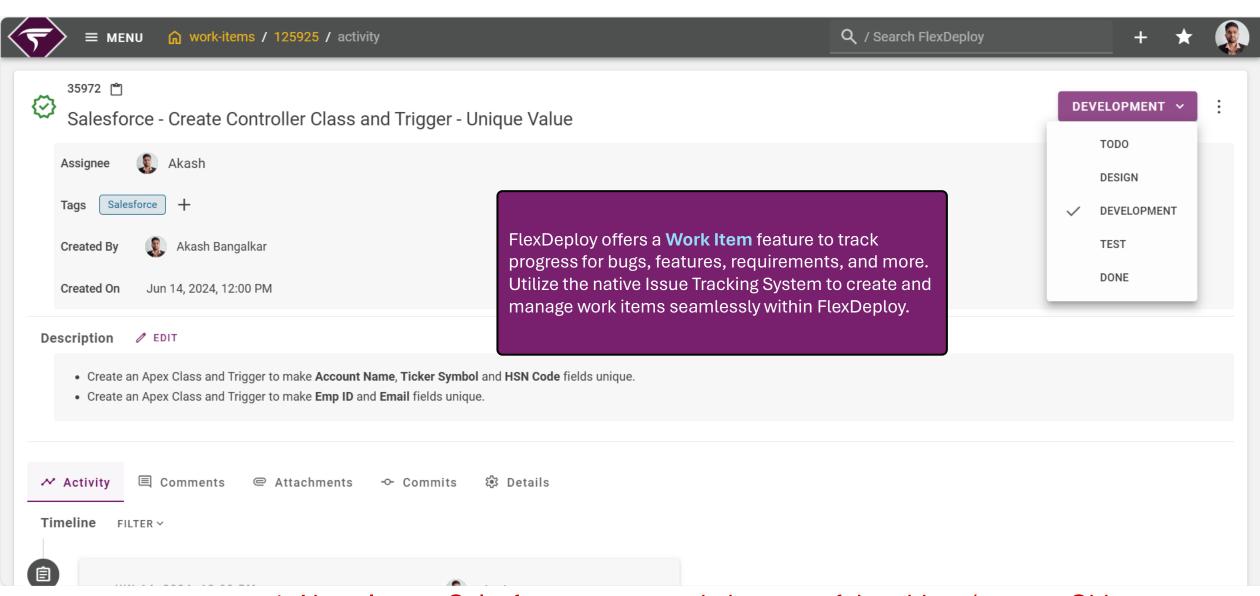# FlexDeploy for Salesforce

FlexDeploy provides comprehensive and flexible support for migrating and deploying customizations across Salesforce Orgs. As an enterprise DevOps platform, FlexDeploy features a rich pipeline and release automation capabilities, offering a complete DevOps solution tailored for Salesforce environments.

