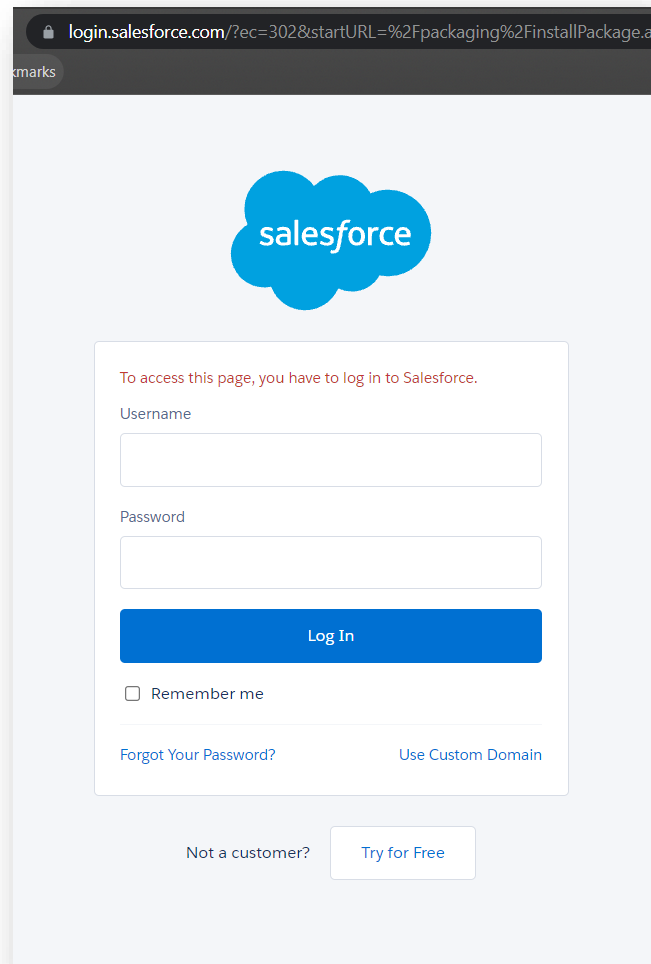


Sandbox Refresh Scheduler Setup Guide (Classic UI)

This guide is intended to help you install and configure the Bolt On Apps™ Sandbox Refresh Scheduler managed package into your Salesforce™ org. For any questions, please email support@boltonapps.com.

Step 1: Install the Package

- Begin by installing the managed package from our listing on the Salesforce™ [AppExchange](#).
- When you open this link, you will be taken to a Salesforce login screen. Please enter the credentials for the installing admin user in the org that you want to install the package in.



- Once your credentials have been accepted, you will be taken to the installation screen. Select the users that you would like to install this for (likely Admins only) and then click Install.



Install Sandbox Refresh Scheduler

By Bolt On Apps



☒ Install for Admins Only



☐ Install for All Users



☐ Install for Specific Profiles...

Install

Cancel

App Name	Publisher	Version Name	Version Number
Sandbox Refresh Scheduler	Bolt On Apps	ver 0.1	0.1

Additional Details

[View Components](#)

- The installation will begin. Wait until it completes and then proceed to the next step.



Install Sandbox Refresh Scheduler

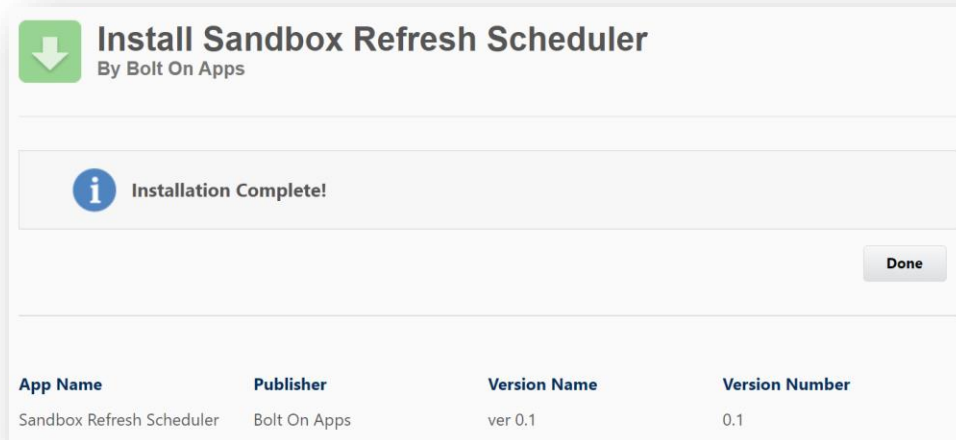
By Bolt On Apps

 **Installing and granting access to admins Only...**

App Name	Publisher	Version Name	Version Number
Sandbox Refresh Scheduler	Bolt On Apps	ver 0.1	0.1

