

Test in a Sandbox Environment Before Installing in Production

Bombora Company Surge® for Salesforce 2.0

If your company has access to a Salesforce Sandbox environment, you are welcome to install and test the package alongside the legacy app and identify any workflows or dependencies that will need to be addressed before deploying the new package to production.

Note that any settings or customizations you build and test in a sandbox will not be migrated into your production environment. The use of a sandbox is for testing and training purposes outside of your production environment.

Once you are comfortable with the new experience, we recommend that you un-install the legacy app before installing the new app in your production environment.

Quick Steps for Migration using a Sandbox:

1. Install the new Company Surge® for Salesforce 2.0 application in your sandbox environment using these instructions.
 - Within the sandbox environment, recreate and test any dependent or custom fields that you use with the legacy application in your production environment.
 - Leave the sandbox installed as you move to the next steps.
2. Once you are satisfied with the new experience you built in the sandbox, uninstall the legacy application from your production environment using these instructions.
3. Prior to installing the package in your production org, please communicate to your CSM that you are done with sandbox testing and ready to move to production.
4. Lastly, install the new Company Surge® for Salesforce 2.0 application in your production environment using these instructions.

For more information, please see helpful resources here. Or reach out to your Customer Success Manager.