SALESFORCE PLATFORM DELIVERY TEAM:

KNOWLEDGE ARTICLE:

Informational Document -SOP

Title	Concierge Deployment Pipeline
URL Name	

Summary
The purpose of this document is to describe *best practices* used for case management and migration of Salesforce SERVICE REQUESTS deployments into Concierge.

Details

The following process describes the steps required to deploy Service Request modifications into Concierge.

GENERAL NOTES

Once A Case is Assigned:

- Review the Business Requirements provided by either the requester or the BA.
- Determine if there are enough details to execute the requested service request.
- Verify if there are any **RELATED** service records that need to be considered. Be aware if this is a "child" case.

Communicate with the requestor and/or BA:

- As you continue to work on the case, be sure to update the case **FEED** with any status or "blockers". This will help others understand what progress has been made on the case.

DEPLOYMENT PROCESS:

(Step 1) DEV CHANGE

1. Create a change request in Salesforce and **RELATE** it to the case you are working on.
2. As you are building or modifying in Salesforce, be sure to document your changes in the Implementation Plan section of the Change Request as this is where you document everything that needs to be done in Salesforce for the Service Request item.
3. Determine what **IMPACT** this case will have (you may need to keep this updated).

(Step 2) PEER REVIEW

1. Before the Dev work is ready for check-in, a Peer Review needs to be requested from one of the Salesforce Administrators within your team.
2. The peer reviewer will validate that the changes match the request and work as specified. Additionally, the reviewer will verify that the change does not negatively impact the current workflow.
3. Comments should be noted in Chatter for that case.

(Step 3) CHECK IN

1. Once the Dev work has been completed, the Salesforce Admin will create a "Draft Deployment" record in Gearset. This draft deployment record contains all the modifications created for that case and will be used to deploy the work/changes. These should also be reflected in the Implementation Plan section of your Change Request by adding the link to your draft deployment.
2. All editing changes that are being promoted to UAT and PROD need to follow the naming convention: change#_subject **(Example: c-23456_change subject)**

(Step 4) PIPELINE DEPLOYMENT

1. The Salesforce Admin case owner will open the *Change Request* and add the Gearset "Draft Deployment" link to the change request and promote to UAT after review.

(Step 5) PROMOTE TO UAT

1. Before the Salesforce Admin case owner promotes changes into the UAT environment, communication to other Salesforce Admin's is required.
2. The assigned Salesforce Admin for that case will notify the REQUESTOR or QA to begin the testing process.

NOTE: ONLY AgWest admins are allowed to enter modifications into UAT and/or PROD. All third-party DevOps work MUST provide complete instructions for the AgWest admin to complete the requested deployment.

(Step 6) USER TESTING

1. The requester or QA will provide **FEEDBACK** directly to the Salesforce Administrator responsible for that case based on the test results.
2. Any "Change Request" that has a MODIFICATON will return to the DEV environment and start back at Step 1.

(Step 7) CHANGE ACCPTANCE

1. Once testing has successfully been completed, documentation of emails and/or screenshots need to be added to the Change Request.
2. The "Change Request" that is APPROVED can be "**MARKED AS COMPLETE**" by the Pipeline Manager.

(Step 8) CHANGE CONTROL

1. The Change Manager will evaluate the **IMPACT** of each case and determine if a CAB review is required or if the minor change can pass through to production.

