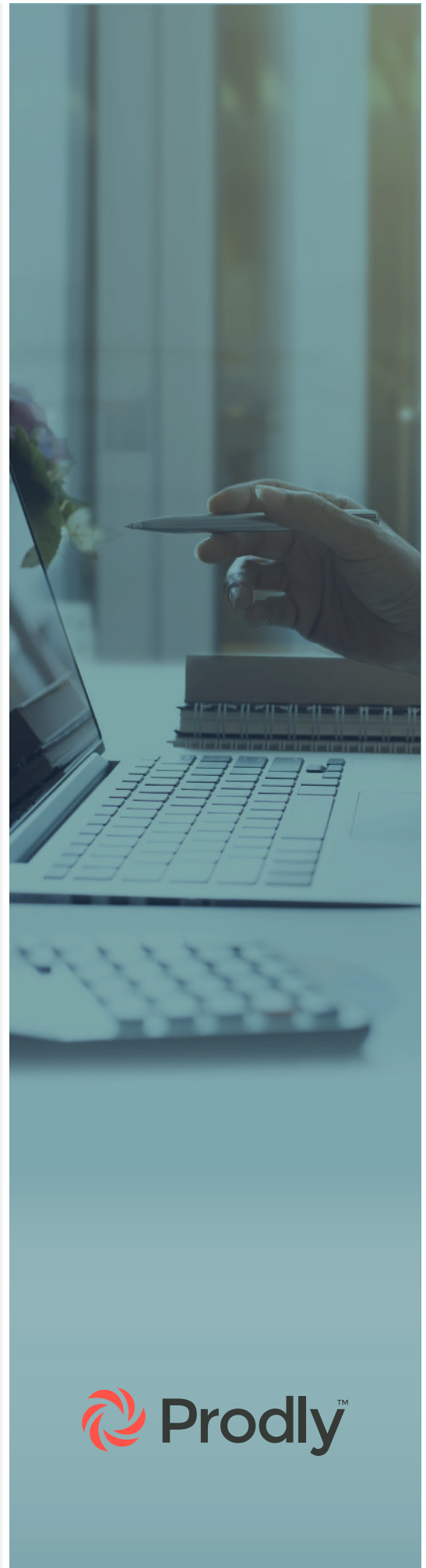
Yet when you have an automated sandbox seeding tool like Prodlly Sandbox Management, the payoff is tremendous.

This Essential Guide discusses everything you need to know about sandbox seeding in Salesforce. You can read it sequentially. You can also use the interactive Table of Contents to jump right to the section that interests you.

In this guide, we discuss what sandbox seeding in Salesforce is, why it's important, and what its technical benefits are. Plus, we take a look at the costs of not seeding Salesforce sandboxes. And we help you build a business case for implementing automated sandbox seeding in your company.

We take a deep dive into some considerations to keep in mind when selecting a data seeding vendor. We also discuss the problems with legacy tools for Salesforce data seeding.

Then we explain how you can seed sandboxes faster and cost-effectively with Prodlly Sandbox Management.



Part I: Basics of Sandbox Seeding

What Is Salesforce Sandbox Seeding? What Is Data Seeding?

Sandbox seeding is also referred to as “data seeding.” It involves populating a Salesforce sandbox or org with a copy of data that corresponds closely to the data in your production environment. In fact, in many, but not all, cases, the source environment is production.

Note that despite the word “sandbox” in the term, sandbox seeding also applies to scratch orgs and Salesforce training environments.

Sandbox seeding makes your Developer, Developer Pro, and scratch orgs infinitely more useful for development. It basically gives you many of the advantages of a Full Copy or Partial Copy sandbox without the cost or refresh limitations.

