

Salesforce DevOps Center

Getting Started Guide

DevOps Center is an improvement from Change Sets

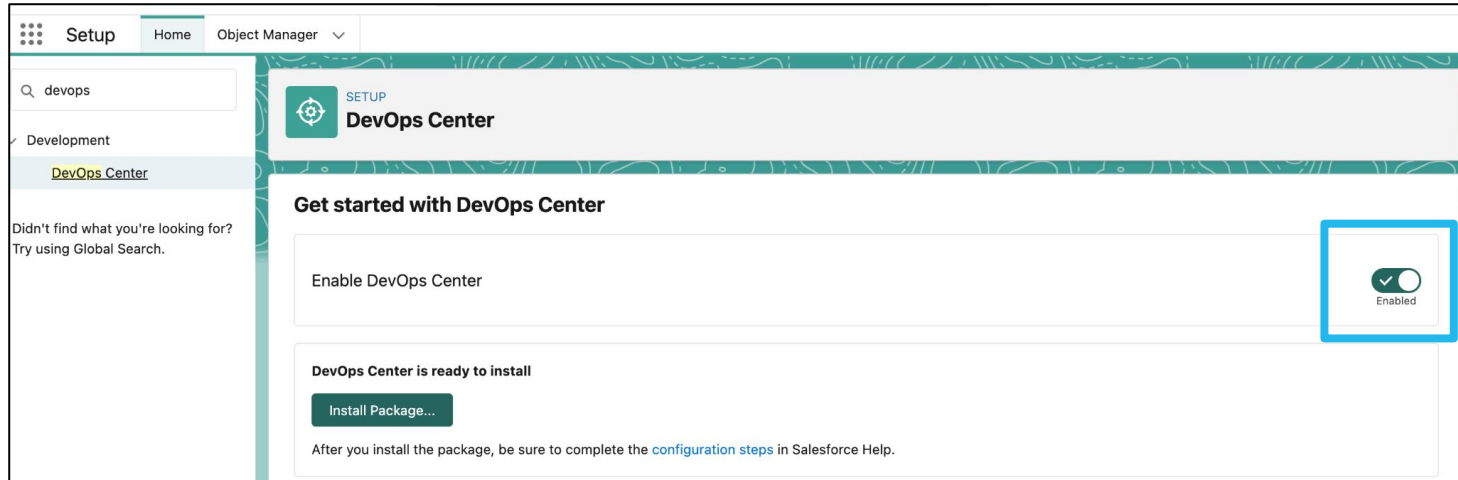
- Historically, Salesforce Developers have been limited to using Change Sets when deploying updates
- With the release of DevOps Center, there is now a superior option which makes the change/release management process much easier to maintain
- The version control and seamless collaboration between Developers and Administrators means:
 - Faster deployments
 - Better quality releases
 - Fewer errors
 - Iterative releases that can be rolled back if needed

DevOps Center is an improvement from Change Sets

	Change Sets	DevOps Center
Version Control (which can be used as backup)	✗	✓
Visibility of Release Pipeline and all changed metadata	✗	✓
Add multiple changes at once	✗	✓
Seamless collaboration between Devs & Admins	✗	✓
Lightning UI Experience	✗	✓
Keeps Environments in Sync	✗	✓
Fast/Scalable Deployments	✗	✓

Steps to Enable DevOps Center

- Go to setup and search for DevOps Center and toggle **Enable** button and Install required managed package to start using DevOps Center.



The screenshot shows the Salesforce Setup interface. In the left-hand navigation pane, a search bar contains the text "devops". Below the search bar, a list of search results is shown, with "DevOps Center" selected and highlighted. The main content area is titled "SETUP DevOps Center" and features a section titled "Get started with DevOps Center". Within this section, there is a card labeled "Enable DevOps Center" which contains a toggle switch. The toggle switch is currently in the "On" position, indicated by a checkmark and the word "Enabled" below it. This toggle switch is highlighted with a blue rectangular box. Below the "Enable DevOps Center" card, there is another card titled "DevOps Center is ready to install" which includes a green button labeled "Install Package...". At the bottom of this card, there is a note: "After you install the package, be sure to complete the [configuration steps](#) in Salesforce Help."

Install Managed Package

- Once DevOps Center is enabled, there is button on the same page to **Install Package**. It is a managed package offered by Salesforce which is mandatory to have.
- Note that installation may take a few minutes to complete

Upgrade DevOps Center
By Salesforce

i An earlier version is installed. It can be upgraded while preserving the existing data.
Installed: 5.3.0 (5.3) New Version: 5.3.0 (5.3)

Install for Admins Only Install for All Users Install for Specific Profiles...