Why FlexDeploy?
- Accommodates No-Code, Low-Code, professional programming, and hybrid application development. Facilitates Org to Org and SCM to Org deployments.
- Supports data deployments and all metadata types across Salesforce Orgs.
- Automates continuous integration from Sandbox to Git repository and across Dev and Production Orgs. Fully compatible with Salesforce DX.
- Supports full and object-level comparisons with fully automated pipelines and release management.
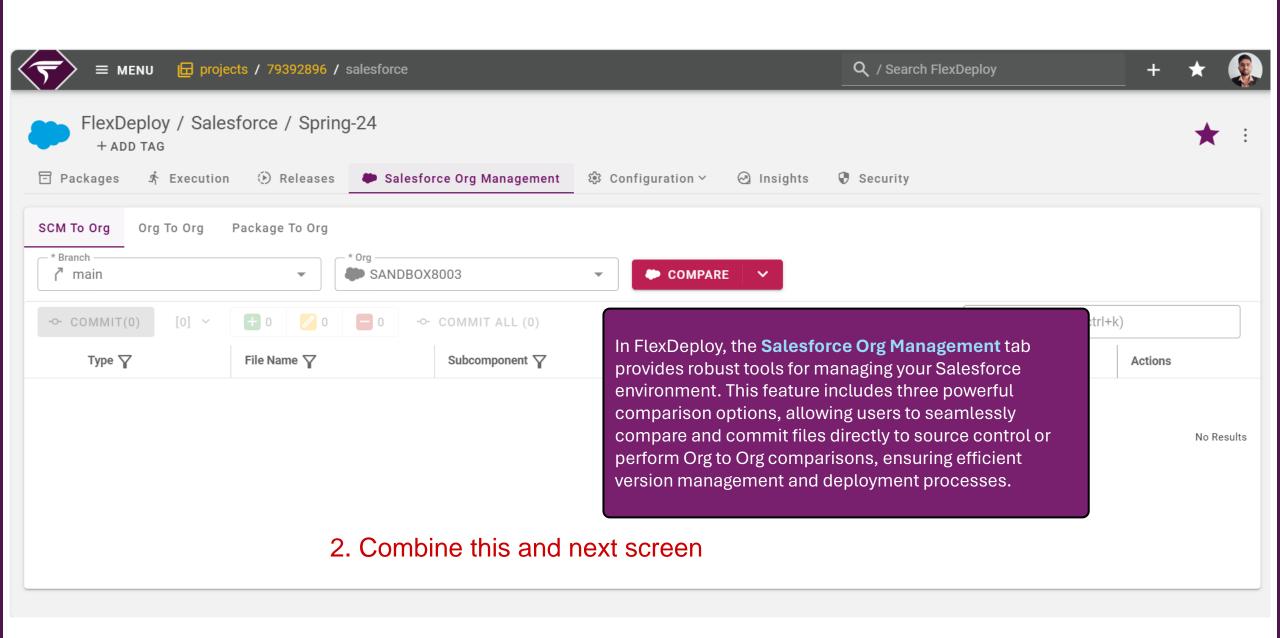
GET MORE
from DIGITAL.
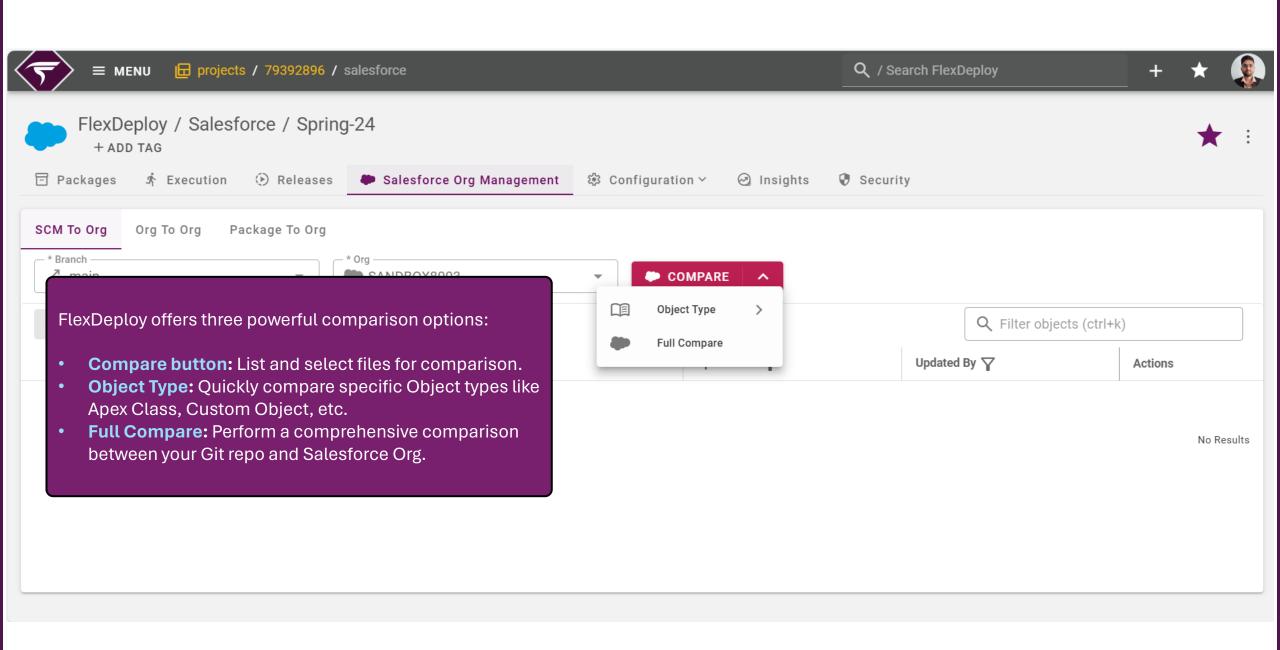
1. Next, Insert Salesforce screen updating one of the object (custom Object or Profile)

MENU projects / 79392896 / salesforce

FlexDeploy / Salesforce / Spring-24
+ ADD TAG

📦 Packages   🏃 Execution   ▶ Releases   ☁ **Salesforce Org Management**   ⚙ Configuration ⌄   📈 Insights   🛡 Security

SCM To Org   Org To Org   Package To Org

* Branch
↗ main

* Org
☁ SANDBOX8003

☁ COMPARE ⌄

○ COMMIT(0)   [0] ⌄   ➕ 0   ✏ 0   ➖ 0   ○ COMMIT ALL (0)   trl+k)

Type ▽	File Name ▽	Subcomponent ▽	Actions

No Results

In FlexDeploy, the **Salesforce Org Management** tab provides robust tools for managing your Salesforce environment. This feature includes three powerful comparison options, allowing users to seamlessly compare and commit files directly to source control or perform Org to Org comparisons, ensuring efficient version management and deployment processes.

2. Combine this and next screen

🔍 / Search FlexDeploy

FlexDeploy / Salesforce / Spring-24

+ ADD TAG

📋 Packages   🏃 Execution   ▶️ Releases   ☁️ **Salesforce Org Management**   ⚙️ Configuration ⌄   📈 Insights   🛡️ Security

SCM To Org   Org To Org   Package To Org

* Branch
main

* Org
SANDBOX8002

☁️ **COMPARE** ⌃

📖 Object Type   >

☁️ Full Compare

🔍 Filter objects (ctrl+k)

Updated By ▽

Actions

FlexDeploy offers three powerful comparison options:

• **Compare button:** List and select files for comparison.
• **Object Type:** Quickly compare specific Object types like Apex Class, Custom Object, etc.
• **Full Compare:** Perform a comprehensive comparison between your Git repo and Salesforce Org.

No Results

3. Combine this and next screen

FlexDeploy enables users to see the exact changes in the metadata files, detailing what changed, who made the change and when it occurred. Users can review each modification comprehensively.

Q / Search FlexDeploy

FlexDeploy / Salesforce / Spring-24

+ ADD TAG

- Packages
- Execution
- Releases
- Salesforce Org Management
- Configuration ⌄

Packages in FlexDeploy represent features, bug fixes, or other deliverables, containing lists of files for use during builds, deployments, and release definitions.