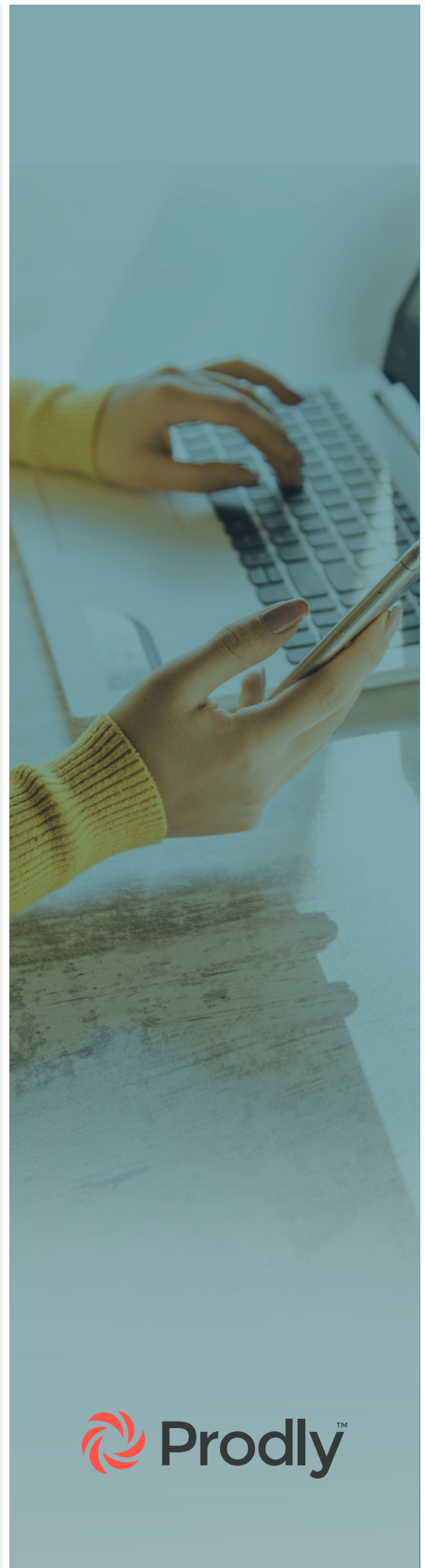
Why Is Data Seeding in Salesforce Important?

Sandbox seeding is the all-important first step in any DevOps journey. Why? Because CI/CD relies on having on-demand, reproducible environments. And because Salesforce doesn’t provide them out of the box, you have to create them yourself.

With sandbox seeding, you can copy data from your production environment into a Developer sandbox or scratch org. That way, it’s basically a mini-version of production.

But that’s not the only reason data seeding in Salesforce is so valuable. Sandbox seeding can be used at all points of the development process to make a sandbox more closely reflect your production environment.

Developing against a true replica of production enables you to complete projects faster because it removes a lot of the guesswork. You can identify issues and unforeseen behavior earlier on, when problems are easier and cheaper to fix. This reduces the amount of time you spend resolving bugs at all stages of development.



Part II: The Technical Benefits of Automated Sandbox Seeding in Salesforce

Sandbox seeding automation offers many technical benefits.

Selectively Sync Full and Partial Copy Sandboxes With Production Without a Refresh

Without data seeding, Full Copy and Partial Copy sandboxes are far less valuable as the last QA or UAT stop in the release process. Why? Because your production environment keeps changing, so a Full or Partial Copy consistently becomes less of a reproduction.

Sandbox seeding lets you selectively seed in metadata changes any time you need them. That way, you don't have to overhaul each sandbox every time you want to refresh.

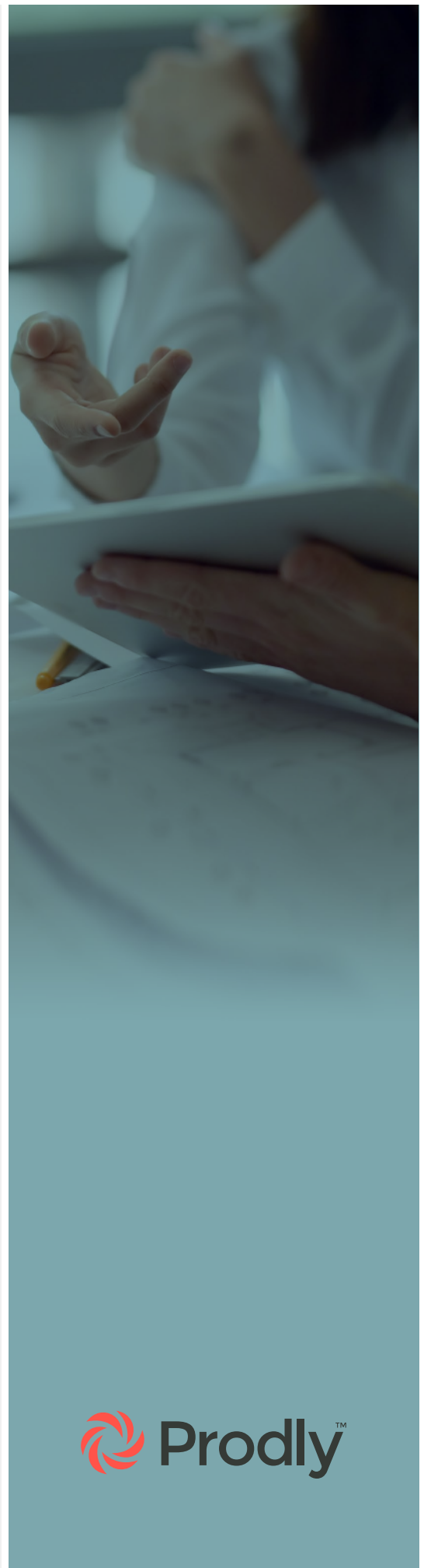
With traditional Salesforce sandbox refresh requirements, refreshes rarely occur conveniently. So when you have the ability to do mini-refreshes at will, it significantly enhances your release process. As a result, you can more effectively leverage higher-level environments to drive your release process.