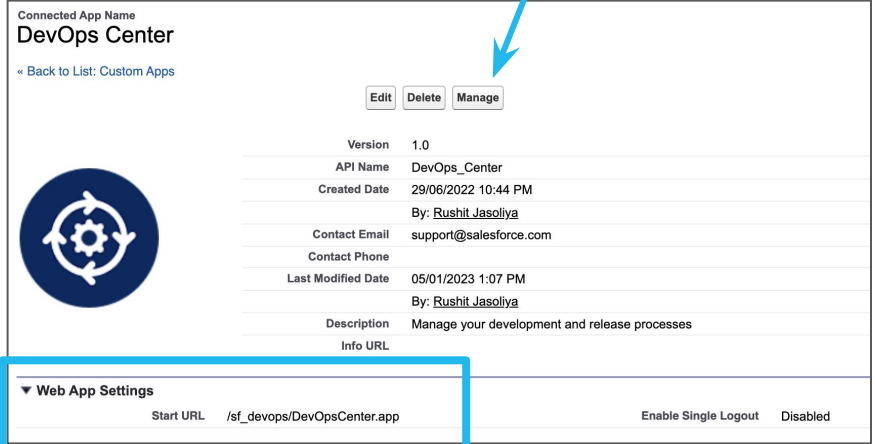
Upgrade **Cancel**

App Name	Publisher	Version Name	Version Number
DevOps Center	Salesforce	5.3.0	5.3

Additional Details [View Components](#)

Connected App

- Create new Connected App from the App Manager and set the start URL as link of DevOps Center app
- Once created, assign permission set to this newly created Connected App by clicking on **Manage** button
- Scroll down to permission set section and assign **sf_devops_NamedCredentials** permission set



Connected App Name
DevOps Center

◀ Back to List: Custom Apps

[Edit](#) [Delete](#) [Manage](#)

Version 1.0

API Name DevOps_Center

Created Date 29/06/2022 10:44 PM

By: [Rushit Jasoliya](#)

Contact Email support@salesforce.com

Contact Phone

Last Modified Date 05/01/2023 1:07 PM

By: [Rushit Jasoliya](#)

Description Manage your development and release processes

Info URL

▼ Web App Settings

Start URL /sf_devops/DevOpsCenter.app

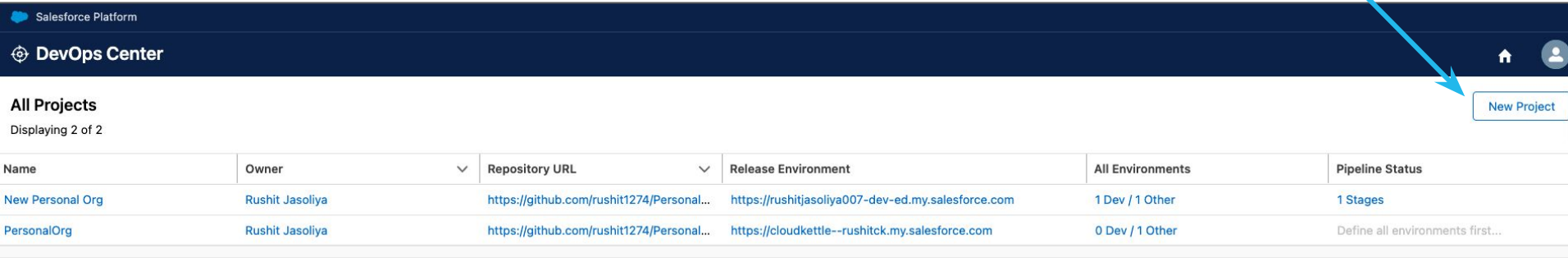
Enable Single Logout Disabled

Permission Set Assignment

Permission Set Name	Description	Assigned User
DevOps Center	Base Permission Set	All DevOps Center users
DevOps Center Manager	To setup Project, Environments & Users	Project Managers
DevOps Center Release Manager	Perform promotions through the pipeline	Release Managers
sf_devops_InitializeEnvironments	Manage connections to work environments	Project Managers
sf_devops_NamedCredentials	Grant access to the named credential needed to authenticate to environments	All DevOps Center users

