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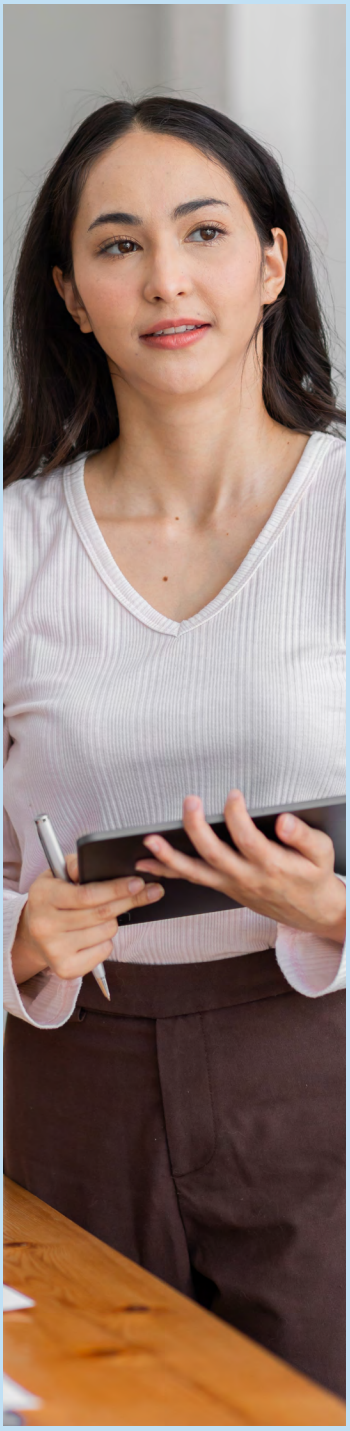

PLANNING FOR SALESFORCE INDUSTRIES AUTO UPGRADES

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Contents

1. Abstract 2
2. Overview and Benefits of Auto Upgrade 3
3. Playbook for Auto Upgrades 4
4. Challenges and considerations 6
5. Conclusion 7
6. References 7
7. Glossary 7
8. Acknowledgements 8
9. About the Author 8

Abstract

Historically, Salesforce-managed packages, such as Vlocity, have operated under a pull model. This approach allowed customers to upgrade at their own pace to leverage new features and enhancements. However, this has required managing multiple versions across client bases, adding complexity to the Salesforce ecosystem.

Recently, Salesforce Inc initiated a transformative shift by aligning industry-specific vertical solutions with Salesforce's thrice-yearly core upgrades. This strategic move transitions upgrades from a pull to a push model, where clients automatically receive the latest updates. This shift not only streamlines the adoption of new functionalities but also enhances productivity and synchronizes industry solutions with Salesforce's upgrade cadence.

In 2023, Salesforce introduced automatic upgrades for its Industries applications covering Insurance, Communications, Media, Energy, and OmniStudio managed packages for each seasonal release (Summer, Winter, and Spring). The upgrade dates for sandboxes and production for the industry clouds are based on the Salesforce release calendar, which is published one year in advance. Starting with the Summer '24 release (v250), all customers are required to receive automatic upgrades.

This paper outlines the methodology to ensure seamless auto upgrades for Salesforce industry cloud customers. Advance planning is crucial for customers to evaluate new features in upcoming releases, understand the impact of enforced changes, and establish timelines for testing the new features. Additionally, planning for BAU releases and hot-fix deployments during this window is essential. Effective and timely communication with business stakeholders about any observations or changes introduced with the upgrade is critical to the successful adoption of auto upgrades.

Overview and Benefits of Auto Upgrades

To qualify for automatic upgrades, customers must be on the latest package version (e.g., customers need to be on v250 to be able to auto-upgrade to v252). All sandboxes designated as preview will be upgraded 5-6 weeks prior to the GA date, allowing customers early access to upcoming release features. Sandboxes categorized as 'non preview' will be upgraded later with the production instance.

To determine your sandbox type (preview or non-preview), follow these steps in the Production org: Navigate to Setup, use the Quick Find box to search for 'Sandbox', and then select 'Sandbox'. Use the Release Type column to determine the instance type.

