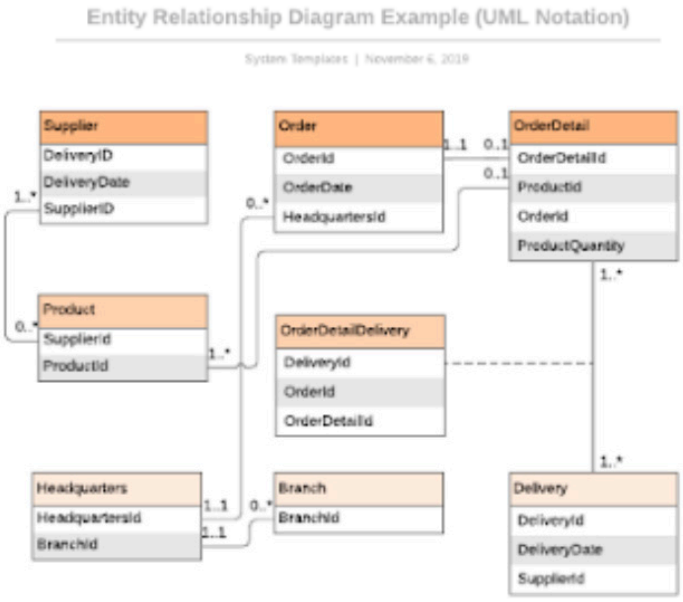
GREENER PASTURES CONSULTING - GreenSaaS

## *Are you an existing Salesforce customer? If so, what edition are you on?*

*Salesforce makes available many different license options for each of the editions they market. On top of the different licenses there are many different features that you can purchase. Some of the core features are available in a limited fashion with less expensive licenses (Professional Edition) and are unlimited with Enterprise or Unlimited Editions. Selecting the right edition for your business is important and knowing when to expand your licenses with Salesforce can be challenging. It's similarly difficult to know how to build out your Salesforce instance to fully support your business and that's why you're considering Greener Pastures Consulting.*




**Metadata** is the Salesforce structure that represents your customers/prospects, your partners, your internal team and all the interactions (e.g. Orders or Tickets) between these entities. We'll help you understand what you build with quick-and-easy graphics, using standard Unified Modeling Language constructs. In salesforce, the data definition metadata (**object**) is but one of the metadata structures available to be customized - the basic view/edit (**page layouts**); the grouping of objects to support a function (**applications**); the guidance provided on progressing an object through its lifecycle (**path assistant**), are all other examples. Now how do you get those changes into your org?

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# *Pitfall - Making Changes Directly in Production*

**Driver:** Urgent changes are required to capture new types of data. You're not given adequate time to determine whether this is a new value for a picklist, a new field on and existing object or a new object entirely!!

**Solution:** Create a Sandbox and make your changes there. Test them first. Demo them to your stakeholders. Then apply them to production using the right deployment strategy. By creating a sandbox and testing them first locally, you avoid making changes you regret and having to unwind them without fundamentally breaking your business. There are certain things you can change directly in production without impacting your data model OR your operations (e.g. creating new reports)

Now to get your changes into production. Here's my rule-of-thumb. If you have one object and fewer than 5 fields you need to get into production OR if you're on professional edition, go ahead and use change Set.

# *Solution - Sandbox-based Deployment*

**Change-set Development**

Professional Edition only

OR fewer than 5 fields and 1-2 objects

Manually intensive addition of change set components

Admin skills only

**Org-based Development**

Enterprise+

Multiple meta-elements

Ad-hoc definition of package elements in package xml

Developer skills

**Package Development**

Dev Hub Enabled

Highly complex application with multiple coupling points

Persistent (source controlled) composition of package

Technical Architect skills