Unlock the Potential of Developer, DevPro, and Scratch Orgs

Data seeding lets you maximize your Developer, Developer Pro, and scratch orgs as true development proving grounds.

When your lower-level orgs function as ready-made playgrounds, you can tinker with your ideas before pushing any changes up the release pipeline. If you start your projects with data seeding in Salesforce, you can continuously synchronize configuration changes across all your sandboxes.

As a result, you'll never face confusion and frustration about your changes working in your DevPro sandbox... but not in UAT.



Use Developer Sandboxes Like Full Copies

You can work in your Developer sandbox with all the data you need while your team still performs work in your Full Copy sandbox. Think about it: Do you really need 100,000 account records to test with, or will 100 be more than enough for unit testing?

Streamline Your Release Process to Catch Issues Earlier and Save Time

With sandboxes that you can seed and refresh on the fly, you can move faster and test earlier on in the release process. How often have you generated sample records one by one? Only to later run into problems because the data isn't representative of your production environment?

Typically, manually created test data misses all the nuance of your production environment. For example, you might have multiple different Account record types. Those types drive different layouts, flows, validations, and more because you have different needs for prospects, customers, and if applicable, partners.

Jump Start New Work

WITH AN AUTOMATED SANDBOX SEEDING TOOL LIKE PRODLY'S SANDBOX SEEDING WIZARD, IT'S QUICK AND EASY TO PROVISION UP TO FIVE SANDBOXES IN SALESFORCE IN ONE GO. THAT MEANS YOU CAN CREATE FIVE DEVELOPMENT-READY ENVIRONMENTS WITH RECORDS AND COMPLEX DATA RELATIONSHIPS IN JUST FOUR CLICKS!

Prodly also provides prebuilt data sets that allow you to quickly provision an org with commonly-used applications and use cases without having to lift a finger.

Because this streamlined release process lets you save time, you have more time to test. That in turn improves the quality of your work.



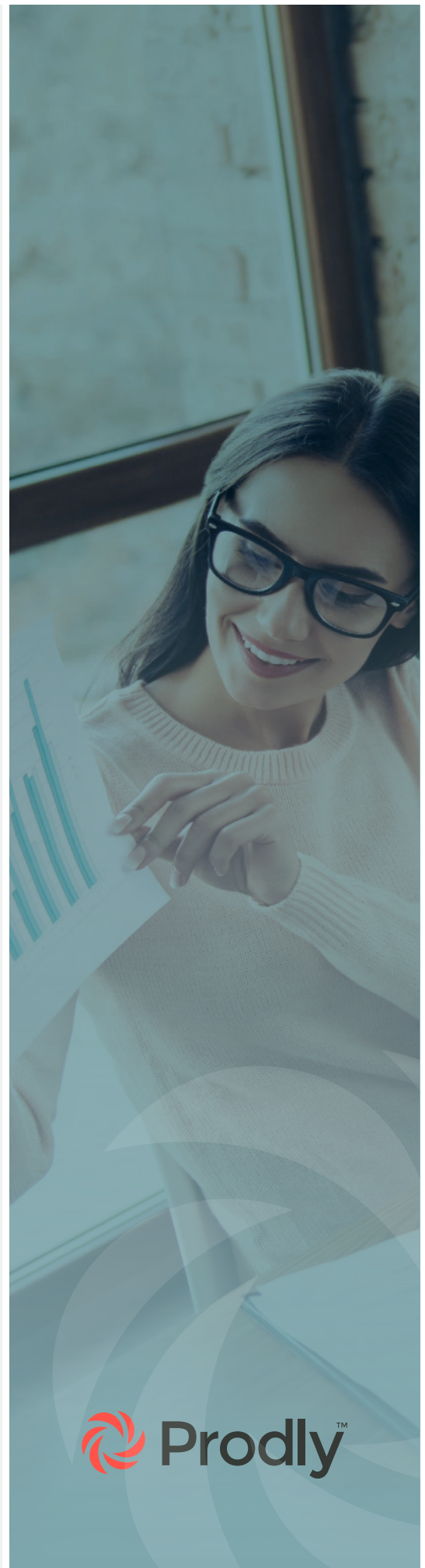
Quickly Create a Hotfix Environment With Sandbox Seeding

Sometimes you need to quickly fix a bug in Salesforce that's affecting a mission-critical business process. Of course, you should never do this in production in case you make it worse.

