

MetadataExplorer - Deployment Guide

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1. Introduction

1.1 Document Purpose

This guide provides step-by-step instructions for deploying the MetadataExplorer package to Salesforce organizations. It covers installation, configuration, and verification procedures.

1.2 Package Overview

Property	Value
Package Name	MetadataExplorer
Package Type	Managed 2GP (Second Generation Package)
Namespace	metaexp
Current Version	0.1.0-1
API Version	64.0

1.3 Deployment Scope

- 2 Apex Classes (Controller + Test)
- 1 Lightning Web Component
- 4 Static Resources (PDF libraries)
- 1 FlexiPage (App page)

2. Prerequisites

2.1 System Requirements

2.1.1 Salesforce Edition Requirements

Salesforce Edition	Supported	Notes
Enterprise	✓ Yes	Recommended
Unlimited	✓ Yes	Recommended
Performance	✓ Yes	Recommended
Developer	✓ Yes	For testing only
Professional	✗ No	No API access
Essentials	✗ No	No API access

2.1.2 Technical Requirements

Requirement	Specification	Mandatory
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API Version	64.0 or higher	Yes
Lightning Experience	Enabled	Yes
API Access	Enabled	Yes
Available Storage	<2 MB	Yes
Custom Objects	Not required	No

2.1.3 User Requirements

Permission	Purpose	Required For
System Administrator	Installation	Installation only
Customize Application	Configuration	Post-installation setup
Apex Class Access	Configuration	Post-installation setup
View Setup and Configuration	Using the app	End users
API Enabled	Querying metadata	End users
View All Data	Full metadata access	Recommended for admins

2.2 Browser Compatibility

Browser	Minimum Version	Status
Chrome	90+	✓ Fully Supported
Firefox	88+	✓ Fully Supported
Safari	14+	✓ Fully Supported
Microsoft Edge	90+	✓ Fully Supported
Internet Explorer 11	Any	✗ Not Supported

2.3 Mobile Support

Platform	Minimum Version	Status
Salesforce Mobile App (iOS)	iOS 14+	✓ Supported
Salesforce Mobile App (Android)	Android 8+	✓ Supported
Mobile Safari	iOS 14+	✓ Supported
Chrome Mobile	Android 8+	✓ Supported

2.4 Pre-Installation Checklist

- ☐ Salesforce org meets edition requirements
- ☐ Lightning Experience is enabled
- ☐ API access is enabled
- ☐ User has System Administrator profile
- ☐ Backup of org configuration completed (optional but recommended)
- ☐ Installation window scheduled (15-30 minutes)
- ☐ Stakeholders notified of installation

3. Installation Methods

3.1 Method 1: Installation via URL (Recommended)

Best For: Administrators, quick installation

3.1.1 Production Org Installation

Step 1: Access Installation URL

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04tf60000007YbFAAU>

Step 2: Login

- Enter your Salesforce credentials
- Use production org credentials

Step 3: Security Review

- Review package contents
- Click "Continue"

Step 4: Choose Installation Option

Option	Description	Recommended For
Install for Admins Only	Only System Admins can access	Initial testing
Install for All Users	All users get access	Production deployment
Install for Specific	Selected profiles only	Controlled rollout

Profiles		
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Recommendation: Install for Admins Only initially, then grant access via Permission Sets

Step 5: Approve Third-Party Access

- Review: jsPDF and jsPDF-AutoTable libraries
- Check: "Yes, grant access to these third-party websites"
- Click "Continue"

Step 6: Install

- Click "Install"
- Wait for installation (typically 2-5 minutes)

Step 7: Confirmation

- Verify "Installation Complete" message
- Click "Done"

3.1.2 Sandbox Org Installation

Installation URL:

<https://test.salesforce.com/packaging/installPackage.apexp?p0=04tf60000007YbFAAU>

Follow the same steps as Production, but use sandbox credentials.

