

Common Admin Deployments

This is a space to create logs of common Admin deployments and the relevant metadata components that need to be included in such deployments. This is to aide all users deploying admin changes in Salesforce leveraging Copado.

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Performance Org

FIELDS

Standard & Custom Field NEW

AMEND

REMOVE

- Field
- Record Type
- Page Layout
- Profile

- Field
- Record Type
- Page Layout
- Profile

- Field

PICKLISTS

Standard & Custom Fields

For Custom Picklist Fields with manually added Picklist Values and no RecordType Assignments:

- Select the **CustomField** metadata type and select the custom Picklist field by its API Name. This contains the field definition, including all manually added picklist values.
- Select the associated **Profiles and/or Permission Sets**. This will set FLS for the Picklist Field on the Profiles/Perm Sets

<https://docs.copado.com/articles/#!/copado-ci-cd-publication/how-to-commit-and-deploy-picklist-fields>

For Custom Picklist fields with manually added Picklist Values and RecordType Assignments:

- Select the **CustomField** metadata type and select the custom Picklist field by its API Name. This contains the field definition, including all manually added picklist values.
- Select the **RecordType** metadata type and select the record type name. This will commit the field definition, the field's picklist values and the assignments in the record type.
- Select the associated **Profiles and/or Permission Sets**. This will set FLS for the Picklist Field and Record Type Assignment on the Profiles/Perm Sets

<https://docs.copado.com/articles/#!/copado-ci-cd-publication/how-to-commit-and-deploy-picklist-fields>

For Custom Picklist fields with a Custom Picklist Value Set and no RecordType Assignments:

- Select the **CustomField** metadata type and select the custom Picklist field by its API Name. This contains the field definition.
- Select the **GlobalValueSet** metadata type and select the Custom Picklist Value Set used in the picklist field. This contains the picklist values.
- Select the associated **Profiles and/or Permission Sets**. This will set FLS for the Picklist Field on the Profiles/Perm Sets

<https://docs.copado.com/articles/#!/copado-ci-cd-publication/how-to-commit-and-deploy-picklist-fields>

For custom picklist fields with a Custom Picklist Value Set and Record Type Assignments:

- Select the **CustomField** metadata type and select the custom Picklist field by its API Name. This contains the field definition.

<https://docs.copado.com/articles/#!/copado-ci-cd->

- Select the **GlobalValueSet** metadata type and select the Custom Picklist Value Set used in the picklist field. This contains the picklist values.
- Select the **RecordType** metadata type and select the record type name. This will commit the field definition, the field's picklist values and the assignments in the record type.
- Select the associated **Profiles and/or Permission Sets**. This will set FLS for the Picklist Field and Record Type Assignment on the Profiles/Perm Sets

[publication/how-to-commit-and-deploy-picklist-fields](https://docs.copado.com/articles/#!/copado-ci-cd-publication/how-to-commit-and-deploy-picklist-fields)

For standard picklist fields (e.g. Case Type) with a Standard Picklist Value Set and no Record Type Assignments:

<https://docs.copado.com/articles/#!/copado-ci-cd-publication/how-to-commit-and-deploy-picklist-fields>

- Select the **CustomField** metadata type and select the standard Picklist field by its API Name (i.e. Case.Type). This contains the field definition.
- Select the **StandardValueSet** metadata type and select the Standard Value Set by its API Name (i.e. CaseType). This contains the picklist values.
- Select the associated **Profiles and/or Permission Sets**. This will set FLS for the Picklist Field on the Profiles/Perm Sets

For standard picklist fields (e.g. Case Type) with a Standard Picklist Value Set and Record Type Assignments:

<https://docs.copado.com/articles/#!/copado-ci-cd-publication/how-to-commit-and-deploy-picklist-fields>

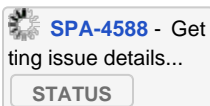
- Select the **CustomField** metadata type and select the standard Picklist field by its API Name (i.e. Case.Type). This contains the field definition.
- Select the **StandardValueSet** metadata type and select the Standard Value Set by its API Name (i.e. CaseType). This contains the picklist values.
- Select the **RecordType** metadata type and select the record type name. This will commit the field definition, the field's picklist values and the assignments in the record type.
- Select the associated **Profiles and/or Permission Sets**. This will set FLS for the Picklist Field and Record Type Assignment on the Profiles/Perm Sets

For the Salutation standard picklist field with Record Type Assignments:

<https://docs.copado.com/articles/#!/copado-ci-cd-publication/how-to-commit-and-deploy-picklist-fields>

- Select the **CustomField** metadata type and select the standard Picklist field <http://Lead.Name>.
- Select the **StandardValueSet** metadata type and select the Standard Value Set Salutation.
- Select the **RecordType** metadata type and select the record type name. This will commit the field definition, the field's picklist values and the assignments in the record type.

SEARCH LAYOUTS



If you need to commit and deploy a change that was made in a search layout in the **Account** object, you will have to select the **Account** object in the commit screen.

This will commit all the attributes in the account object including the Search Layouts

<https://docs.copado.com/articles/copado-ci-cd-publication/how-to-commit-and-deploy-search-layouts-with-copado>

ACTIVITY FIELDS

- When moving FLS to a new field:
 1. Profile(s) to which this field should be accessible.
 2. CustomField starts with 'Activity' plus the custom field name.
 3. CustomField starting with 'Event' plus the custom field name (marked as **Retrieve Only**).
 4. CustomField starting with 'Task' plus the custom field name (marked as **Retrieve Only**).
- When moving FLS for an existing field:
 1. Profile(s) to which this field should be accessible.
 2. CustomField starting with 'Event' plus the custom field name (marked as **Retrieve Only**).
 3. CustomField starting with 'Task' plus the custom field name (marked as **Retrieve Only**).

<https://docs.copado.com/articles/copado-ci-cd-publication/how-to-deploy-fls-for-activity-fields>

PAGE LAYOUTS

NEW

AMEND

Group Org

INITIAL REQUEST	CRITERIA	SELECT	RETRIEVE	Examples
Edit Field Picklist	<ul style="list-style-type: none">Record Type Assignment,Standard Picklist Value Set	<ul style="list-style-type: none">Record Type,Standard Value Set,Custom Field		SPA-2694
Edit Mandatory fields	<ul style="list-style-type: none">Page Layout Assignment	<ul style="list-style-type: none">Page Layout		SPA-2770

Users

Adding Access to a profile

- Select profile
- Retrieve field/record type/layout whatever it is your giving them access to

Page Layouts

Citation Org - Unused : (No need to use in Copado)

