Salesforce DevOps Center

Getting Started Guide

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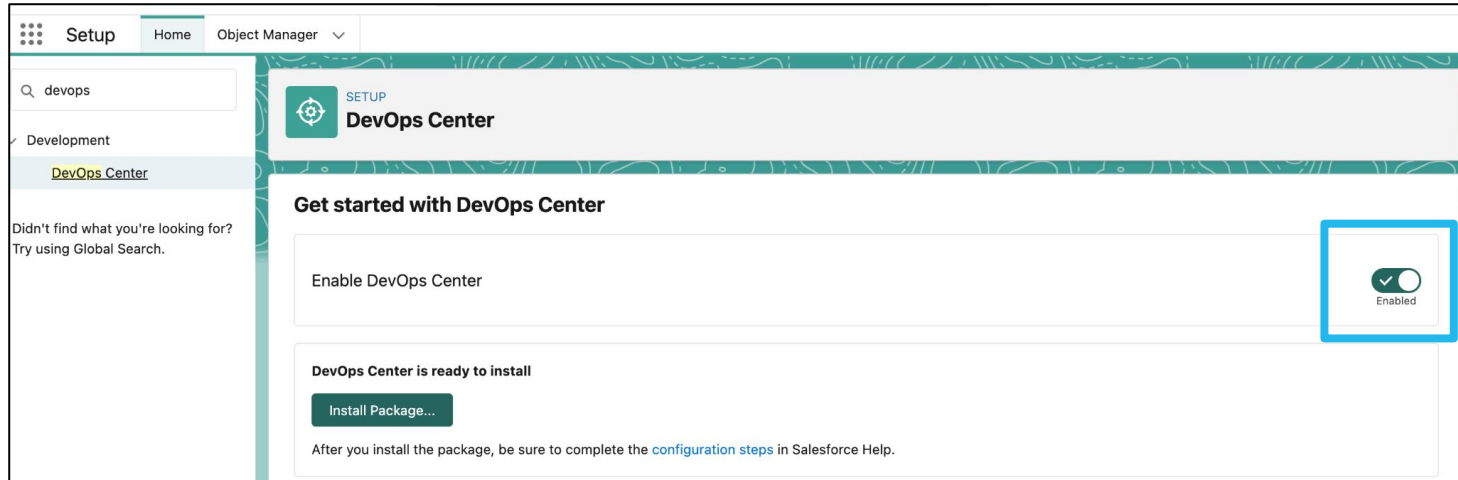
DevOps Center is an improvement from Change Sets

- 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

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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	❌	✔️

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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.

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
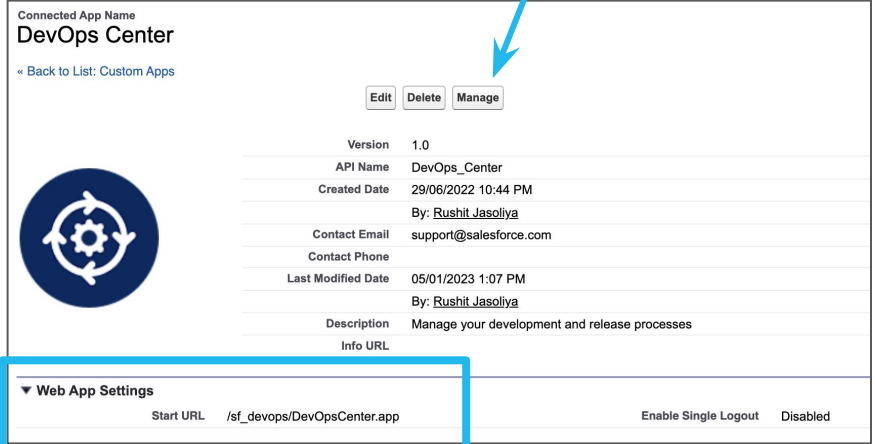
Connected App