Create Project in DevOps Center

- Upon completion of these steps, DevOps center should be ready to use
- From App Launcher, search for DevOps Center and Launch the App
- On Top Right corner there will be **New Project** button to set up new project.
- All Projects in Org will be visible on this screen (*note: there is no filter criteria yet for the list view*)

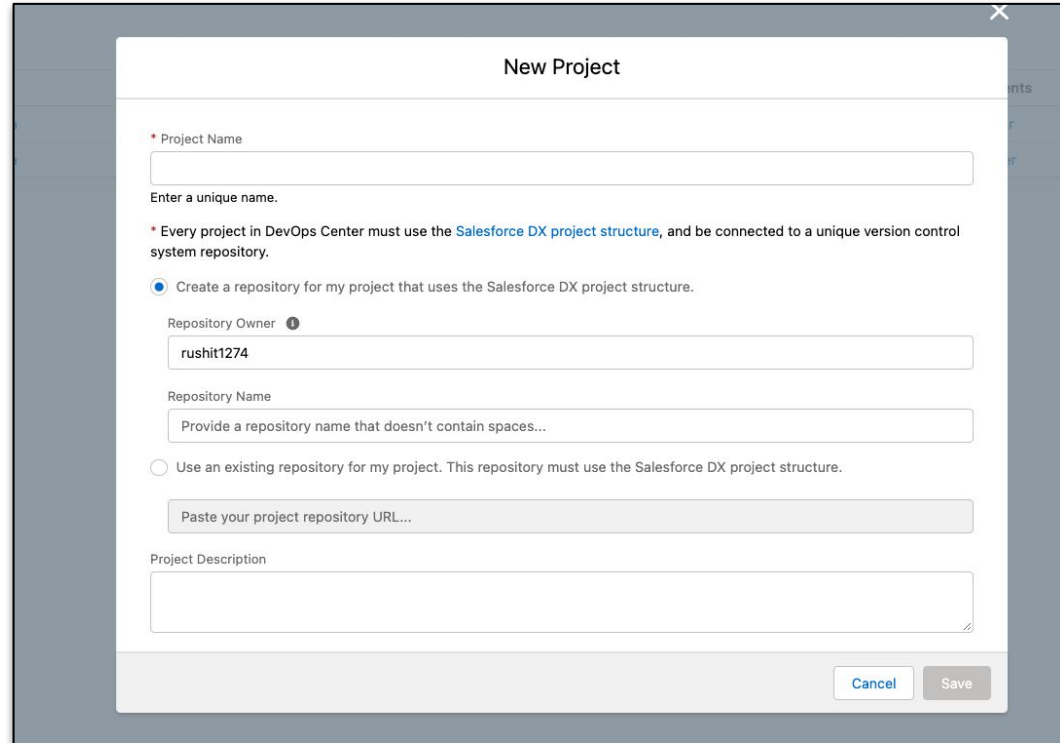


The screenshot shows the Salesforce DevOps Center interface. At the top, there is a dark blue header with the Salesforce Platform logo and the text 'Salesforce Platform'. Below this, the 'DevOps Center' logo is visible. On the right side of the header, there are icons for home and user profile, and a 'New Project' button. A blue arrow points to this button. Below the header, the main content area is titled 'All Projects' and shows 'Displaying 2 of 2' projects in a table.

Name	Owner	Repository URL	Release Environment	All Environments	Pipeline Status
New Personal Org	Rushit Jasoliya	https://github.com/rushit1274/Personal...	https://rushitjasoliya007-dev-ed.my.salesforce.com	1 Dev / 1 Other	1 Stages
PersonalOrg	Rushit Jasoliya	https://github.com/rushit1274/Personal...	https://cloudkettle--rushitck.my.salesforce.com	0 Dev / 1 Other	Define all environments first...

Create New Project

- The first time, GitHub authentication must be completed
- Other required details are Project Name, Repository Name (New/Existing), Project Description
- In the current version, there is no way to hide or delete projects, so avoid creating unnecessary/test projects as much as possible



The screenshot shows a 'New Project' dialog box with the following fields and options:

- Project Name:** A required text input field with the placeholder 'Enter a unique name.'
- Repository Options:** Two radio button options. The first is selected: 'Create a repository for my project that uses the Salesforce DX project structure.'
- Repository Owner:** A text input field containing 'rushit1274'.
- Repository Name:** A text input field with the placeholder 'Provide a repository name that doesn't contain spaces...'.
- Existing Repository:** An unselected radio button option: 'Use an existing repository for my project. This repository must use the Salesforce DX project structure.'
- Repository URL:** A text input field with the placeholder 'Paste your project repository URL...'.
- Project Description:** A large text area for describing the project.
- Buttons:** 'Cancel' and 'Save' buttons at the bottom right.