Status
(eq) ACTIVE 🗑

≡ 1

[0] ⌄

+ CREATE

⊞ FILE CATALOG

Package Name ⧩	Status ⧩	Description ⧩	Type ⧩	Updated On ⧩ ↓	Updated By ⧩	Actions
SFDC_24_Jun_13	⊙ Active		👤 User Managed	Jun 13, 2024, 5:40 PM	akash	⋮
SFDC_24_Jun_12	⊙ Active		👤 User Managed	Jun 13, 2024, 5:32 PM	akash	⋮
SFDC_24_Jun_11	⊙ Active		👤 User Managed	Jun 13, 2024, 5:32 PM	akash	⋮
SFDC_24_Jun_10	⊙ Active		👤 User Managed	Jun 13, 2024, 5:31 PM	akash	⋮
SFDC_24_Jun_09	⊙ Active		👤 User Managed	Jun 13, 2024, 5:31 PM	akash	⋮
SFDC_24_Jun_08	⊙ Active		👤 User Managed	Jun 13, 2024, 5:31 PM	akash	⋮

4. We can remove this screen.

Q / Search FlexDeploy

FlexDeploy / Salesforce / Spring-24

+ ADD TAG

Packages | Execution | Releases | Salesforce Org Management | Configuration ⌄ | Insights | Security

Package Execution | ✎ Package Files

[0] ⌄ | Q Search (ctrl+k) | + Add file ⌄ | CREATE | DEPENDENCY ⌄ | ⋮

⠿	1	/classes/AccountController.cls Apex Class	2024, 12:32 PM	akash	⋮
⠿	2	/classes/AccountController.cls-meta. Apex Class	2024, 12:51 PM	akash	⋮
⠿	3	/classes/ContactController.cls Apex Class	2024, 12:32 PM	akash	⋮
⠿	4	/classes/ContactController.cls-meta.x Apex Class	2024, 12:51 PM	akash	⋮
⠿	5	/triggers/AccTrigger.trigger Apex Trigger	2024, 12:32 PM	akash	⋮
⠿	6	/triggers/ConTrigger.trigger Apex Trigger	Jun 14, 2024, 12:32 PM	akash	⋮
⠿	7	/objects/Case.object Custom Object	Jun 14, 2024, 12:32 PM	akash	⋮

In **Packages**, users can easily add files directly from the Compare screen, the File Catalog, by revision, or through search.

These files in the package are sequenced according to their dependencies and can be manually adjusted through drag-n-drop.

SFDC_24_Jun_13 ☆

+ ADD TAG

Description ✎

Status
◉ Active

Type
👤 User Managed

Test Level

Work Items
📋 33905 📋 35972

Standalone Release →

▶ Spring-24-v60-05

FlexDeploy / Salesforce / Spring-24   ★ ⋮
＋ ADD TAG

🗂 Packages   🏃 Execution   ⏵ Releases   ☁ Salesforce Org Management   ⚙ Configuration ⌄   ◉ Insights   🛡 Security

🏃 Package Execution   ✏ Package Files

[0] ⌄   🔍 Search (ctrl+k)   ＋ Add file   🛒 ⌄   📄 CREATE   DEP

⠿	1	/data/Account.csv Data	
⠿	2	/objects/Case.object Custom Object	
⠿	3	/classes/AccountController.cls Apex Class	
⠿	4	/classes/AccountController.cls-meta.xml Apex Class	akash Jun 14, 2024, 12:32 PM ⋮
⠿	5	/classes/ContactController.cls Apex Class	akash Jun 14, 2024, 12:32 PM ⋮
⠿	6	/classes/ContactController.cls-meta.xml Apex Class	akash Jun 14, 2024, 12:32 PM ⋮
⠿	7	/triggers/AccTrigger.trigger Apex Trigger	akash Jun 14, 2024, 12:32 PM ⋮

Context menu:
✏ Edit
＋ Add Subcomponents
↗ View File Content
📋 Copy Id
🗐 Copy to Package
⇄ Move to Package
⫰ Update Sequence
⇄ Evaluate
⏻ Destructive ⬤
＋ Add Test Classes
🗑 Remove

A highly useful feature of FlexDeploy for Salesforce is deploying parts of an object, such as a single Custom Field within a Case Object, instead of the entire Case Object.

The **Add Subcomponents** option allows users to find, preview, and select subcomponents for supported file types, enabling the migration of only specific parts of a file.

Test Level

Work Items
📄 33905   📄 35972

Standalone Release →

⏵ Spring-24-v60-05

5. Combine this and next 2 screens

FlexDeploy / Salesforce / Spring-24

+ ADD TAG

Packages   🏃 Execution   Releases   ☁ Salesforce Org Management   ⚙ Configuration ⌄   Insights   🛡 Security

🏃 Package Execution   ✎ Package Files

[0] ⌄   🔍 Search (ctrl+k)   + Add file   🛒 ⌄   📄 CREATE   DEP

⣿	1	/data/Account.csv Data		Jun
⣿	2	/objects/Case.object Custom Object		Jun
⣿	3	/classes/AccountController.cls Apex Class		Jun 14, 2024, 12:32 PM
⣿	4	/classes/AccountController.cls-meta.xml Apex Class		akash Jun 14, 2024, 12:32 PM
⣿	5	/classes/ContactController.cls Apex Class		akash Jun 14, 2024, 12:32 PM
⣿	6	/classes/ContactController.cls-meta.xml Apex Class		akash Jun 14, 2024, 12:32 PM
⣿	7	/triggers/AccTrigger.trigger Apex Trigger		akash Jun 14, 2024, 12:32 PM

Context menu:
- ✎ Edit
- + Add Subcomponents
- ↗ View File Content
- 📋 Copy Id
- 📑 Copy to Package
- ↪ Move to Package
- ⌸ Update Sequence
- ⇄ Evaluate
- ⏻ Destructive [toggle]
- + Add Test Classes
- 🗑 Remove

Callout box:
FlexDeploy simplifies the process of maintaining Org cleanliness by allowing for the removal of retired or unnecessary components. With FlexDeploy, marking one or multiple files in any package as **destructive**, prompting their deletion from the Org. FlexDeploy automatically generate a destructive package for the marked files, streamlining the entire process.