- 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
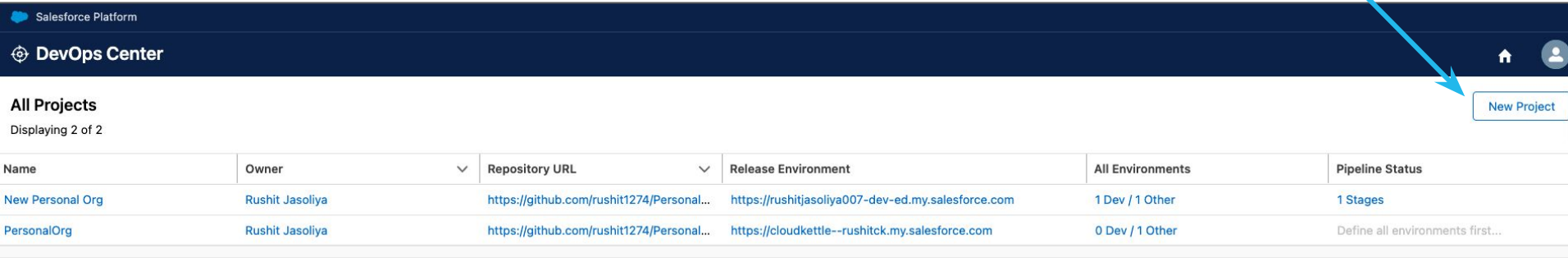
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Permission Set Assignment

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

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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*)

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

New Project

* Project Name

Enter a unique name.

* Every project in DevOps Center must use the Salesforce DX project structure, and be connected to a unique version control system repository.

◉ Create a repository for my project that uses the Salesforce DX project structure.

Repository Owner ⓘ

rushit1274

Repository Name

Provide a repository name that doesn't contain spaces...

◯ Use an existing repository for my project. This repository must use the Salesforce DX project structure.

Paste your project repository URL...

Project Description

Cancel   Save

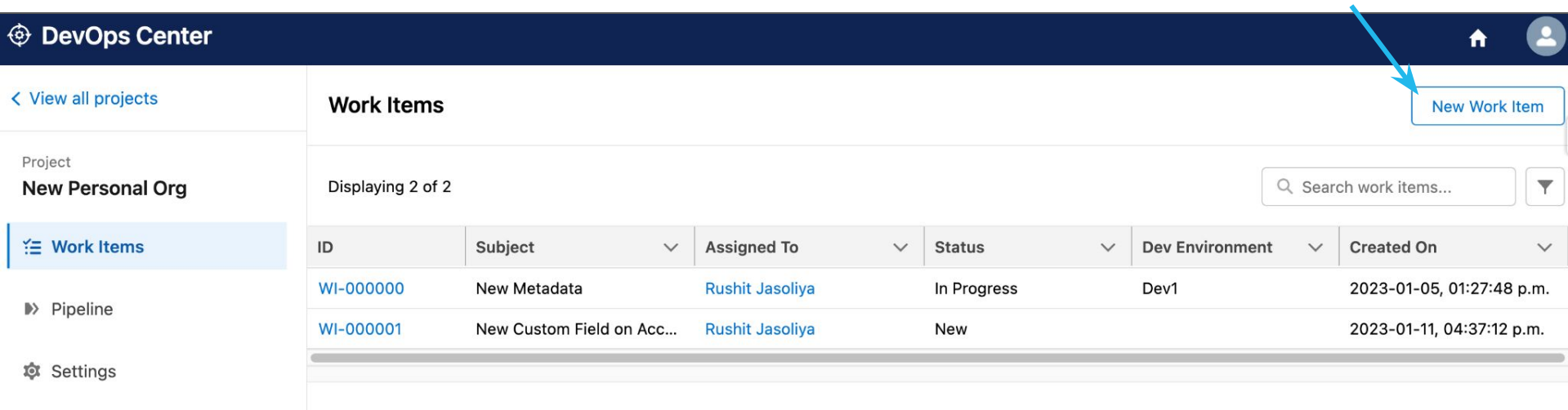CloudKettle

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

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

Create a new Work Item

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

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

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

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

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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**

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

Details | Changes | Activity History

WI-000000
New Metadata

Ready to Promote ✓ | **View Change Request**

| ✓ | ✓ | ✓ | Ready to Promote | Promoted | Closed |

Details | Changes | Activity History

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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

Closed Stage

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

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

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