Add New Environments

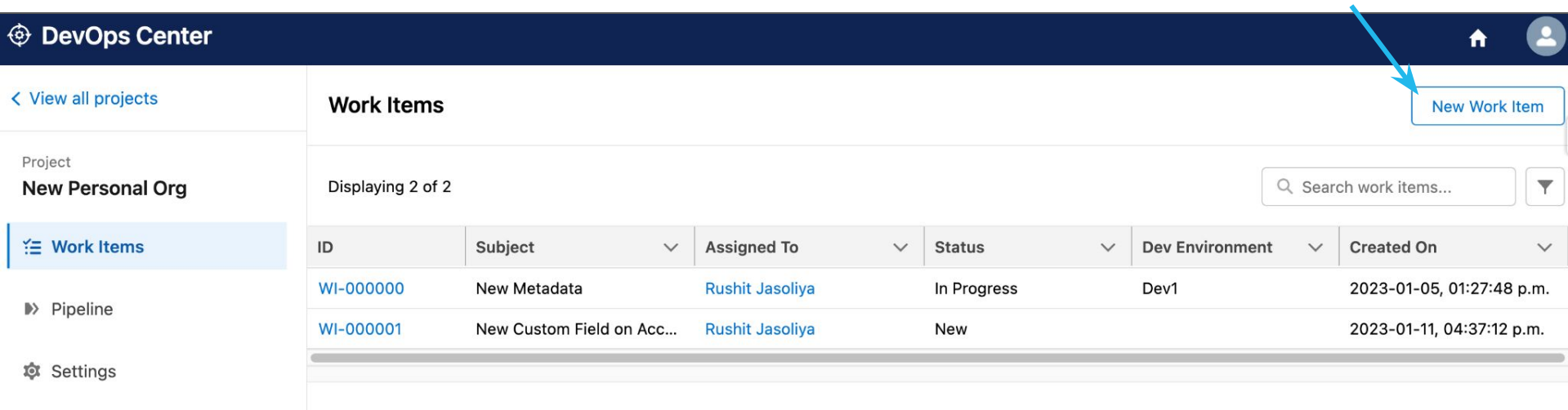
- The next step is to add environment in the pipeline. (Multiple Development Environments can be added.)
- At least one stage should be there after Deployment Environments

The screenshot displays the DevOps Center interface for a pipeline named 'PersonalOrg'. The left sidebar contains navigation options: 'View all projects', 'PersonalOrg', 'Work Items', 'Pipeline' (highlighted), and 'Settings'. The main content area is titled 'Pipeline' and has two tabs: 'Environments' (active) and 'Activity History'. A status indicator shows 'Not Ready' with an 'Activate' button. The pipeline configuration is visualized as a sequence of stages:

- Development Environments:** A box containing an 'Add Development Environment' button.
- Stage 1:**
 - Stage Name: UAT
 - Environment: PersonalOrg Release (cloudkettle--rushitck.my.salesforce.com)
 - Branch: Branch not set (Specify Branch... button)
 - Option: This is the bundling stage
- Stage 2:**
 - Stage Name: Production
 - Environment: PersonalOrg Release (cloudkettle--rushitck.my.salesforce.com)
 - Branch: Existing branch main (Edit Branch... button)
 - Option: No bundling stage in this pipeline

List of Work Items

- DevOps Center has same interface as List view for Work Item list, but it does not have list view actions. *Note that in the current version, Work Items cannot be deleted once created.*
- Navigate to **Work Item** tab on left side panel and click on **New Work Item** button to create new record



The screenshot displays the DevOps Center interface. The top navigation bar includes the 'DevOps Center' logo, a home icon, and a user profile icon. The left sidebar contains navigation options: 'View all projects', 'Project New Personal Org', 'Work Items' (selected), 'Pipeline', and 'Settings'. The main content area is titled 'Work Items' and shows 'Displaying 2 of 2' items. A search bar and a dropdown menu are located in the top right of the main area. A blue arrow points to the 'New Work Item' button in the top right corner.

ID	Subject	Assigned To	Status	Dev Environment	Created On
WI-000000	New Metadata	Rushit Jasoliya	In Progress	Dev1	2023-01-05, 01:27:48 p.m.
WI-000001	New Custom Field on Acc...	Rushit Jasoliya	New		2023-01-11, 04:37:12 p.m.