Instead, leverage sandbox seeding to quickly spin up a Salesforce org and populate it with the data you need to fix the issue. [Use best practices for making hotfixes in Salesforce](#), and simply promote the patch back to production.

Ship Enhancements to Users Faster

When you can quickly populate your sandbox with real test data and get to work, it's one less roadblock to deal with. This helps resuscitate any lagging business processes. Plus, it ensures you can get new features to end users faster. And isn't that what it's all about?



Part III: The Costs of Not Seeding Salesforce Sandboxes

Can Failing to Seed Sandboxes Hurt Your Salesforce Change Management Process?

Now you know the technical benefits of sandbox seeding, what are the costs of not doing it?

The first problem is that when multiple team members share sandboxes, they often step on each other's toes. It's all too common for them to run into conflicts when building features. Sometimes, they may even accidentally overwrite each other's work.

In contrast, with sandbox seeding, you can provide every team member with their own environment.

Secondly, even if you set aside Salesforce's time limitations for refreshing sandboxes, sandbox refreshes are massively disruptive to the development process. They wipe out all in-flight work. That means you must find the exact right time to refresh to avoid losing any work that isn't ready for production. If you're sharing development sandboxes, this problem is compounded even further.

SANDBOX SEEDING LETS YOU REFRESH YOUR ENVIRONMENTS AS FREQUENTLY AS YOU LIKE. YOU CAN KEEP UPPER BUILDING, TESTING, UAT AND STAGING ENVIRONMENTS MORE LIKE TRUE REPRODUCTIONS OF YOUR PRODUCTION ENVIRONMENTS.

Last, without sandbox seeding, many teams delay complete testing until late in the development cycle. At this point, it's much more expensive to fix issues. You're more likely to run into the question, "It worked in the sandbox, so why doesn't it work in production?" This problem is often caused by failing to use real test data in the building and testing phases.

With sandbox seeding, you can create rich, up-to-date development and testing environments that are representative of your production environment.



Part IV: Build a Business Case for Automated Sandbox Seeding

Now you have an understanding of the technical benefits of sandbox seeding, as well as the costs of not seeding sandboxes. But how do you make a business case for automated sandbox seeding to take to your decision makers?

An automated sandbox seeding solution offers the following business benefits:

Accelerate the Pace of Salesforce Innovation Without Sacrificing Trust

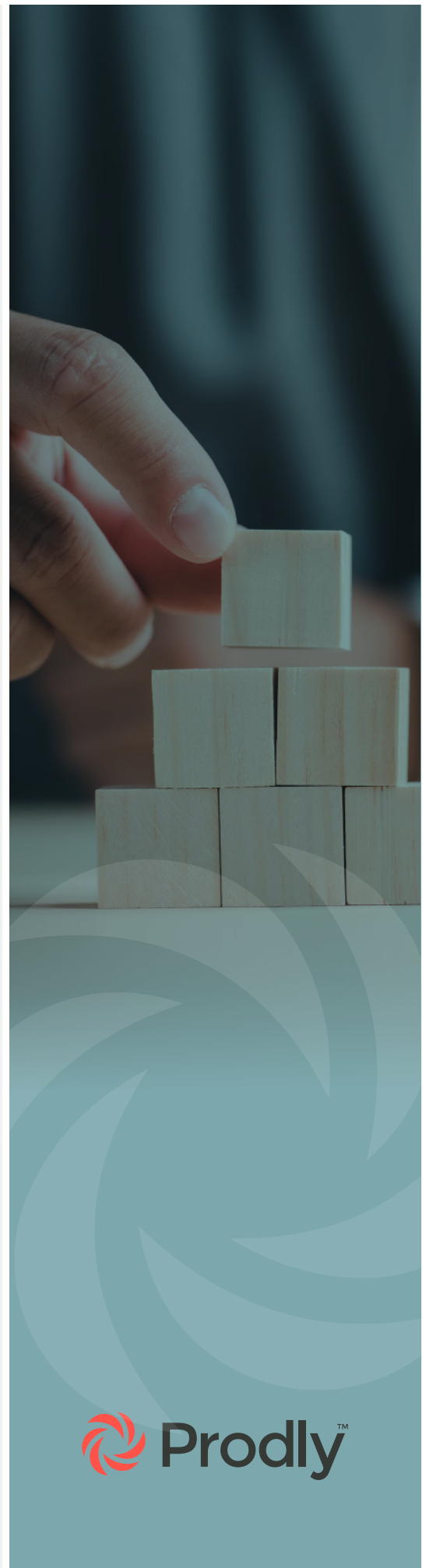
With a streamlined release pipeline, you can innovate faster. And because you're not building any changes or new solutions in your production environment, you won't break anything. This is critical to maintaining trust with your business users.