👤 User Managed

Test Level

Work Items
📄 33905   📄 35972

Standalone Release →

⊙ Spring-24-v60-05

Q / Search FlexDeploy

FlexDeploy / Salesforce / Spring-24

+ ADD TAG

Packages | Execution | Releases | Salesforce Org Management | Configuration | Insights | Security

Package Execution | Package Files

[0]

> FlexDeploy streamlines the identification of associated changes in the Profiles and Permissions with a simple button click, enabling users to add these changes to the package by selecting **Add Profiles and Permissions**.

| | CREATE | DEPENDENCY | ⌃ | ⋮ |

Add Profiles and Permissions

Add Test Classes

| | | | | | akash Jun 14, 2024, 6:10 PM | ⋮ |

| ⋮⋮ | 3 | /triggers/ConTrigger.trigger | Apex Trigger | | akash Jun 14, 2024, 6:11 PM | ⋮ |

| ⋮⋮ | 4 | /classes/AccountController.cls | Apex Class | | akash Jun 14, 2024, 12:32 PM | ⋮ |

| ⋮⋮ | 5 | /classes/AccountController.cls-meta.xml | Apex Class | | akash Jun 14, 2024, 6:10 PM | ⋮ |

| ⋮⋮ | 6 | /triggers/AccTrigger.trigger | Apex Trigger | | akash Jun 14, 2024, 6:11 PM | ⋮ |

| ⋮⋮ | 7 | /objects/Case.object | Custom Object | | akash Jun 14, 2024, 6:11 PM | ⋮ |

SFDC_24_Jun_13 ☆

+ ADD TAG

Description ✎

Status

◎ Active

Type

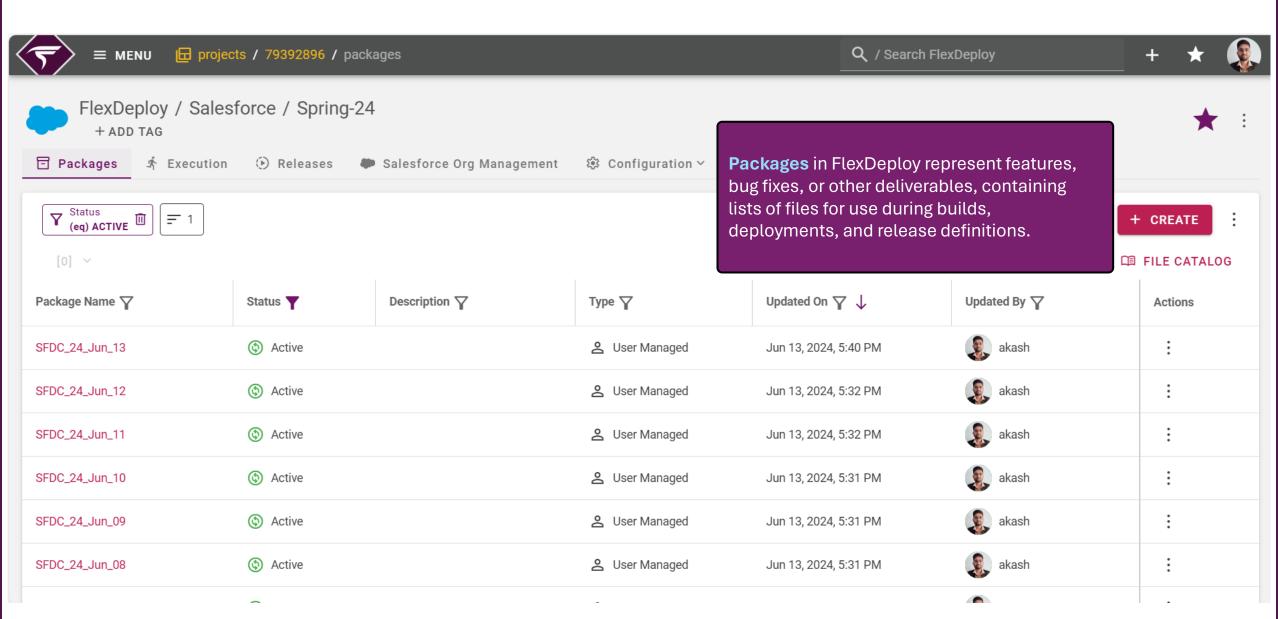👤 User Managed

Test Level

Work Items

📄 33905   📄 35972

Standalone Release →

⊙ Spring-24-v60-05

6. Combine this and next screen

Q / Search FlexDeploy

FlexDeploy / Salesforce / Spring-24

+ ADD TAG

Packages   Execution   Releases   Salesforce Org Management   Configuration ⌄   Insights   Security

Package Execution   Package Files

[0] ⌄   Q

CREATE   DEPENDENCY   ⌃   ⋮

Add Profiles and Permissions

Add Test Classes

FlexDeploy automatically recognizes Test Classes associated with package files, seamlessly incorporating them into the deployment process. This functionality involves identifying all Test Classes related to Apex Classes within your package, accessible by selecting **Add Test Classes**.