Create a new Work Item

- Work Item has only 3 fields in current version and can be used as User Story

New Work Item

* Subject: New Custom Field on Account

Description: Salesforce Sans 12 [Color Picker] [B] [I] [U] [Link] [List] [List] [List] [List]

Assigned To: [User Icon] Rushit Jasoliya [X]

[Cancel] [Save]

Work Item Stages

- On **New** stage, specify where work is taking place:
 - Develop from Salesforce platform -> then select Development Environment that was connected earlier OR
 - Develop & commit the work from feature branch outside of DevOps Center
- Feature branch gets created automatically with same name as Work Item

WI-000001

New Custom Field on Account

New In Progress In Review Ready to Promote Promoted Closed

Details **Changes** Activity History

How would you like to work?

I want to develop and commit my changes to the work item feature branch from DevOps Center using a connected development environment.

I want to develop and commit my changes to the work item feature branch from outside of DevOps Center.

Dev1

Proceed

New Custom Field on Account

- To add metadata changes to Work Item there are 2 options:
 - Pull Changes button - it will pull all the modified changes from the development environment
 - Add Components Manually - select components manually and add to Work Item

WI-000001 Create Review

New Custom Field on Account

In Progress | In Review | Ready to Promote | Promoted | Closed

Details Changes Activity History

Development Environment
Dev1 (change...)

0 files available to pull
3 files pulled

<input checked="" type="checkbox"/> File Name	Metadata Type	Operation	Last Modified By	Modified On
<input checked="" type="checkbox"/> Admin	Profile	CHANGE	Rushit Jasoliya	11-Jan-2023
<input checked="" type="checkbox"/> Account.Test_Acc__c	CustomField	ADD	Rushit Jasoliya	11-Jan-2023
<input checked="" type="checkbox"/> Account-Account Layout	Layout	CHANGE	Rushit Jasoliya	11-Jan-2023

* Comment
Created a new field on the Account

Source Control Branch
<https://github.com/rushit1274/PersonalOrg/tree/WI-000001>

Create Review

- After metadata component is committed, the **Create Review** button is Enabled in the top right corner
- On click of **Create Review**, the Work Item moves to In Review Stage
- In the back-end a pull request is created



WI-000000

New Metadata

Create Review

✓ In Progress In Review Ready to Promote Promoted Closed

Details Changes Activity History

The screenshot shows a work item interface for 'WI-000000' with the title 'New Metadata'. A 'Create Review' button is located in the top right corner, indicated by a blue arrow. Below the button is a progress bar with six stages: 'New Metadata' (green with a checkmark), 'In Progress' (dark blue), 'In Review' (light grey), 'Ready to Promote' (light grey), 'Promoted' (light grey), and 'Closed' (light grey). At the bottom, there are three tabs: 'Details', 'Changes' (which is selected and underlined), and 'Activity History'.

Pipeline Promotion

- After Creating a pull request, it can be marked as **Ready to Promote**
- This will make this Work Item available to promote to next environment in the pipeline

WI-000000
New Metadata


Ready to Promote [View Change Request](#)



Details Changes Activity History

WI-000000
New Metadata

Ready to Promote [View Change Request](#)



Details Changes Activity History

Promote the Work Item



- Last step is to Promote the Work Item
- Multiple Work Items can be bundled in single promotion and moved to next environment

Pipeline


Stages Environments Activity History

Approved Work Items

[Promote Selected →](#)

WI-000001  
New Custom Field on Account

Production



No unpromoted changes in Production

Closed Stage

- Once successfully promoted, Work Item automatically moves to Closed stage

WI-000001
New Custom Field on Account



Details Changes Activity History

The image shows a horizontal progress bar for a work item. It consists of five green segments, each containing a white checkmark and a white chevron pointing to the right. The final segment on the right is dark blue and labeled 'Closed'. Below the progress bar, there are three tabs: 'Details', 'Changes' (which is underlined), and 'Activity History'.

Notes and Considerations

- This is a new tool, and additional features are still in development
- Currently the only supported provider is Github. *(Bitbucket, Azure & Gitlab will be available in the near future, but no firm dates yet)*
- DevOps Center is not supported in Classic Environments
- Integration with ticketing systems like Jira/Azure not yet possible
- There is a [GitHub RoadMap](#) for Salesforce DevOps Center
- Even with somewhat limited functionality, DevOps Center marks a massive improvement over Change Sets