**Setting up Metadata Tool and creating CSV file with automated steps**

1. Download ‘Metadata Tool’ with below info
   1. Copy url link – Version 1.25

‘<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t1R0000010MGJ>

* 1. Password = n2q3w5

1. After installation the tool should show up in the ‘App dropdown’ and will be named ‘Rootstock Metadata Tool’

**Creating automated steps in Metadata Tool**

1. Select ‘Metadata Manager’ in tabs bar
2. Make sure you have ‘Available’ tab selected
3. Select ‘New’
   1. Fill in each field that applies to the step
      1. ‘Metadata Action’ should contain what Jira and what type of action
      2. ‘Package Version’ = what package version this step is a part of
      3. ‘Group’ and ‘Sequence’ can be selected if you need multiple steps run together/sequentially. Make sure that the sequence is numbered in ascending order for each step that needs to be run together
      4. ‘Type’ = type of automated step
      5. ‘Action’ = what needs to happen to the component (Select ‘Delete’ for deleting a validation rule, etc.)
   2. A new set of fields will appear once the main fields are filled in correctly.
      1. This is where you fill in the info of the components being modified
         1. You will have to use API names of fields for any automated object changes
   3. Click ‘Save’ and you will see this step in the ‘Available’ tab
4. Once you have all the automated steps noted, you will select all the steps you want to be executed and then select ‘Execute’
   1. You will see errors on steps if they are not in fact able to be automated or if the info in the step is wrong
5. When all the steps have been executed then those steps will be transferred to the ‘Completed’ tab

**Creating CSV file**

1. Select all completed steps for the package version wanted in the csv and then select ‘Export’

2. Type in the name of the CSV file (for specific builds just put 19.9 or 18.150)

3. Select ‘Export’ and a CSV file will be created