SF packaging guide:

<https://resources.docs.salesforce.com/204/latest/en-us/sfdc/pdf/salesforce_packaging_guide.pdf>

See section ‘Editing Components and Attributes after Installation’ for info on what can be modified by users on the target org. In general, any attribute listed under “Subscriber and Developer Locked

Editable” will require a manual step on the target org.

Some of the manual steps are only required when migrating from pde5f to pde4f because pde4f is a ‘packaging’ org.

Always refresh your Eclipse projects before comparing objects in DiffDog.

Manual step required:

1. New field on existing object OR all fields on a new object
   1. Fix FLS (field-level security) for the following profiles
      1. RS Standard Platform User - Full Access
      2. RS Standard User - Full Access
      3. System Administrator
2. List Views
   1. New list views added by staff OR new list views where the FullName does not start with “RS\_” need to deleted in both the source and targets orgs
   2. There should be 1 (sometimes 2or 3) list views where the FullName starts with “RS\_”. These are the only list views that should exist in pde3f/pde5f/pde4f.
   3. Sometimes the “RS\_” list view will get deleted in an org. It will need to be manually added.
   4. Send an email to anyone who messes up a list view as a reminder
3. Help Text on Financials fields – must be kept in sync between pde3f/pde5f/pde4f
4. HelpText on ERP fields that exist on Financials objects
   1. Need to copy/paste the help text from pde3f to pde5f/pde4f
5. New Pick List values
   1. Add new values in same order based on the source org

Differences can be ignored:

1. <searchLayouts>

<excludedStandardButtons>Accept</excludedStandardButtons>

<excludedStandardButtons>ChangeOwner</excludedStandardButtons>

1. <label> tag on custom fields
2. Help Text on Financials fields – can be ignored if text exists pde5f and does not exist in pde4f
3. <precision> tag on custom fields
4. <scale> tag on custom fields
5. <formula> tag on custom fields
6. <defaultValue> tag on custom fields