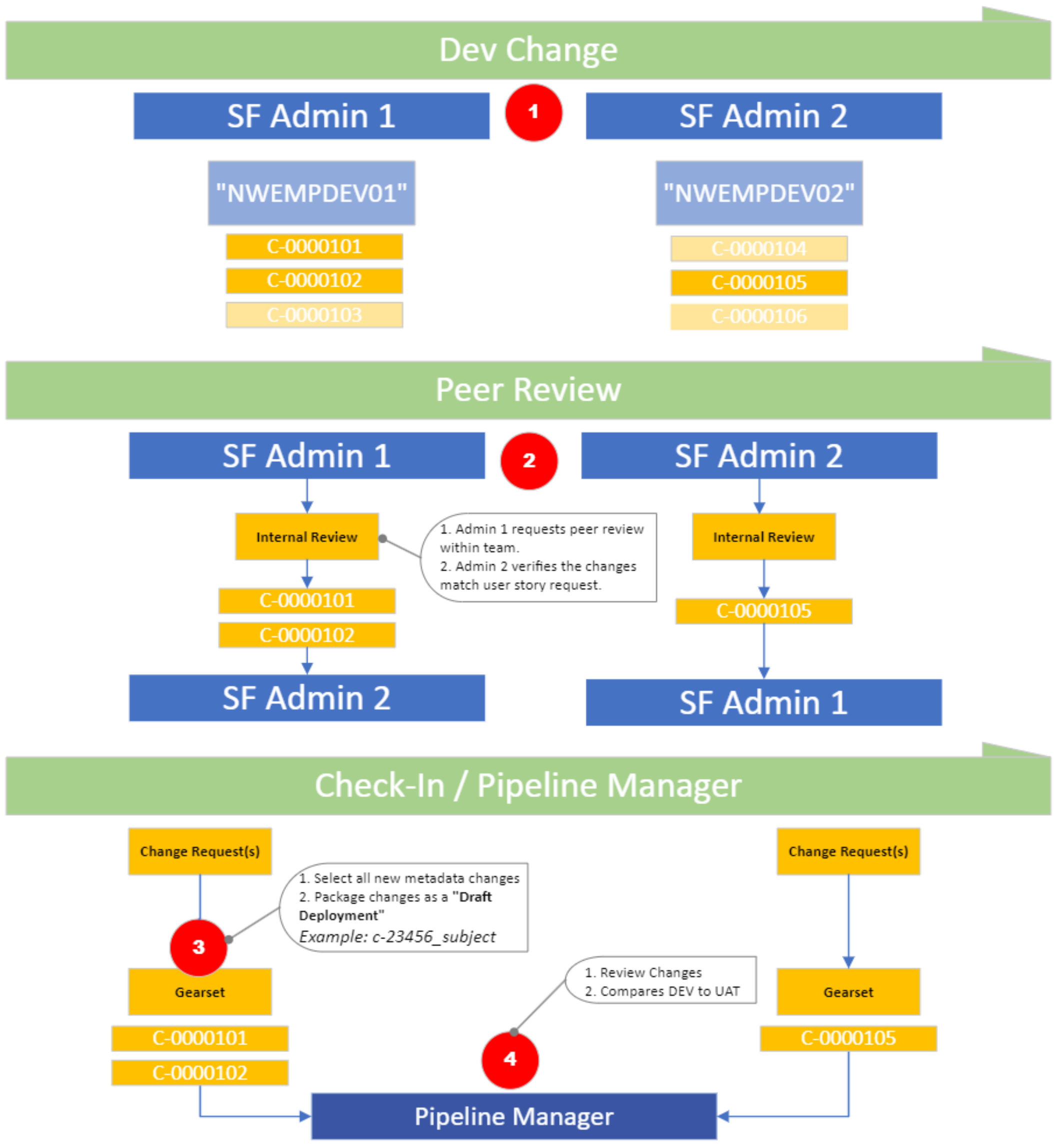
(Step 9) DEPLOY

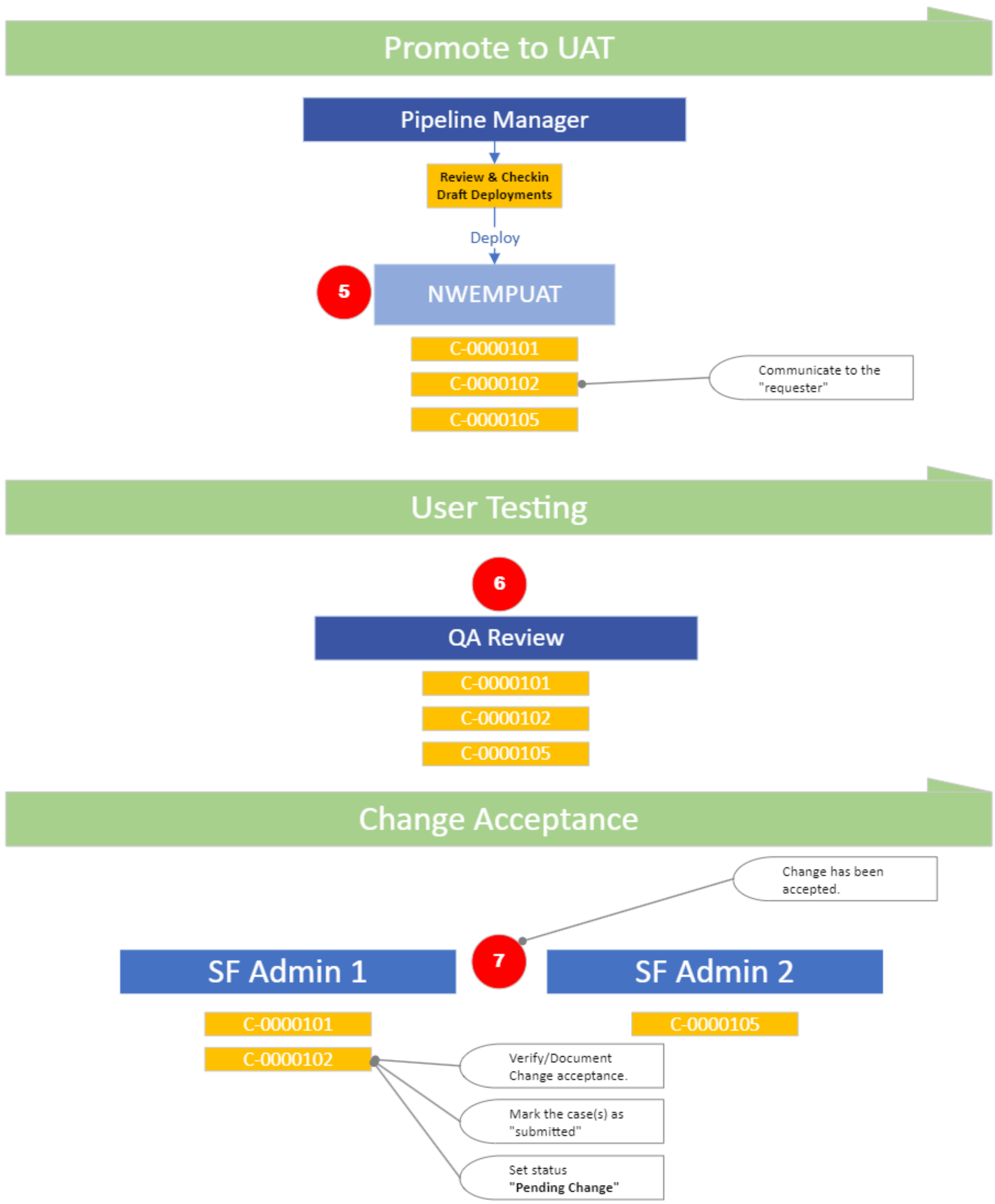
1. Once the case has been reviewed by Change Management and approved for production, the pipeline manager will **DEPLOY** all the changes.
2. The Pipeline Manager will promote the same Gearset “Draft Deployment” released to UAT for the PRODUCTION deployment.
3. **NOTE – NO PRODUCTION DEPLOYMENT WITHIN 5 DAYS OF ANY PTO OR HOLIDAY BEING OBSERVED BY THE PIPELINE MANAGER.**