1   /cla
     Ape

2   /cla
     Ape

3   /trig
     Apex Trigger

4   /classes/AccountController.cls
     Apex Class

5   /classes/AccountController.cls-meta.xml
     Apex Class

6   /triggers/AccTrigger.trigger
     Apex Trigger

7   /objects/Case.object
     Custom Object

akash
Jun 14, 2024, 6:10 PM   ⋮

akash
Jun 14, 2024, 6:11 PM   ⋮

akash
Jun 14, 2024, 12:32 PM   ⋮

akash
Jun 14, 2024, 6:10 PM   ⋮

akash
Jun 14, 2024, 6:11 PM   ⋮

akash
Jun 14, 2024, 6:11 PM   ⋮

SFDC_24_Jun_13   ☆

+ ADD TAG

Description   ✎

Status

🔄 Active

Type

👤 User Managed

Test Level

Work Items

📄 33905   📄 35972

Standalone Release →

▶ Spring-24-v60-05

FlexDeploy / Salesforce / Spring-24
+ ADD TAG

Packages | Execution | Releases | Salesforce Org Management | Configuration ⌄ | Insights | Security

Package Execution

⠿	1	/classes/Contac... Apex Class	akash :50 AM
⠿	2	/triggers/ConTri... Apex Trigger	akash :50 AM
⠿	3	/data/Account.c... Data	akash :50 AM
⠿	4	/classes/Accou... Apex Class	akash 5:40 PM
⠿	5	/triggers/AccTrigger.trigger Apex Trigger	akash Jun 14, 2024, 11:50 AM
⠿	6	/objects/Case.object Custom Object	akash Jun 14, 2024, 11:53 AM

Showing 1 - 6 of 6

FlexDeploy offers several **test levels** for deployment, each determining the scope of Apex tests to be executed:

• **No Tests:** Deploys changes without running any tests.
• **Specified Tests:** Allows users to specify particular test classes.
• **Local Tests:** Executes all tests in the current namespace or package.
• **All Tests in Org:** Runs all available tests in the organization.
• **Specified and Package Tests:** An additional test level provided by FlexDeploy, automatically selecting all test classes available in the package. Users can further refine the selection by adding or removing test classes.

SFDC_24_Jun_13 ☆
+ ADD TAG

Description

Markdown is supported

No Tests

All Tests in Org

Local Tests

Specified Tests

Specified and Package Tests

Test Level

Search FlexDeploy

FlexDeploy / Salesforce / Spring-24

+ ADD TAG

Packages   Execution   Releases   Salesforce Org M

File Catalog

Active (eq) true   🗑   ☰ 1

The **File Catalog** represents the Salesforce resources which are stored in a source control system, such as Git or Subversion or those coming from your Salesforce Org.

For Salesforce project, the files in the catalog are automatically discovered and categorized by object type (such as Apex Class, Flexipage, Custom Object, Data, etc.).

ery ▾   📄 CREATE

[0] ▾

⟳ DISCOVER

Active ▼	File Path ▼	Type ▼	Updated On ▼ ↓	Updated By ▼	Actions
✓	/flexipages/Account_Record_Page.flexipage	Flexipage	Jun 14, 2024, 12:33 PM	akash	⋮
✓	/queues/Queue1.queue	Queue	Jun 13, 2024, 5:40 PM	akash	⋮
✓	/flexipages/LightningSales_UtilityBar.flexipage	Flexipage	Jun 13, 2024, 5:40 PM	akash	⋮
✓	/flexipages/LightningSalesConsole_UtilityBar.flexipage	Flexipage	Jun 13, 2024, 5:40 PM	akash	⋮
✓	/flexipages/ContactCenter_UtilityBar.flexipage	Flexipage	Jun 13, 2024, 5:40 PM	akash	⋮
✓	/objects/Case.object	Custom Object	Jun 13, 2024, 5:40 PM	akash	⋮
✓	/triggers/AccTrigger.trigger	Apex Trigger	Jun 13, 2024, 5:40 PM	akash	⋮

A FlexDeploy **release** represents a production delivery milestone, whether you are using agile scrum/kanban, feature-driven development, or waterfall methodologies.

The release contains the content, either by bundling the technical components, or through work items that represent each deliverable and are mapped to those technical components at build-time.

7. We need to have more projects - Salesforce metadata, data and Mule

SFDC Pipeline
Edit Pipeline

Pipeline Info | {} Definition | Roles | Properties | X² Variables | Project Groups

UAT

Gates
- ☑ Approval

Steps
1. {} Create Pull Request
2. ◫ Wait for Approval
3. {} Merge PR
4. ☑ Deploy All
5. 🔔 Notify UAT team

Integration

Gates
- ☑ UAT Approval
- 📅 Schedule 6 AM Every Day

Steps
1. {} Create Pull Request
2. ◫ Wait for Approval
3. {} Merge PR
4. ☑ Deploy All
5. 🔔 Notify Integration Test team