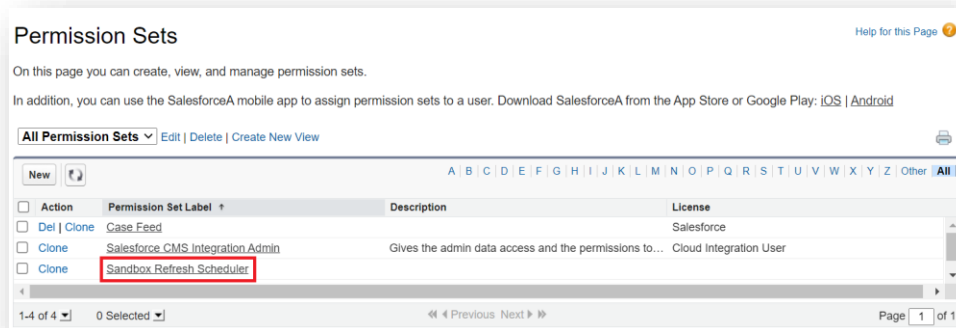
Additional Details

[View Components](#)



Step 2: Assign permissions

- Once the install has completed, you will need to assign the permission set to any users who will be using the tool. Click on your name in top right section of the screen and select Setup. Then on the left in the setup search box, type in Permission Sets and select Permission Sets. Once you are in the Permission Sets section of the setup menu, scroll down to the Sandbox Refresh Scheduler permission set and click on it.



- Once you are in the Sandbox Refresh Scheduler permission set, click on Manage Assignments, then Add Assignments.

Permission Set
Sandbox Refresh Scheduler [Video Tutorial | Help for this Page](#)

Find Settings... [Clone](#) [Manage Assignments](#)

Permission Set Overview

Description	API Name	Sandbox_Refresh_Scheduler
License	Namespace Prefix	BOA
Session Activation Required ☐	Created By	boa.admin, 1/16/2022, 11:02 PM
Last Modified By	boa.admin, 1/16/2022, 11:02 PM	

Assigned Users
Sandbox Refresh Scheduler [Help for this Page](#)

[Back to: Permission Set](#)

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other [All](#)

[Add Assignments](#) [Remove Assignments](#)

Full Name	Alias	Username	Last Login	Role	Active	Profile	Manager	Expires On
No records to display.								

[Add Assignments](#) [Remove Assignments](#)

- Check the box next to the users that you would like to assign the permission set to and click the Assign button.

Assign Users
All Users [Help for this Page](#)

View: [All Users](#) [Edit](#) [Create New View](#)

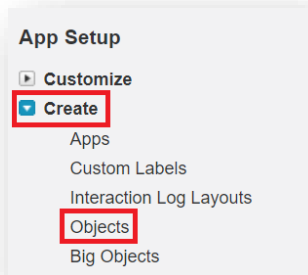
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other [All](#)

[Assign](#) [Cancel](#)

☐	Action	Full Name	Alias	Username	Email	Last Login	Role	Active	Profile
☒	Edit	admin_boa	badmi	boa.admin@boltonapps.com.boarsent10		1/16/2022, 10:55 PM	SVP Customer Experience	☒	System Administrator

Step 3: Assign Page Layouts

- Navigate back to the Setup menu and then select Create > Objects. Then search for and select the Sandbox Schedule object. Once on that object, scroll down to the Page Layouts section of the screen and then click the Page Layout Assignment button.



Custom Objects

[Help for this Page](#)

Custom objects are database tables that allow you to store data specific to your organization in Salesforce. You can use custom objects to extend Salesforce functionality or to build new application functionality.

Once you have created a custom object, you can create a custom tab, custom related lists, reports, and dashboards for users to interact with the custom object data. You can also access custom object data through the API.

