**Package Creation**

1. Merge Jiras designated for next build through the branching system.
   1. Jira branch🡪 Minor Build Testing, Minor Build Testing🡪 Next Build, Next Build🡪 Packaging Source
      1. Then back merge Next Build🡪 Minor Build Testing and then Minor Build Testing🡪 Test Build
   2. Once all branches are in sync, check the latest closed PR that was merged to Packaging Source branch. Need to view all files merged and note new fields, existing object changes that aren’t automated in the package, and Validation changes (de-activation or activation of existing validation rules. These will need to be noted in the manual steps doc for the team to run during upgrades.
2. New objects need to be noted to give the correct permissions in pde4 before packaging. Give new fields permissions to RS Baseline Platform Users, RS Full Access Platform Users, and System Administrator.
3. Create major/minor package release.  The release can include new files, changes to existing files and custom object changes.  The following tasks are done in the pde4 packaging org.
   1. Compile all classes
      1. Setup | Develop | Apex Classes
      2. Select the “Compile all classes” link
   2. Verify the “Is Valid” checkbox is set on all Apex Classes
   3. Run all test classes
      1. Setup | Develop | Apex Classes
      2. Select the “Run All Tests” button
      3. Note: This step can take up to 30 minutes.  Any failures must be addressed before proceeding with the package upload.  A successful run will indicate total Code Coverage percentage which must be 75% or greater before the package can be uploaded.
      4. Comment out any failed test classes and run those test classes separately to confirm they are commented out
      5. Note any failed test classes and create a ticket for development to look at the test classes
4. Add Profile Permissions for new object fields to below profiles in pde4
   1. RS Baseline Platform Users
   2. RS Full Access Platform Users
   3. System Administrator
5. Add Profile Permissions for new classes and pages to below profiles in pde4
   1. RS Baseline Platform Users
   2. RS Full Access Platform Users
6. Display the package UI screen
   * 1. Setup | Create | Packages
     2. Select Manufacturing package
7. Add any new package components to the package
   * 1. Components tab | Add button
     2. Select the Component Type, the components and Add To Package button
     3. Note: You cannot add components from multiple Component Types in a single session
     4. Classes, Static Resources, and Pages always push all files in these three components
     5. There will occasionally be new added Tabs, Reports, Custom Report Type, Flow Definition, amongst other new components. You should have an idea of what new components are being added based on what has been merged in Github. But always double check the majority of the Component Types to see if there is something new. But never add them if you are unsure they should be packaged.
8. Upload the new package
   * 1. Setup | Create | Packages
     2. Select Manufacturing package
     3. Select the Upload button
     4. Note: The upload UI screen takes about 20-30 minutes to render
     5. Enter Version Name – Currently using Spring 2022 and Version Number with be automatically inputted

Graphical user interface, text, application, email

Description automatically generated

* + 1. Upload time is currently 2-3 hours

1. Deploy new package version to package testing orgs
   1. Dev-qa-ff, QA-RSF, Automation Testing Org, Dev-QA
   2. Will need to keep pde3n and pde5n in sync with new builds also
2. Metadata Tool Updates
   1. Metadata Tool csv will need to be updated with new automated steps. Please see Metadata ToolKit instructions doc. This will be done in dev-qa-ff before running manual steps in this org for new build.

**Patch Creation – Immediately after upload is successful**

1. Create patch release – This option can be used in place of creating a major/minor release if the changes are limited to simple code changes.  No new files and or object changes are allowed in a patch release.
   1. Create patch org.  Note: Multiple patch releases can be created from the same patch org within the same major.minor version.
   2. LOG-IN: [admin@rstk\_1.173.patch](mailto:admin@rstk_1.173.patch)
   3. Password: R00tst0ck
   4. STEPS TO CREATING PATCHING ORG
      1. Log into the pde4 packaging org
      2. Setup | Create | Packages
      3. Select Manufacturing package
      4. Select the Patch Organizations tab
      5. Select the New button
      6. Select the appropriate release version
      7. Make a note of the User Name
         1. Put in RS support email
      8. Select the Save button
      9. Note: A SF org will be created with the meta-data of this release.  SF sends an email when complete.  Takes about 2 hours.
   5. Remove Quick Actions from Page Layouts (listed in step g.) below only in new patch orgs before creating patch:
      1. Page Layouts:
         1. Task Page layout – Currently no quick actions need to be removed. There should be no quick actions visible on this layout
         2. Lead Page Layout – Remove ‘New Task’, ‘Log a Call’, ‘New Case’, ‘New Note’, ‘New Event’ from Quick Actions in the Salesforce Classic Publisher section. These Quick actions need to be dragged to the top section which will remove them from the page layout
         3. Contract Page Layout – Remove ‘New Event’, ‘New Task’, ‘Log a Call’ from Quick Actions in the Salesforce Classic Publisher section. These Quick actions need to be dragged to the top section which will remove them from the page layout
      2. All of the below page layouts are all listed under Contract Page Layout. Just search in quick find search box for ‘Contact’ and select Contact Page Layout. The below 4 layouts will then appear in a list
         1. Contact (Sales) Page Layout – Remove ‘New Task’, ‘Log a Call’, ‘New Case’, ‘New Note’, ‘New Event’.
         2. Contact (Marketing) Page Layout – Remove ‘New Task’, ‘Log a Call’, ‘New Case’, ‘New Note’, ‘New Event’
         3. Contact (Support) Page Layout – Remove ‘New Task’, ‘Log a Call’, ‘New Case’, ‘New Note’, ‘New Event’
         4. Contact Page Layout – Currently no quick actions need to be removed but always double check. This layout should have Post, File, Link, Poll, Email available in the Quick Actions visible on the layout
   6. Compile all classes – make sure no invalid classes
   7. If move a class file or trigger file, need to run test classes associated with other files in ticket
   8. If creating a patch to an older version, then please manually make the changes in the patch org on the changed files. Best practice is to have the developer make these changes directly in the patch org.
   9. Upload patch release
      1. Log into the patch org
      2. Setup | Create | Packages
      3. Click Upper Right Corner (Developing Rootstock ERP)
      4. Select the Upload button
      5. Note: The upload UI screen takes about 30 minutes to render
      6. Enter Version Name
      7. Version Number is automatically set
      8. Set Release Type to Managed
      9. Select Upload button
      10. Note: The upload 2 and a half hours.  SF emails the package installation URL when complete.
   10. Deploy patch to target org
       1. Log into the pde4 packaging org
       2. Setup | Create | Packages
       3. Select Manufacturing package
       4. Select the Versions tab
       5. Select the Push Upgrades button
       6. Select Schedule Push Upgrade button
       7. Select the appropriate Version
       8. Select the appropriate Organization Name (dev-qa-ff is org ID 00DE0000000bXSU)
       9. Select the Schedule button