Prod

Gates
- ☑ Integration Appro
- 📅 Schedule 9 PM E

Steps
1. {} Create Pull Requ
2. ◫ Wait for Approva
3. {} Merge PR
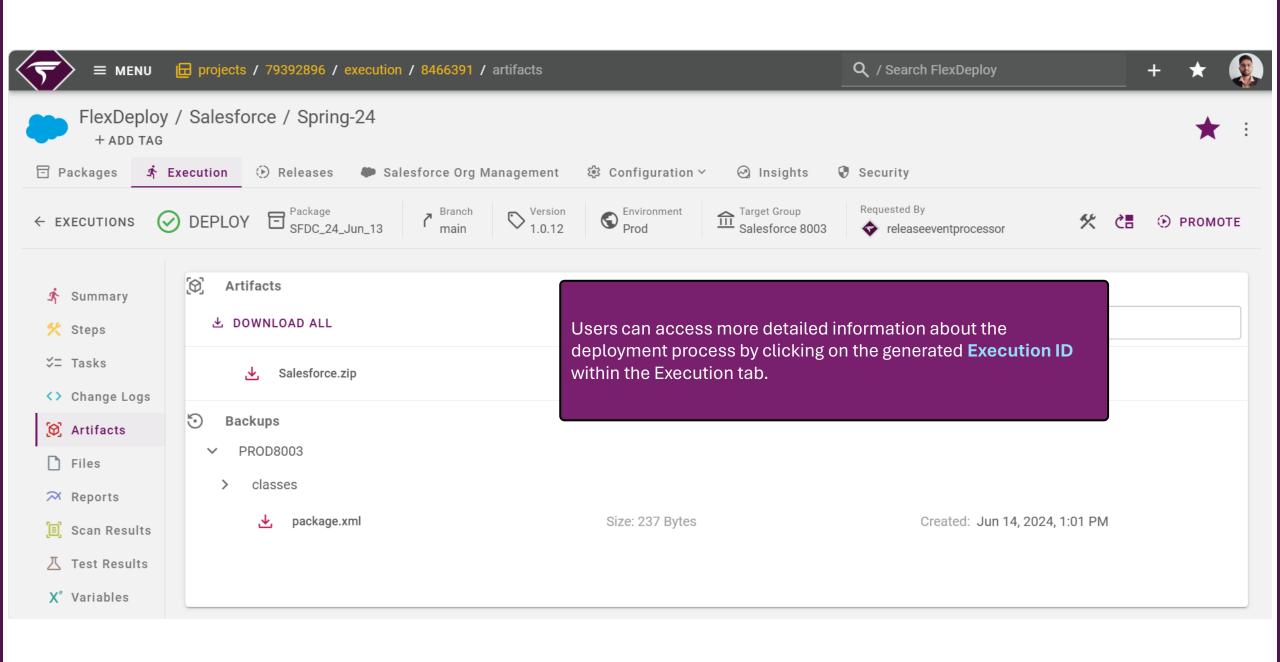4. ☑ Deploy All
5. 🔔 Notify Release Team and Dev Team

The release is bound to a **pipeline**, which defines the process used to deliver the release from UAT to Prod.
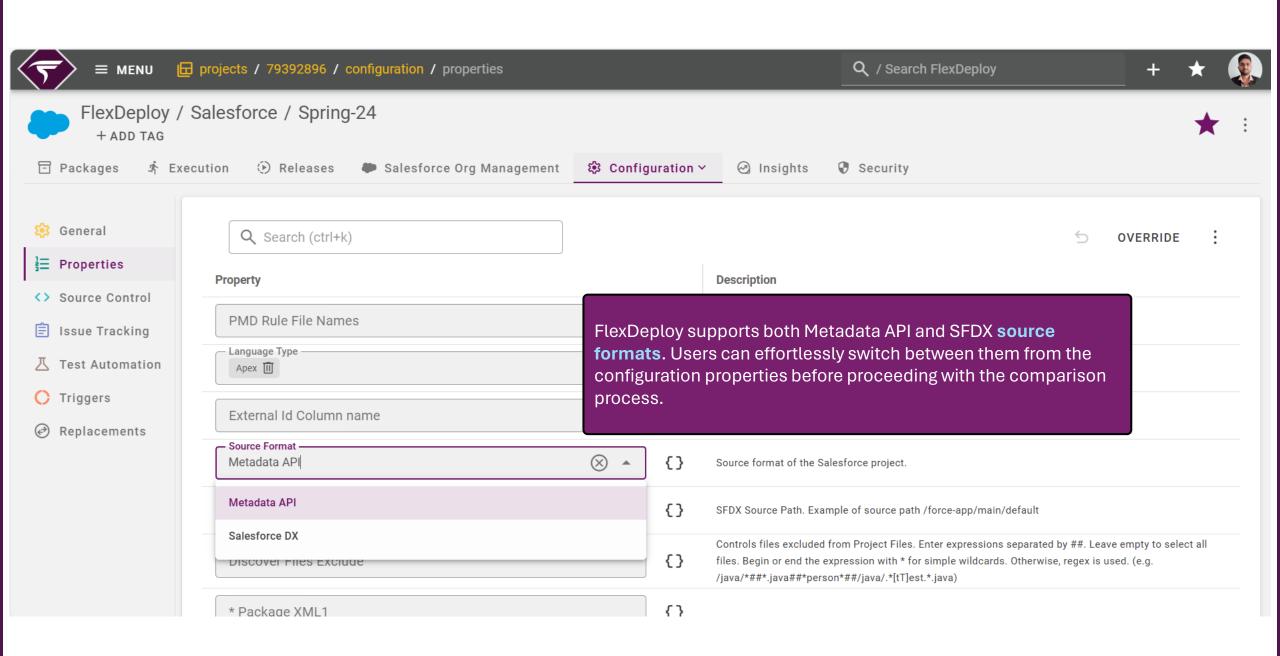
Pipelines, created via drag-n-drop or declaratively, define your software delivery process as a set of stages, each containing gates and steps.
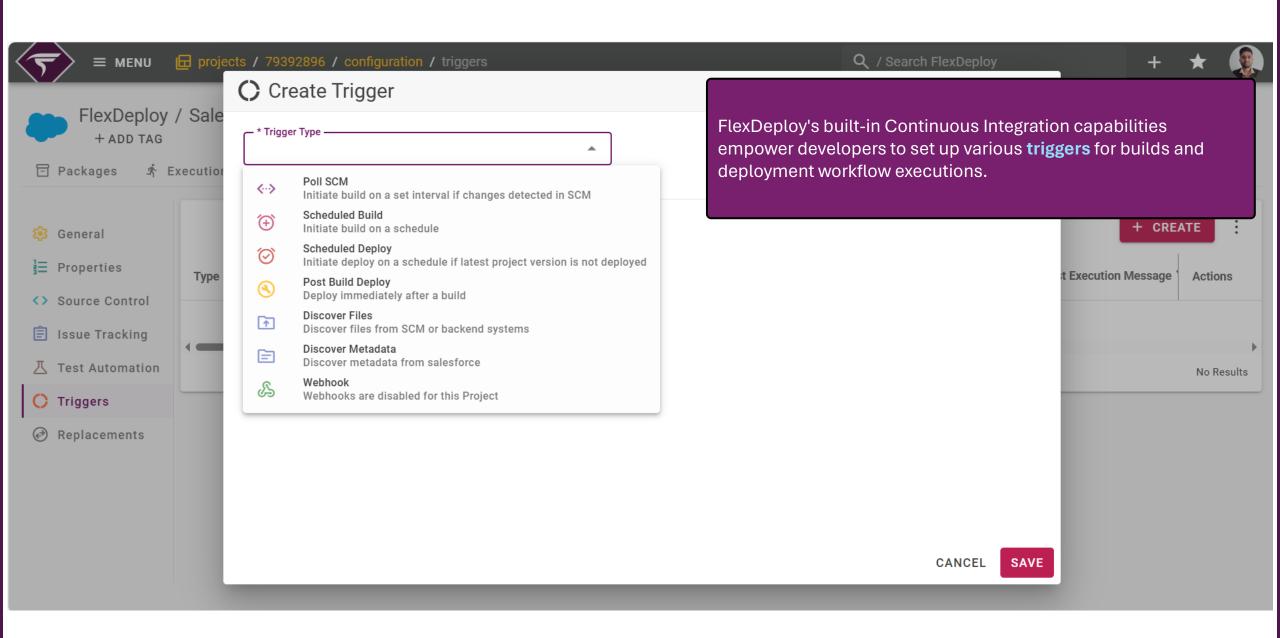
- Enforced governance and controls
- Automated testing and security scanning
- Approvals & Scheduling
- Toolchain integration
- Role-based access control
- Release insights for effective decision making

