iHub - Sandbox refresh

During the Sandbox refresh process, all existing Clarizen Sandbox information relating to iHub is deleted and copied over by that from the Production environment.

The following information is overridden by the refresh process:

- ✅ **Linked accounts (Clarizen-SFDC/JIRA/Intacct)**
- ✅ **Mappings**
- ✅ **Events**
- ✅ **Synced objects information**
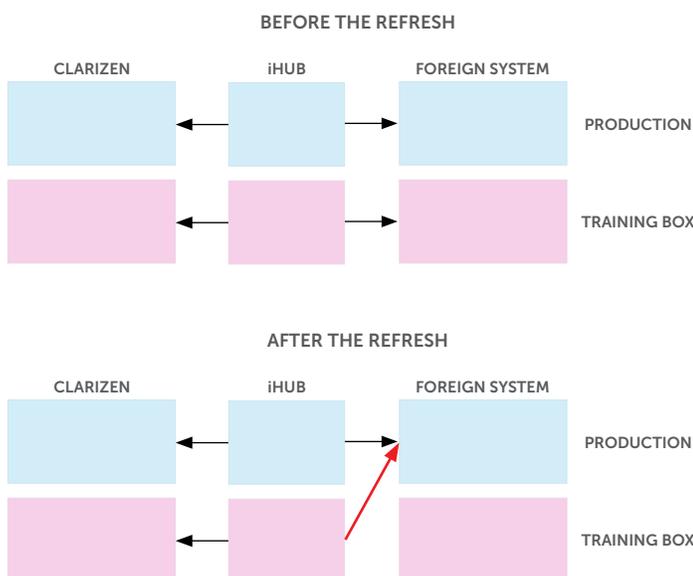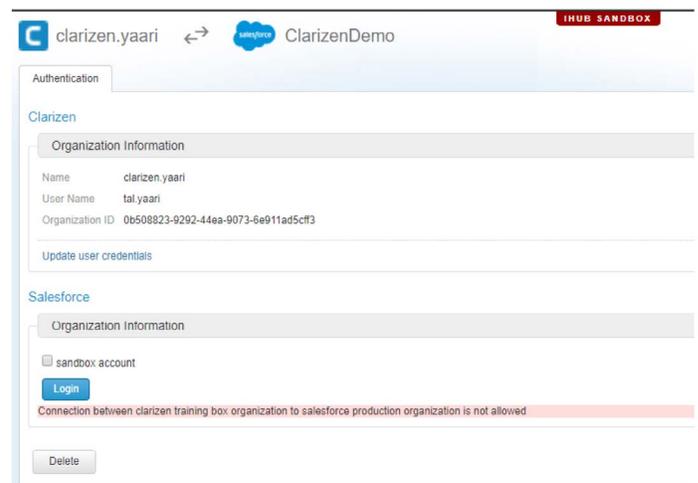- ✅ **Settings**

After Refresh, as Sandbox now reflects the Production settings, Sandbox iHub's "foreign system" (e.g. Salesforce, Jira, etc.) now points to Production account.

ACTION REQUIRED
After each refresh, Administrators should re-connect their Clarizen Sandbox Account to match the foreign system account.

BEFORE THE REFRESH

AFTER THE REFRESH

iHub Integrations are disabled during the Refresh process to prevent a situation in which Sandbox data could be unintentionally synced to a Production account.

For a secondary level of protection when using Clarizen-Salesforce integration, Clarizen Sandbox is blocked from connecting to Salesforce Production servers:

Mappings and events
You may be building a new integration process in Sandbox which you are not ready to deploy on Production, but don't want to have overwritten.
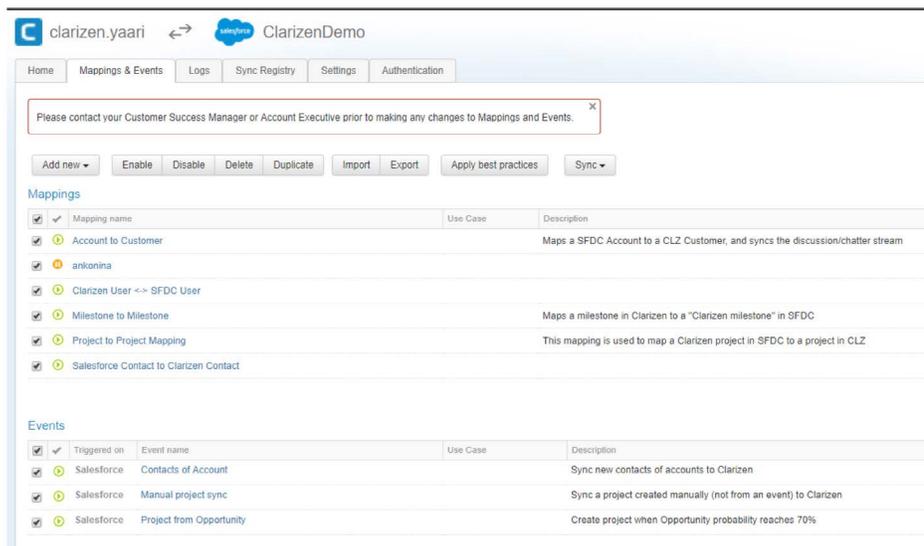
If your Sandbox settings differ from those in Production, and needs to be backed up before and restored after Sandbox Refresh, follow the instructions below.

Backing up & restoring mappings & events

To be able to restore the iHub configuration back to the point prior to the refresh, follow the following steps:

BEFORE REFRESH

1. Log in to your Clarizen Sandbox account
2. Go to: https://app.clarizentb.com/Clarizen/Pages/Admin/AdminIntegrations.aspx
3. Choose the open relevant integration (SFDC, Jira, Intacct)
4. Choose "Mappings & Events" tab
5. Mark all mappings and events and press the Export button
6. A JSON file will be created and downloaded to your local machine
7. Important Note: the Sandbox Refresh process does not delete or modify the foreign system triggers (Jira's Webhooks / SFDC Workflow Rules / Intacct smartrules) and they remain unaffected by iHub, but still will be triggered by foreign side. So, select all Events and press the Delete button.

AFTER REFRESH

1. Log in to your Clarizen Sandbox account
2. Go to: https://app.clarizentb.com/Clarizen/Pages/Admin/AdminIntegrations.aspx
3. Select the "Authentication" tab
4. Press the Delete button (will clear the Sync Registry information).
5. Connect the Clarizen account to the desired foreign system account
6. Select the "Mappings & Events" tab
7. [Optional] If not needed, delete all out of the box mapping and events
8. Press Import button and choose the JSON file that you exported before the refresh

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