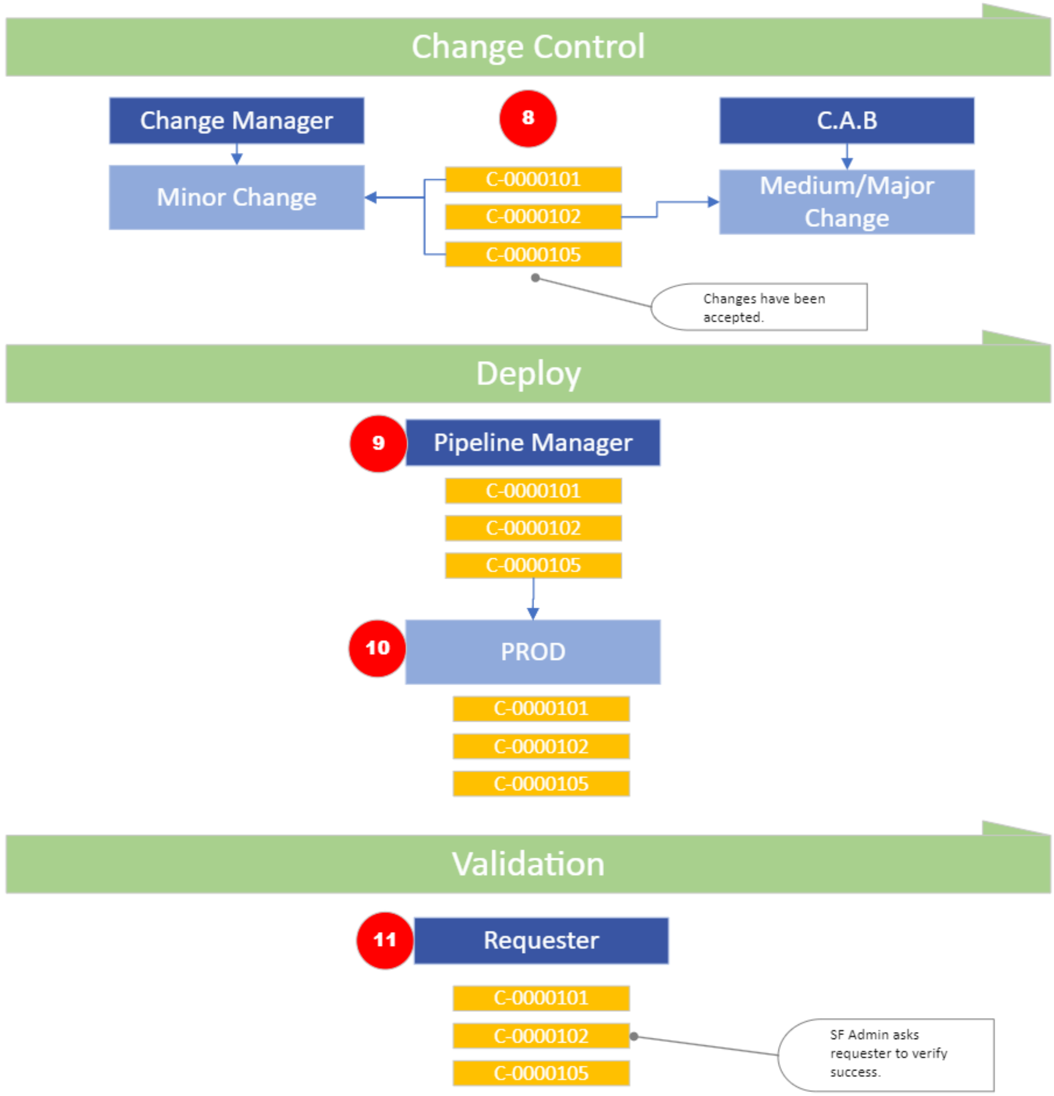
(Step 10) PRODUCTION DEPLOYMENT

(Step 11) VALIDATION/CLOSE CASE

1. Once the assigned Salesforce Administrator has verified that the deployment works as specified, they will ask the original requester to verify the success of the deployment as well.
2. “IF” there is an issue with the release, a remediation and PIR will be executed.
3. "IF” the case is successfully deployed and verified, it can be **CLOSED.** This requires both the resolution **CODE** and **DESCRIPTION** to be completed.


Dev Change
SF Admin 1
1
SF Admin 2
"NWEMPDEV01"
C-0000101
C-0000102
C-0000103
"NWEMPDEV02"
C-0000104
C-0000105
C-0000106
Peer Review
SF Admin 1
2
SF Admin 2
Internal Review
1. Admin 1 requests peer review within team.
2. Admin 2 verifies the changes match user story request.
Internal Review
C-0000101
C-0000102
C-0000105
SF Admin 2
SF Admin 1
Check-In / Pipeline Manager
Change Request(s)
1. Select all new metadata changes
2. Package changes as a "Draft Deployment"
Example: c-23456_subject
Change Request(s)
3
Gearset
1. Review Changes
2. Compares DEV to UAT
Gearset
C-0000101
C-0000102
4
C-0000105
Pipeline Manager


Promote to UAT
Pipeline Manager
Review & Checkin Draft Deployments
Deploy
5
NWEMPUAT
C-0000101
C-0000102
C-0000105
Communicate to the "requester"
User Testing
6
QA Review
C-0000101
C-0000102
C-0000105
Change Acceptance
Change has been accepted.
SF Admin 1
7
SF Admin 2
C-0000101
C-0000102
C-0000105
Verify/Document Change acceptance.
Mark the case(s) as "submitted"
Set status "Pending Change"



Change Control
Change Manager
8
C.A.B
Minor Change
C-0000101
C-0000102
C-0000105
Medium/Major Change
Changes have been accepted.
Deploy
9
Pipeline Manager
C-0000101
C-0000102
C-0000105
10
PROD
C-0000101
C-0000102
C-0000105
Validation
11
Requester
C-0000101
C-0000102
C-0000105
SF Admin asks requester to verify success.