Save Money on Full Copy Sandboxes

With sandbox seeding, you can use Developer sandboxes like Full Copies. When you know that each Full Copy sandbox costs [30 percent](#) of your net spend, it's clear that you can save a significant amount of funds.

Improve Governance and Data Security

Sandbox management goes beyond just seeding. It lets you control who can deploy what data to which environments, which improves governance. In addition, because you don't need CSVs on your desktop and can anonymize sensitive data during deployment, you greatly enhance data security.



Increase Employee Productivity and Satisfaction

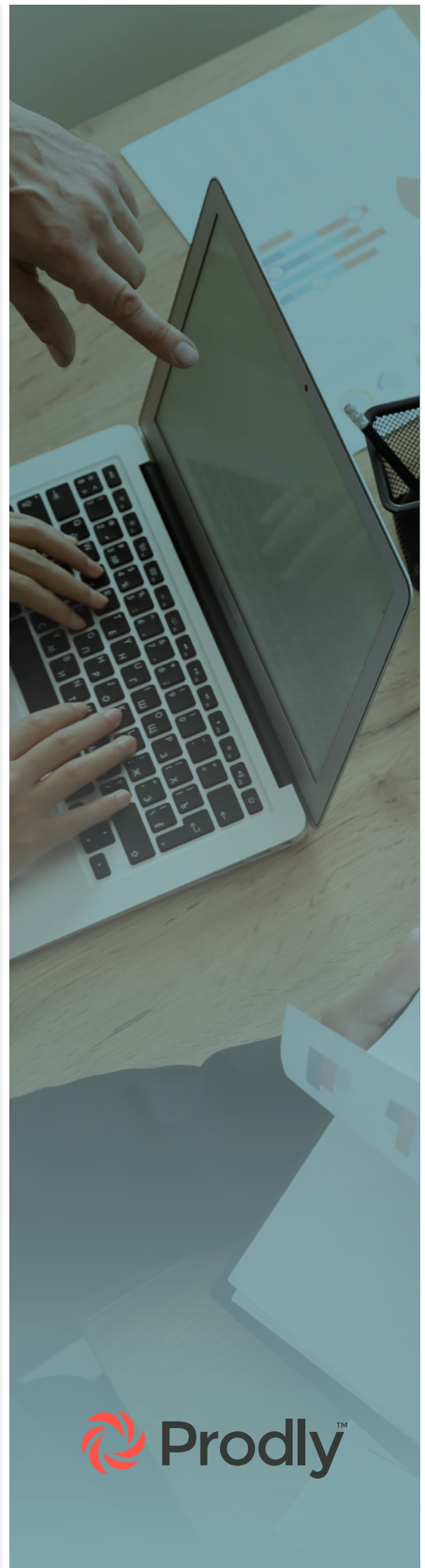
Employees are happier when they don't keep running into issues that slow them down and result in rework.

In fact, according to a [Salesforce survey](#), 89 percent of full-time workers are more satisfied thanks to automation. Moreover, an astounding 91 percent agree that automation saves them time and gives them a better work-life balance.

Decrease Time to Value of Your Salesforce Investment

With happier employees and faster, more streamlined release processes, you can increase productivity by as much as 80 percent. That means you start realizing the value of your Salesforce investment that much faster.

On top of that, you have more time to take care of the day-to-day business of managing your business. Plus, you can take on more projects and work through them more efficiently.



Part V: Considerations for Selecting a Vendor

As you've seen, seeding data helps accelerate Salesforce development cycles and increases testing throughput development. Additionally, it reduces the cost of bugs and ultimately enhances how you build new features and applications.

So it's worth choosing a robust automated sandbox seeding solution from a vendor that will provide you the ongoing support and upgrades you need. Here are some considerations to keep in mind.

Data Relationships

When you move a record from one environment to another, its ID changes. This makes it difficult to know that Contact Record 1 on Account X in production matches Contact Record 2 on Account Z in production. Most data seeding projects involve multiple related and unrelated Objects that must be populated in a specific order.