FlexDeploy / Salesforce / Spring-24
+ ADD TAG

🗐 Packages   🏃 Execution   ⊙ Releases   ☁ Salesforce Org Manag...

The Spring-24 project is used to migrate Salesforce Cloud resources from Dev Org (Sandbox) to Prod Org through Test instances.

Migrate your resources from instance to instance or from a source control system, such as GitHub or Subversion.

🔧 BUILD   ⚗ TEST

🔍 Search (ctrl+k)   ▽   ...ct a saved query   ▼   ⋮

✓ ⊞ DEPLOY #8466391
Success
Request: #1461014
🗐 SFDC_24_Jun_13   ↗ main   🏷 1.0.12   ⊙ Spring-24-v60-05
🌐 Prod   🏛 Salesforce 8003   ○ 33d971359ec4   🗐 33905
◆ releaseeventprocessor
Jun 14, 2024, 1:01 PM (41s)   🔧   ⊂▤

✓ ⊞ DEPLOY #8466328
Success
Request: #1460998
🗐 SFDC_24_Jun_13   ↗ main   🏷 1.0.12   ⊙ Spring-24-v60-05
🌐 QA   🏛 Salesforce 8003   ○ 33d971359ec4   🗐 33905
◆ releaseeventprocessor
Jun 14, 2024, 1:00 PM (41s)   🔧   ⊂▤

✓ 🔧 BUILD #8466243
Success
Request: #1460976
🗐 SFDC_24_Jun_13   ↗ main   🏷 1.0.12   ⊙ Spring-24-v60-05
🌐 Development ▮   🏛 Salesforce 8003   ○ 33d971359ec4   🗐 33905
◆ buildsubmitmonitor
Jun 14, 2024, 12:59 PM (95s)   🔧   ⊂▤

✓ ⊞ DEPLOY #8462309
Success
Request: #1459499
🗐 SFDC_24_Jun_13   ↗ main   🏷 1.0.11   ⊙ Spring-24-v60-05
🌐 Prod   🏛 Salesforce 8003   ○ a0b1122234c5
◆ releaseeventprocessor
Jun 13, 2024, 5:53 PM (43s)   🔧   ⊂▤

⊞ DEPLOY #8462246   🗐 SFDC_24_Jun_13   ↗ main   🏷 1.0.11   ⊙ Spring-24-v60-05

8. We will remove this and next 2 screens

Q / Search FlexDeploy

FlexDeploy / Salesforce / Spring-24

+ ADD TAG

Packages | Execution | Releases | Salesforce Org Management | Configuration ⌄ | Insights | Security

← EXECUTIONS   ✓ DEPLOY   Package SFDC_24_Jun_13   Branch main   Version 1.0.12   Environment Prod   Target Group Salesforce 8003   Requested By releaseeventprocessor   ⚒ ⟳ ▶ PROMOTE

Summary
Steps
Tasks
Change Logs
Artifacts
Files
Reports
Scan Results
Test Results
Variables

Artifacts

⬇ DOWNLOAD ALL

⬇ Salesforce.zip

Backups

⌄ PROD8003

> classes

⬇ package.xml   Size: 237 Bytes   Created: Jun 14, 2024, 1:01 PM

Users can access more detailed information about the deployment process by clicking on the generated **Execution ID** within the Execution tab.