New Custom Object Schema Builder					
Action	Label	Installed Package	Master Object	Deployed	Description
Edit Del New	Sandbox		Sandbox Schedule	✓	
Edit Del New	Sandbox Schedule			✓	

Page Layouts New Page Layout Assignment					
Action	Page Layout Name	Installed Package	Created By	Modified By	
Edit Del New	Day of Month Refresh Layout		boa.admin, 1/16/2022, 11:02 PM	boa.admin, 1/16/2022, 11:02 PM	
Edit Del New	Day of Week Refresh Layout		boa.admin, 1/16/2022, 11:02 PM	boa.admin, 1/16/2022, 11:02 PM	
Edit Del New	Day of Year Refresh Layout		boa.admin, 1/16/2022, 11:02 PM	boa.admin, 1/16/2022, 11:02 PM	
Edit Del New	One Time Refresh Layout		boa.admin, 1/16/2022, 11:02 PM	boa.admin, 1/16/2022, 11:02 PM	
Edit Del New	Sandbox Schedule Layout		boa.admin, 1/16/2022, 11:02 PM	boa.admin, 1/16/2022, 11:02 PM	

- Once you are on the page layout assignment page, assign each record type other than the master record type to its corresponding page layout for all profiles. You can leave the master record type alone as nobody should use that. Make sure to hit next at the top of the screen as there are more record types than can all be displayed on the first screen.

PLEASE NOTE: Using the incorrect page layout for a record type will expose fields that should not be used with that record type and will result in errors and unexpected results when setting up sandbox schedules. Please be sure to perform this step carefully!

Edit Page Layout Assignment Help for this Page

Sandbox Schedule

The table below shows the page layout assignments for different record type and profile combinations. Use SHIFT + click or click and drag to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent. Then choose a new page layout from the dropdown.

Save Cancel

Page Layout To Use: Day of Year Refresh Layout 11 Selected 22 Changed

Profiles	Record Types			
	Master	Day of Month Refresh	Day of Week Refresh	Day of Year Refresh
Chatter External User	Day of Month Refresh Layout	Day of Month Refresh Layout	Day of Week Refresh Layout	Day of Year Refresh Layout
Chatter Free User	Day of Month Refresh Layout	Day of Month Refresh Layout	Day of Week Refresh Layout	Day of Year Refresh Layout
Chatter Moderator User	Day of Month Refresh Layout	Day of Month Refresh Layout	Day of Week Refresh Layout	Day of Year Refresh Layout
Contract Manager	Day of Month Refresh Layout	Day of Month Refresh Layout	Day of Week Refresh Layout	Day of Year Refresh Layout
Identity User	Day of Month Refresh Layout	Day of Month Refresh Layout	Day of Week Refresh Layout	Day of Year Refresh Layout
Marketing User	Day of Month Refresh Layout	Day of Month Refresh Layout	Day of Week Refresh Layout	Day of Year Refresh Layout
Minimum Access - Salesforce	Day of Month Refresh Layout	Day of Month Refresh Layout	Day of Week Refresh Layout	Day of Year Refresh Layout
Read Only	Day of Month Refresh Layout	Day of Month Refresh Layout	Day of Week Refresh Layout	Day of Year Refresh Layout
Solution Manager	Day of Month Refresh Layout	Day of Month Refresh Layout	Day of Week Refresh Layout	Day of Year Refresh Layout
Standard User	Day of Month Refresh Layout	Day of Month Refresh Layout	Day of Week Refresh Layout	Day of Year Refresh Layout
System Administrator	Day of Month Refresh Layout	Day of Month Refresh Layout	Day of Week Refresh Layout	Day of Year Refresh Layout

(1-4 of 5) Next

Edit Page Layout Assignment Help for this Page

Sandbox Schedule

The table below shows the page layout assignments for different record type and profile combinations. Use SHIFT + click or click and drag to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent. Then choose a new page layout from the dropdown.

Save Cancel

Page Layout To Use: One Time Refresh Layout 11 Selected 33 Changed

Profiles	Record Types	
	One Time Refresh	
Chatter External User	One Time Refresh Layout	
Chatter Free User	One Time Refresh Layout	
Chatter Moderator User	One Time Refresh Layout	
Contract Manager	One Time Refresh Layout	
Identity User	One Time Refresh Layout	
Marketing User	One Time Refresh Layout	
Minimum Access - Salesforce	One Time Refresh Layout	
Read Only	One Time Refresh Layout	
Solution Manager	One Time Refresh Layout	
Standard User	One Time Refresh Layout	
System Administrator	One Time Refresh Layout	

<Prev (5-5 of 5)

- Once you have completed matching all of the record types with the page layouts of the corresponding name, click the Save button.

Congratulations! You have now completed the setup for Sandbox Refresh Scheduler. The tool should now be ready to use. For more information on how to use Sandbox Refresh Scheduler, please see the [Sandbox Refresh Scheduler User Guide](#). If you run into any issues or have further questions, please email support@boltonapps.com for help.