Ask yourself:

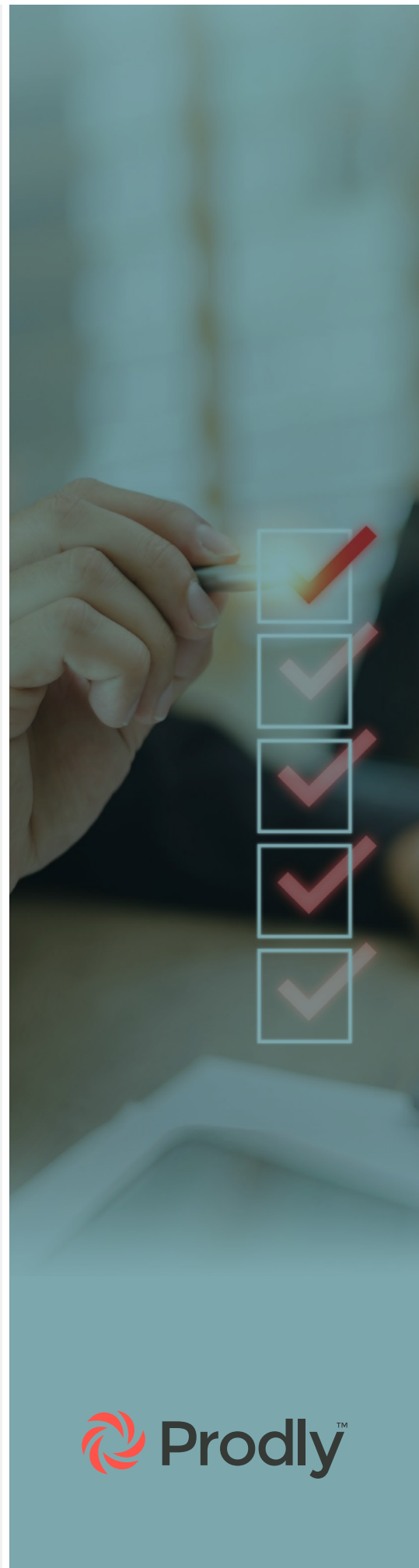
- Can the solution maintain parent-child relationships without requiring external IDs? And to how many levels?
- Will the solution automatically figure out the order to sequence objects?

Incremental Seeds and Duplicate Prevention

Let's say you have data in your sandbox that you don't want to—or can't—get rid of. Continuously updating a sandbox requires intelligent data matching to upsert records correctly and prevent duplicate records.

Find out:

- Can you incrementally seed a sandbox without creating duplicate records?
- Can you seed changes from not just production but also other orgs in your release pipeline?



Repeatability and Scale

You'll often want to re-seed the same standard test data into every new sandbox and as sandboxes are refreshed. Project-specific seed data should also be deployed to every environment in the release path for consistent testing. There's also a good chance that someone else on the team is trying to achieve similar seeding results.

Determine:

- Can you create reusable templates for common seeding needs?
 - Does the vendor have pre-built template for seeding?
-

Data Security

Oftentimes, you need to take additional steps to ensure the safe use of your data. This is especially true if you're seeding sandboxes with sensitive data.

At a minimum you need to consider permissions. To successfully seed data, you must have visibility to the source data and create/edit access in the sandbox.

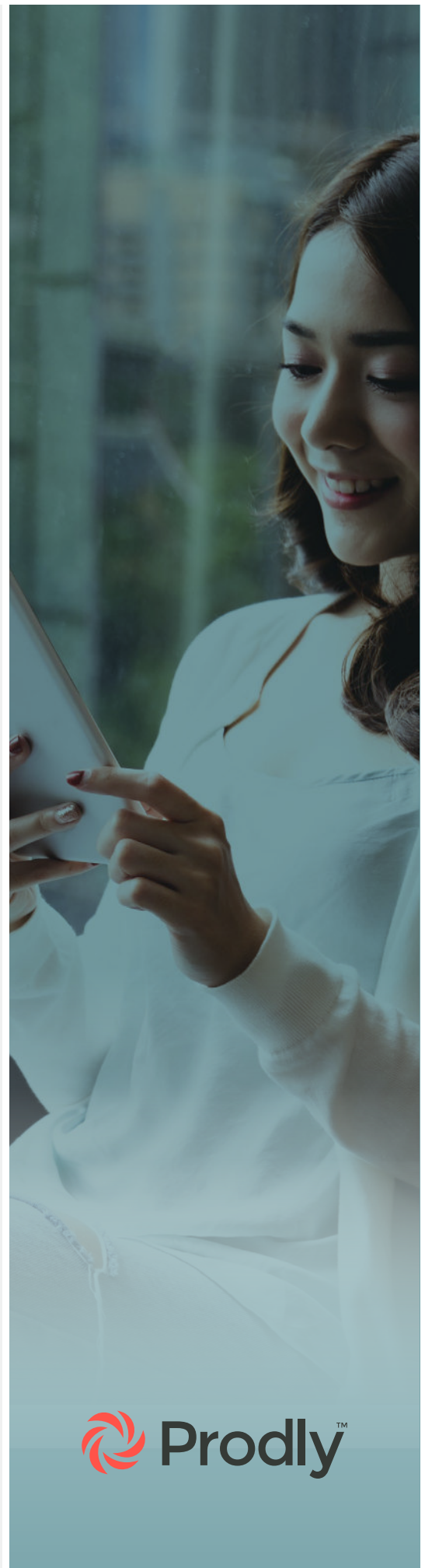
Ask yourself:

- Can you mask sensitive data?
 - Can you control who has access to seed certain environments?
 - Is data processed securely?
-

Org Automations

Before seeding a sandbox, make sure to deactivate automations like triggers, validation rules and flows. They may cause Salesforce to reject records unnecessarily.

It's also wise to append email addresses with "invalid" or setting them to empty. This prevents any emails from reaching a real customer inbox if they're triggered from a sandbox or scratch org. If the project involves sending emails, consider setting all emails in your data set to a predetermined testing address.



Determine:

- Can the vendor temporarily deactivate automations during seeding and then turn them back on?
 - Can you pre/post fix field values?
 - Can you deploy a set field value for testing?
-

Ease of Use

Select a sandbox seeding solution that offers ease of use so that both your programmatic and declarative developers can leverage it during their normal workflow. By offering your team a tool that takes the complexity out of data seeding in Salesforce, you can unburden your technical employees and empower your admins to do it, instead.

Find out:

- How intuitive is the user experience for seeding?
 - Can you seed from a point-and-click UI as well as Salesforce DX?
-

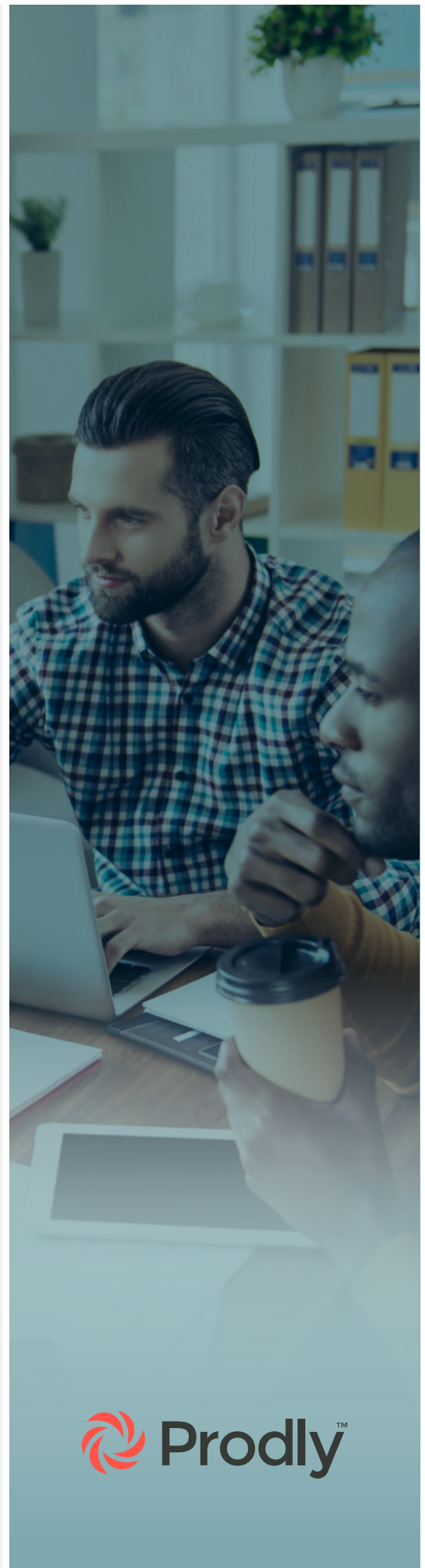
Closing the Loop on Release Management Automation

It's helpful to select a sandbox seeding solution that allows you to promote changes back up the release pipeline and close the loop on development. Remember: Seeding is only the first step to streamlining your release process.

The ability to effectively move data up, down, and to parallel orgs greatly increases development speed. It helps fight errors and increases efficiency by keeping all your development environments in sync with production. It also keeps them in sync with work occurring in parallel development tracks.

When selecting a tool, ask:

- Can you use it to seed between parallel orgs?
- Can the same tool manage promoting changes to production?