FlexDeploy / Salesforce / Spring-24
+ ADD TAG

Packages | Execution | Releases | Salesforce Org Management | **Configuration** ⌄ | Insights | Security

General
Properties
Source Control
Issue Tracking
Test Automation
Triggers
Replacements

Q Search (ctrl+k)

↺ OVERRIDE ⋮

Property

Description

PMD Rule File Names

┌─ Language Type ─────────
│ Apex 🗑
└──────────────────────────

External Id Column name

┌─ Source Format ─────────
│ Metadata API   ⊗ ▲
└──────────────────────────

| Metadata API |
| Salesforce DX |

Discover Files Exclude

* Package XML1

FlexDeploy supports both Metadata API and SFDX **source formats**. Users can effortlessly switch between them from the configuration properties before proceeding with the comparison process.

{ } Source format of the Salesforce project.

{ } SFDX Source Path. Example of source path /force-app/main/default

{ } Controls files excluded from Project Files. Enter expressions separated by ##. Leave empty to select all files. Begin or end the expression with * for simple wildcards. Otherwise, regex is used. (e.g. /java/*##*.java##*person*##/java/.*[tT]est.*.java)

{ }

FlexDeploy / Salesforce / Spring-24
+ ADD TAG   ★   ⋮

Packages Execution Releases Salesforce Org Management **⚙ Configuration ˅** Insights Security

General

Properties
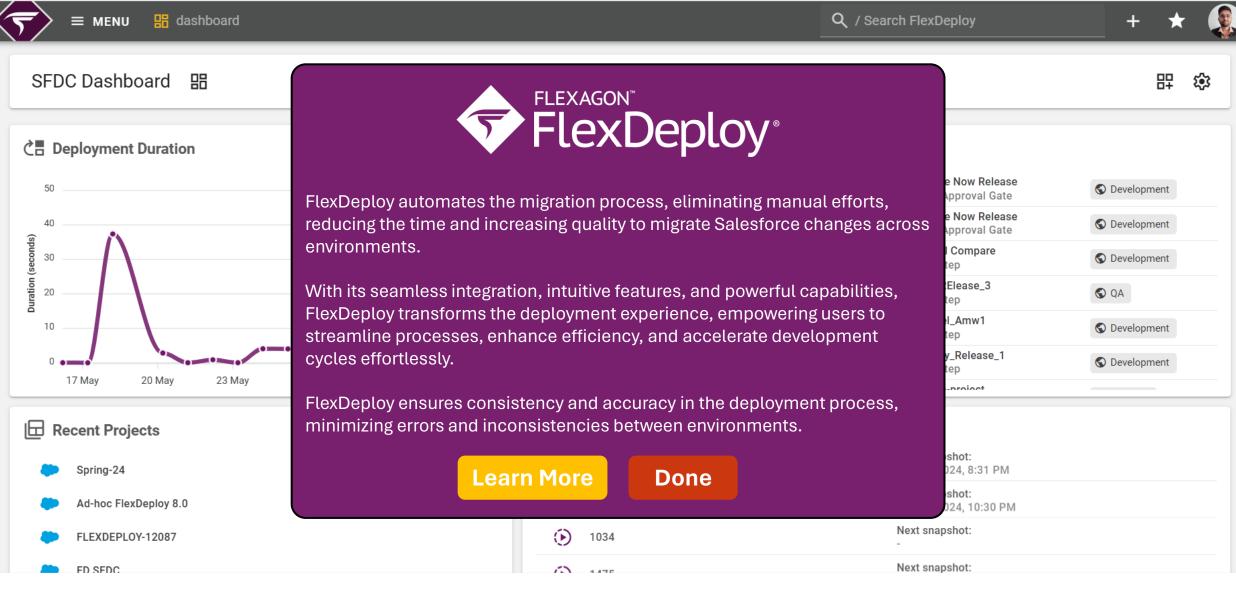
Source Control

Issue Tracking

Test Automation

Triggers

Replacements

⬇ DOWNLOAD

```
1    # ---
2    fileName: "*.queue"
3    replacements:
4      - stringToReplace: "@flexagon.prod.flexdbox"
5        replaceWithString: "@flexagon.prod"
6    # ---
7    fileName: "*.autoResponseRules"
8    replacements:
9      - stringToReplace: "<senderEmail>akash-sd@flexagon.prod.flexdbox</senderEmail>"
10       replaceWithString: "<senderEmail>akash-pd@flexagon.prod</senderEmail>"
11
12     - stringToReplace: "<senderName>Test User</senderName>"
13       replaceWithString: "<senderName>Prod User</senderName>"
14   # ---
15
```

FlexDeploy provides a straightforward configuration for adjusting and substituting strings in artifact files with environment-specific values before deployment, known as **Replacements**. These configured replacements are executed on all artifacts as a pre-step before the deployment execution.

FlexDeploy **dashboards** provide metrics for your DevOps processes, making teams more productive and offering insights necessary for release readiness assessments and continuous improvement.

- DORA metrics
- Deployment success rates
- Recent source code commits tied to builds
- Recent agile planning issues tied to builds
- Results from test automation and security scanning
- Design your own dashboards and share with team members

9. We need to change the background screen as it is a repeat.