3.2 Method 2: Installation via Setup UI

Best For: Manual installation by administrators

Step 1: Access Salesforce Setup

- Login to your Salesforce org
- Click the gear icon () in the upper right
- Select "Setup"

Step 2: Navigate to AppExchange

- In Quick Find, search: "AppExchange Marketplace"
- Click "AppExchange Marketplace"

Step 3: Manual Package Installation

- In Quick Find, search: "Install a Package"

- Click "Install a Package"
- Enter Package ID: 04tf60000007YbFAAU
- Click "Continue"

Step 4: Follow Installation Wizard

- Choose security level
- Approve third-party access
- Click "Install"

4. Post-Installation Configuration

4.1 Activate the Metadata Explorer App Page

Step 1: Open the 'Metadata Explorer App Page' under Setup → Lightning App Builder → Metadata Explorer App Page → View

Step 2: Click on Activate button.

Step 3: Select the setting, which all users should see the page.

Step 4: Click Save.

5. Verification & Testing

5.1 Component Verification

5.1.1 Apex Class Verification

Manual Verification:

- Setup → Apex Classes
- Find: META_MetadataExplorerController
- Click "Manage" → "Run Tests"
- Verify: All tests pass

5.1.2 Lightning Component Verification

Step 1: Open App

- App Launcher → Metadata Explorer

Step 2: Visual Check

- Title: "Metadata Explorer" displayed
- Left panel: 14 checkboxes visible
- Right panel: "Download PDF" button visible

Step 3: Functionality Check

- Check 1-2 metadata types
- Click "Download PDF"
- Verify: Loading spinner appears
- Verify: PDF downloads successfully

6. Troubleshooting

6.1 Common Installation Issues

6.1.1 Installation Failed

Issue: Package installation fails with error

Error Message: "Installation failed. Please contact the publisher."

Check	Action
Org Edition	Verify Enterprise/Unlimited/Performance edition
API Access	Enable API access in Setup → API
Storage	Verify >2 MB available storage
Governor Limits	Check for active long-running processes

Steps:

1. Check Setup → System Overview → Storage
2. Verify API Enabled: Setup → Company Information
3. Retry installation after 15 minutes
4. Contact CloudWithAbhi support if issue persists

6.1.2 Permission Denied

Issue: Users cannot access Metadata Explorer

Error Message: "You don't have access to this app"

Solution:

1. Verify user has apex class "metaexp.META_MetadataExplorerController" access
2. Check profile has "View Setup and Configuration"
3. Verify user has "API Enabled" permission
4. Re-assign permission set
5. Have user logout and login again

6.1.3 Component Not Visible

Issue: Metadata Explorer not showing in App Launcher

Solution:

1. Setup → App Manager
2. Find "Metadata Explorer"
3. Edit app
4. Check "Visible in Lightning Experience"
5. Assign to user profiles
6. Save and refresh browser

6.2 Runtime Issues

6.2.1 No Metadata Found

Cause	Explanation	Solution
Class access issue	User does not have 'sescore.META_MetadataExplorerController' permission.	
No metadata exists	Org has no components of that type	Normal behavior, select other types
Permission issue	User lacks "View Setup" permission	Grant required permissions
Sharing rules	Metadata not shared with user	Grant "View All Data" permission

6.2.2 PDF Export Fails

Issue: PDF does not download

Symptoms:

- Loading spinner indefinitely
- Error message displayed
- Browser console errors

Solutions:

Solution	Steps
Check Browser	Try different browser (Chrome recommended)
Disable Pop-up Blocker	Allow pop-ups for Salesforce domain
Clear Cache	Clear browser cache and cookies
Check Static Resources	Verify jsPDF libraries loaded: Browser DevTools → Network tab
Reduce Selection	Select fewer metadata types (try 1-2 first)

6.2.3 Slow Performance

Cause	Solution
Large Dataset	Select fewer metadata types
Many Custom Fields	CustomField query is complex, avoid if not needed
Browser Resources	Close other tabs, restart browser
Network	Check internet connection speed

6.3 Mobile Issues

6.3.1 Mobile App Not Showing

Issue: Metadata Explorer missing from Salesforce Mobile App

Solution:

1. Setup → Salesforce Mobile App → Mobile Navigation
2. Add "Metadata Explorer" to Selected Items
3. Save
4. Force close and reopen mobile app

6.3.2 Mobile PDF Download

Issue: PDF doesn't download on mobile

Behavior: On mobile, user may need to tap download notification

Solution:

- iOS: Tap notification → "Open in Files"
- Android: Tap notification → "Download complete"

7. Upgrade & Maintenance

7.1 Upgrading to New Version

7.1.1 Pre-Upgrade Checklist

- [] Review release notes for breaking changes
- [] Test new version in sandbox first
- [] Notify users of scheduled upgrade
- [] Back up custom configurations (permission sets, app assignments)
- [] Schedule upgrade during low-usage window

7.1.2 Upgrade Process

Via URL:

[https://login.salesforce.com/packaging/installPackage.apexp?p0=\[NEW_VERSION_ID\]](https://login.salesforce.com/packaging/installPackage.apexp?p0=[NEW_VERSION_ID])

- Click "Upgrade"
- Select security level
- Wait for completion

7.1.3 Post-Upgrade Verification

- [] Verify version: Setup → Installed Packages
- [] Test functionality (Section 5.1.2)
- [] Check for deprecation warnings
- [] Notify users of new features

7.2 Package Maintenance

7.2.1 Regular Maintenance Tasks

Task	Frequency	Purpose
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Review Usage	Monthly	Identify adoption, unused features
Permission Audit	Quarterly	Ensure proper access control
Performance Review	Quarterly	Check for performance degradation
Version Check	Monthly	Stay updated with latest version

7.2.2 Monitoring

Metric	How to Check	Red Flag
Active Users	Setup → Installed Packages → Usage	Declining usage
Error Logs	Setup → Debug Logs	Frequent errors
Performance	User feedback	Complaints about slowness

7.3 Recovery

Scenario: Unintentional Uninstall

1. Reinstall package using same version ID
2. Reassign permission sets
3. Reconfigure app navigation
4. Notify users

8. Uninstallation

8.1 Pre-Uninstallation Considerations

Warning: Uninstalling removes:

- All package components
- User access to Metadata Explorer
- Custom configurations (permission sets remain)

Before Uninstalling:

- Notify all users
- Export any important PDFs

- Document custom configurations for future reference
- Consider disabling instead of uninstalling

8.2 Uninstallation Process

8.2.1 Via Setup UI

Step 1: Access Installed Packages

- Setup → Installed Packages

Step 2: Uninstall

- Find "MetadataExplorer"
- Click "Uninstall"
- Confirm uninstallation
- Click "Yes, Uninstall"

Step 3: Verify

- Wait for confirmation message
- Check that package no longer appears in Installed Packages

8.3 Post-Uninstallation Cleanup

8.3.1 Verify Removal

- [] Package no longer in Installed Packages
- [] Apex classes removed
- [] Lightning components removed
- [] Static resources removed
- [] App pages removed

8.3.2 Clean Up Configurations

Manual Cleanup:

- Delete custom permission sets (optional)
- Remove from app navigation (automatic)
- Remove user assignments (automatic)
- Update documentation

9. Appendices

Appendix A: Installation URLs Reference

Environment	URL
Production	https://login.salesforce.com/packaging/installPackage.apexp?p0=04tf60000007YbFAAU
Sandbox	https://test.salesforce.com/packaging/installPackage.apexp?p0=04tf60000007YbFAAU

Appendix B: Package Information

Property	Value
Package ID	0Hof600000001ddCAA
Version ID	04tf60000007YbFAAU
Version Number	0.1.0-1
Namespace	metaexp
Publisher	CloudWithAbhi

Appendix C: Support Contacts

Support Type	Contact
Email	contact@cloudwithabhi.com
GitHub Issues	https://github.com/UnicefAbhiSharma009/MetadataExplorer/issues
Documentation	https://github.com/UnicefAbhiSharma009/MetadataExplorer

Appendix D: Version History

Version	Release Date	Changes
0.1.0-1	November 2024	Initial PBO release

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