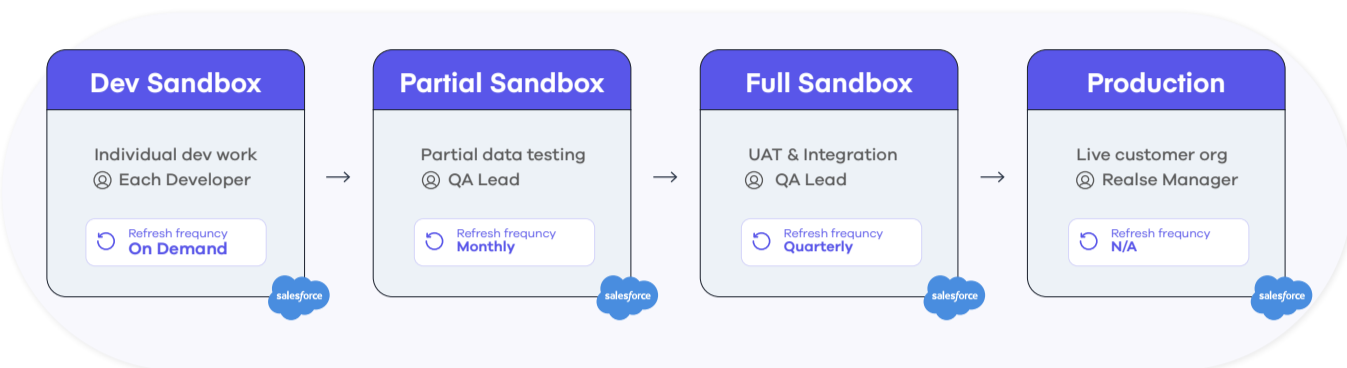# salto

Salesforce Org Refresh Process

Use this doc to keep all our Salesforce orgs aligned.
Update it whenever we change the refresh flow, automate new tasks,
or shift responsibilities.
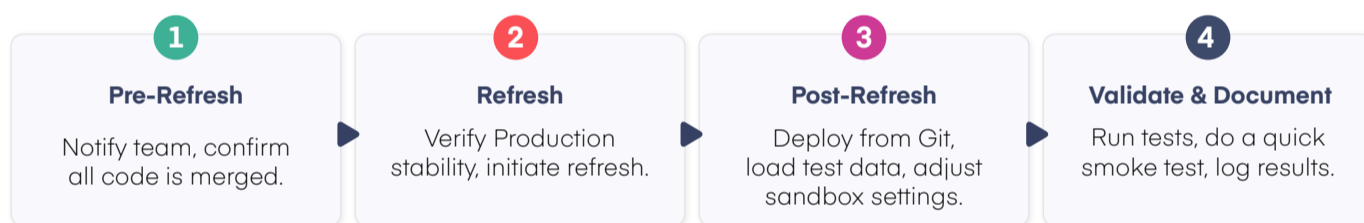
Org Overview & Owners

Dev Sandbox	Partial Sandbox	Full Sandbox	Production
Individual dev work @ Each Developer	Partial data testing @ QA Lead	UAT & Integration @ QA Lead	Live customer org @ Realse Manager
Refresh frequncy **On Demand**	Refresh frequncy **Monthly**	Refresh frequncy **Quarterly**	Refresh frequncy **N/A**

Responsibilities

Scheduling & Coordination	Merging & Final Approvals	Testing & QA	Org Maintenance	Product Acceptance & Sign-Off
Release Manager	Release Manager	QA Lead	QA Lead, Devs	Product Owner

Refresh Process

Steps (High-Level)

1 Pre-Refresh	**2** Refresh	**3** Post-Refresh	**4** Validate & Document
Notify team, confirm all code is merged.	Verify Production stability, initiate refresh.	Deploy from Git, load test data, adjust sandbox settings.	Run tests, do a quick smoke test, log results.

Automation & Ownership

Step	Owner	Automation Level	Typical Time
Notify Team	Release Manager	Manual	~5 min
Check/Merge In-Flight Work	Devs	Manual	Varies
Verify Production Stability	Release Manager	Manual	5 min
Initiate Sandbox Refresh	QA Lead	Manual (Salesforce process)	Hours
Deploy from Git (CumulusCI/Actions)	Devs/CI	Partially Automated	~30 min
Load/Create Test Data	QA Lead	Manual (CSV/script)	15 min
Adjust Validation Rules/Triggers	Release Manager	Manual, could be scripted	10 min
Run Automated Apex/UI Tests	QA Lead/CI	Fully Automated (CumulusCI/Robot)	20–30 min
Smoke Test & Spot Checks	Product Owner	Manual	15 min
Log Duration & Issues	Release Manager	Manual	5 min
Retrospective	Release Manager	Manual	10–15 min

Scheduling & Frequency

Weekly / Monthly / Quarterly
Depends on team velocity

Time of Day
Off-hours
(Friday night or weekend, if possible)

Communication
Slack or email with
a 24-hour heads up