Clone | Log In |	DEV1SB	Developer Pro	Completed	Hyperforce	Non-Preview	00D86000000DAb3	7/5/2024, 7:35 pm

For the schedule of sandboxes and production instances, refer to the trust portal:

https://status.salesforce.com/instances/<instance>

Key benefits of automatic upgrades

01

Business: Always stay on the latest version to leverage new features and improvements automatically.

02

Operations: Eliminate manual effort involved in upgrading all the customer orgs, including pre- and post-install steps that are managed automatically.

03

Platform performance and security: Ensure environments are updated with the latest patch releases for enhanced performance, security, and stability.

Business benefit articulation

The value of automatic upgrades can be articulated across the following areas:

Operational efficiency: This can be calculated by observing the annual savings in effort required for manual upgrades:

- DevOps effort for manual upgrades x the number of organizations the client manages x the number of manual upgrades performed annually
- Savings in regression testing effort through automated test suites for each manual upgrade in a year

Platform and user experience improvements:

- Increased application availability during automated upgrades
- Number of new features and enhancements adopted

Playbook for Auto Upgrades

Customers need to diligently plan well in advance to ensure their organizations undergo seamless automated upgrades without disrupting critical business operations. Infosys recommends a multi-pronged strategy to ensure customer success on the automated upgrade roadmap.

1) Process framework

A clear and well-defined framework is an essential component of the planning process to ensure alignments among all stakeholders regarding their responsibilities and expected outcomes. It is imperative that customers, the ISV (Salesforce) and systems integration (SI) partners (such as Infosys) adhere to this framework. The recommended framework includes the following key steps:

Fig 1 – Process framework for auto upgrade

Key Phases	Description	Timing	Suggested Owners
SF Release: Readiness Notification	Notification of the release process, release notes, testing timelines, and impact assessment for clients	- 6 weeks	SF Signature Success, Infosys (SI)
SF Release: Readiness Assessment	Impact assessment and prioritized features most relevant for client adoption	- 4 weeks	SF Signature Success
SF Release: Impact Assessment	Presentation of impact assessment by SI to client team to implement the required system changes before GA	+ 2 weeks	Infosys (SI)
GA Feature Review and Demo	Review of features most relevant for client adoption with current licenses	+ 2 weeks	SF Signature Success
Recommended Features and Adoption	Presentation of relevant recommended features available with current licenses to HoDs	+ 3 weeks	Infosys (SI)
New Opportunities	Presentation of new relevant and complementary capabilities for clients outside of current licensing.	+ 3 weeks	SF Signature Success

Prepare a 'Release Readiness Timeline' by mapping key tasks to the relevant dates. Below is a sample mapping of tasks with dates for the v250 auto upgrade.

Salesforce Release Readiness Timeline													
		Year	2024										
		Week	17	18	19	20	21	22	23	24	25	26	27	28
Event	Occassion	Date	4/22	4/29	5/6	5/13	5/20	5/27	6/3	6/10	6/17	6/24	7/1	7/8
Notificatior	SF Release Readiness Notification v250	April 22nd												
Meeting	SF Release Readiness Assessment v250	May 6th												
Release	Comms Cloud Sandbox Preview v250	May 10th												
Testing	Regression Testing	May 13th												
Analysis	SF Release: Impact Assessment v250	May 21st												
Release	**SF Comms Cloud Release v250**	*June 15th*								X				
Meeting	SF Release: GA Feature Review & Demo v250	June 24th												
Analysis	SF Release: Recommended features for adoption v250	July 1st												
Meeting	SF Release: New Opportunity v250	July 1st												

Fig 2: Sample timeline of tasks to auto-upgrade to v250 (for illustrative purposes only)

2) Environment and release planning

The default sandbox release type is preview. We recommend that customers utilize an integrated full copy or partial copy sandbox of the preview type to test new features and enforced changes. It is further advisable to have the environments for hot fixes and PLM deployments as non-preview so that they match the Production org version.