Part VI: The Value of Using Prodlly to Seed Sandboxes

Problems With Legacy Tools for Salesforce Data Seeding

Legacy tools such as Data Loader and Excel usually make Salesforce data seeding a painstaking, labor-intensive, unsecure, and time-consuming task. And which Salesforce team isn't more than familiar with the headaches change sets can cause? This is especially true if you're working on a large project.

You need to make sure the team member who's managing data seeding understands everything from data schemas and record matching to data obfuscation. You also need to confirm they're informed about data access permissions.

To ensure the best testing possible, that team member must seed every sandbox in your release pipeline. This might have to happen multiple times throughout a sprint.

Considering these challenges, some companies even employ a third-party developer to manage their orgs. This can become quite costly.

Seed Sandboxes Faster and Cost-Effectively With Prodlly

[Prodlly Sandbox Management](#) offers a faster, more cost-effective, and more reliable way to seed Salesforce sandboxes with data.

YOU CAN SEED UP TO FIVE FULL COPY, PARTIAL COPY, DEVELOPER, OR DEVELOPER PRO SANDBOXES, AS WELL AS SCRATCH ORGS WITH CURRENT PRODUCTION DATA. AND YOU CAN DO THIS IN THE SAME TIME IT WOULD TAKE TO SEED A SINGLE OBJECT WITH A DIFFERENT TOOL.

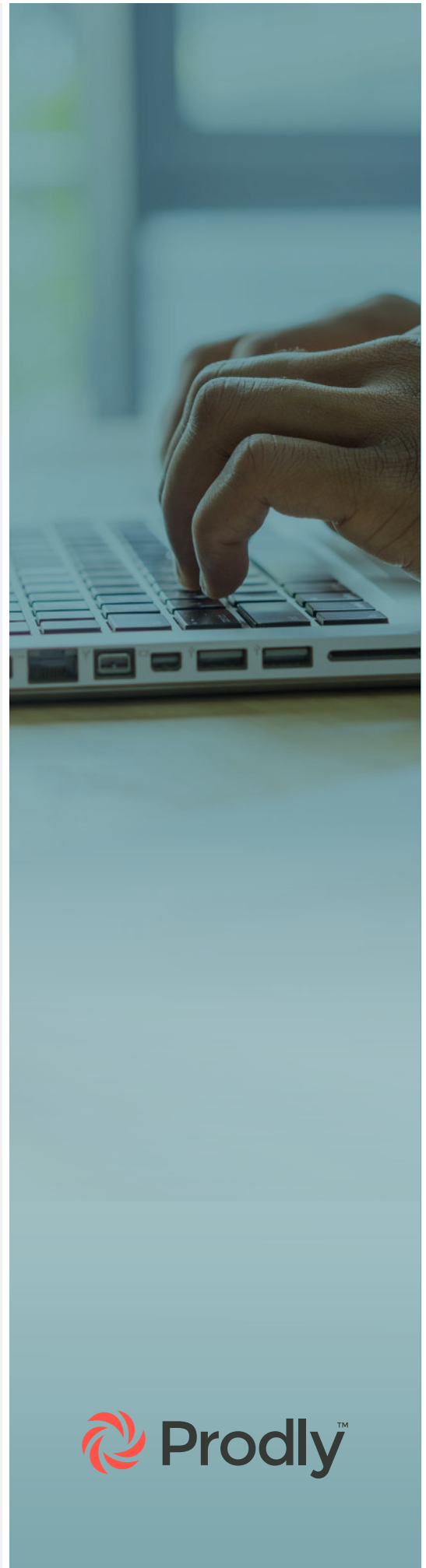


You can literally get started on your next task within minutes. This considerably accelerates your agility and velocity.

The Benefits of Prodlly Sandbox Seeding

There are many significant benefits to Prodlly Sandbox Seeding. You can:

- Deploy entire complex, relational data schemas at once. Prodlly automatically deploys the objects sequentially and maintains relationships between records.
- Automatically prevent duplicate records.
- Seed up to five orgs simultaneously—with just four clicks.
- Create and seed a new scratch org in one click!
- Automatically disable and re-enable org automations during seeding.
- Control exactly data is seeded.
- Implement the desired data security with robust options for masking, appending, and/or default values.
- Create and share reusable seeding templates that can easily be re-run by any user, regardless of their technical skill level.



Part VII: Sandbox Seeding: The Key to Maximizing Salesforce ROI

Accelerate Change Management in Salesforce

With Prodlly Sandbox Management, your whole team can get started on your new Salesforce project faster and experience fewer surprises. That means you can avoid many of the bottlenecks of a traditional release process. You can accelerate your change management, plus, you can empower your admins and users to deliver greater business agility than ever.

[See Prodlly Sandbox Management in action—contact us to request a personalized demo!](#)

