

Phase 9 – Deployment

Objective: Move project to Production org.

1. Prepare all components: Objects, Fields, Formulas, Layouts, Roll-Ups, Flows.
2. **Outbound Change Set:**
 - Add all components
 - Upload to target org
3. Deploy in target org → validate formulas and layouts.
4. Optional: Create **user guide** for entering Holdings, viewing Portfolio metrics, and interpreting P&L.

Tips:

- Test deployment with sample data in production.
- Verify all roll-ups and formulas post-deployment.

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Deployment

Deployment

Setup

Outbound Change Set

PortfolioTracker_Deployment

Label

PortfolioTracker_Deployment

Description

Change set for deploying the Portfolio Tracker project. from Sandbox to Production

Created By

Sandbox User, 6/1/2024 11:04 AM

Change Set Components

Upload

Add components to this change set.

| Component | Type |
|----------------|---------------|
| Portfolio | Custom Object |
| Holding | Custom Object |
| Price Snapshot | Custom Field |

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Deployment

Setup

Deploy Confirmation

PortfolioTracker_Deployment

Label

PortfolioTracker_Deployment

Description

Change set for deploying the Portfolio Tracker project from Sandbox to Production

Created By

Sandbox User, 6/1/2024 11.04 AM

| Change Set Components | Type |
|-----------------------|---------------|
| Portfolio | Custom Object |
| Holding | Custom Object |

Cancel

Deploy

ements

Record-Triggered Flow

Auto-Layout

Debug

Save ↵



Assignment

Calculate Portfolio P&L



Assignment

Label

Calculate Portfolio P&L

Set Variable Values

+ Add Assignment

Delete

Done