In cases where all customer sandboxes are of preview-type, those used by the customer for release deployments during the preview window must be identified and converted to non-preview. This requires raising a Salesforce case for approval, creating of a routing rule for release type change by engineers, and subsequent sandbox cloning by the DevOps team. This one-time activity also applies to environments with frequent releases such as PLM and hotfixes.

For customers on v240 or prior, manual upgrade to the latest version involves two hops from a DevOps perspective:

- v240 -> v242 -> v250 (or whatever latest version is available) -> Testing

The upgrade path should be validated with Salesforce during the planning phase. The post-installation tasks for each version should be carried out. For example, while manually upgrading from v240 to v250 the post-installation tasks should be carried out for v242, v244, v246, v248 and v250.

3) Build strategy

Based on impact assessment, any development work or unit testing required to address enforced changes or new features must be completed before automated upgrade regression testing. It is recommended to enable new features relevant to the client post-upgrade as part of future releases to ensure existing functionality remains unaffected.

4) Testing strategy

Managed package installations cannot be rolled back, making thorough regression testing critical. This should be conducted in a full copy preview sandbox instance during the 5-week preview window. During this timeline, customers should plan to perform automated regression testing of all customizations and key features built on the Salesforce platform. This will ensure a seamless upgrade experience and minimize the need for additional manual testing efforts. It is also vital to execute the automated regression suite during the first 2 weeks of the preview window. This early testing helps identify defects and receive product bug fixes prior to the production upgrade, which will be automatically applied as patches to the sandboxes.

Challenges and Considerations

In the past, Salesforce upgrades required thorough review of release notes and impact assessments, with well-established enterprises often relying on automated regression test suites to mitigate risks during upgrades. With Salesforce Industry solutions now following auto-upgrade paths, while manual upgrade efforts are reduced, there is a strong need for disciplined release cadences. This shift encourages comprehensive testing of all functionalities three times a year to ensure smooth transitions during Salesforce upgrades.

- **Challenges in release management**

Many clients may prefer to delay adopting the latest releases due to ongoing delivery commitments and testing cycles. Balancing Salesforce's upgrade cycle with client delivery cycles in end-to-end enterprise release cadences poses a significant challenge for release management, especially for SME clients. Effective alignment of these cycles is crucial to minimize disruption and maintain operational efficiency.

- **Dependence on regression testing**

Although Salesforce promises backward compatibility with its automatic upgrades, there is no guarantee of 100% compatibility. This necessitates a rigorous regression testing process to mitigate the risks of potential disruptions to processes and workflows, ensuring systems continue to function as intended post upgrade. Clients lacking robust regression testing suites are now compelled to develop and maintain them.

- **Reduction in support for older releases**

Salesforce's policy of ending support for releases older than N-2 limits clients' flexibility in delaying upgrades. This policy allows for a maximum postponement of 1-2 quarters, forcing clients to align more closely with Salesforce's upgrade schedule, which may not always align with their operational needs.

Conclusion

Customers and partners can leverage the strategies outlined in this paper to assess the auto upgrade readiness of their Salesforce implementations and manage seasonal auto upgrades continuously. This assessment is crucial to ensure seamless BAU, adhere to the Salesforce auto upgrade release calendar, and maintain service support from Salesforce. With the introduction of the industry's auto-upgrade feature, customers can test both Salesforce core and industry features together during the same preview period. By adopting industry auto upgrades and leveraging automated regression suites, customers can significantly reduce operational costs and accelerate business benefits through timely productivity enhancements and the latest features.

In summary, while the Salesforce Industries' auto-upgrade offers these benefits, it also introduces challenges related to flexibility and organizational readiness. Customers must navigate these challenges to effectively leverage Salesforce's evolving ecosystem.

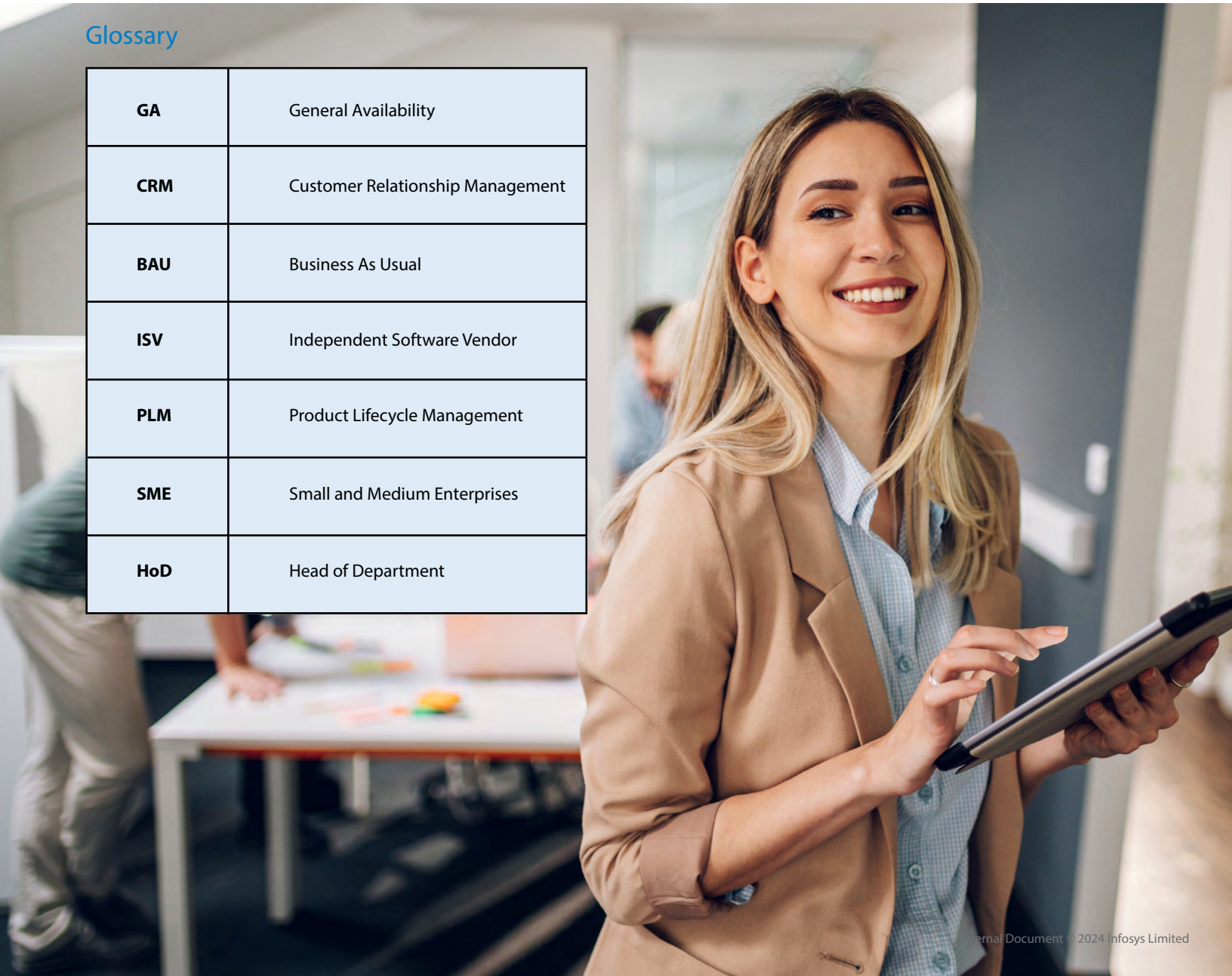
References

Salesforce Auto Upgrade - https://help.salesforce.com/s/articleView?id=000389239&type=1

Salesforce Sandbox Preview Instructions https://help.salesforce.com/s/articleView?id=000391927&type=1

Glossary

GA	General Availability
CRM	Customer Relationship Management
BAU	Business As Usual
ISV	Independent Software Vendor
PLM	Product Lifecycle Management
SME	Small and Medium Enterprises
HoD	Head of Department



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