

Transition to Guided Deployment

A resource for Prodlly Admins and Users

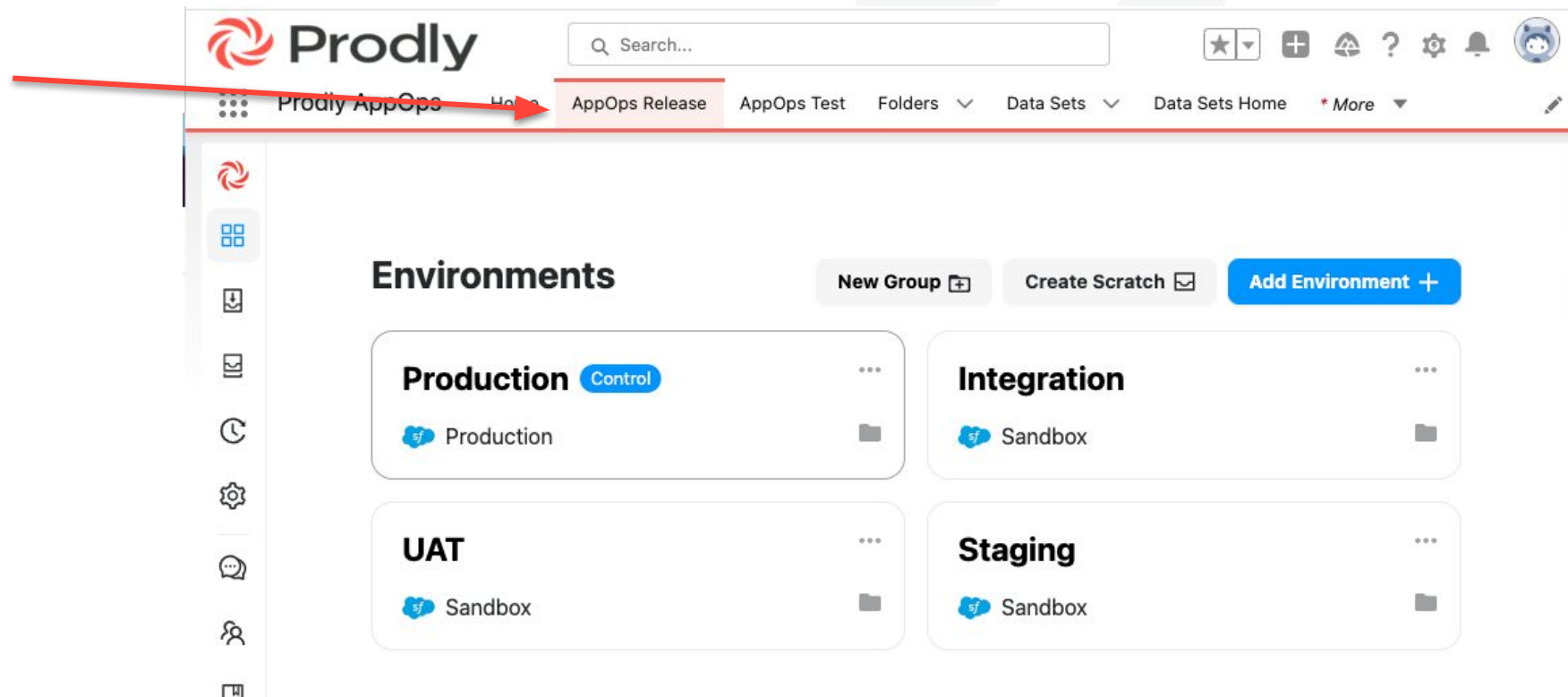


How Do I Learn More?

- [Deploy Data and Metadata with Guided Deployment](#)
- [Guided Deployment Vs. Deployment Center](#)
- Community: success.prodly.co

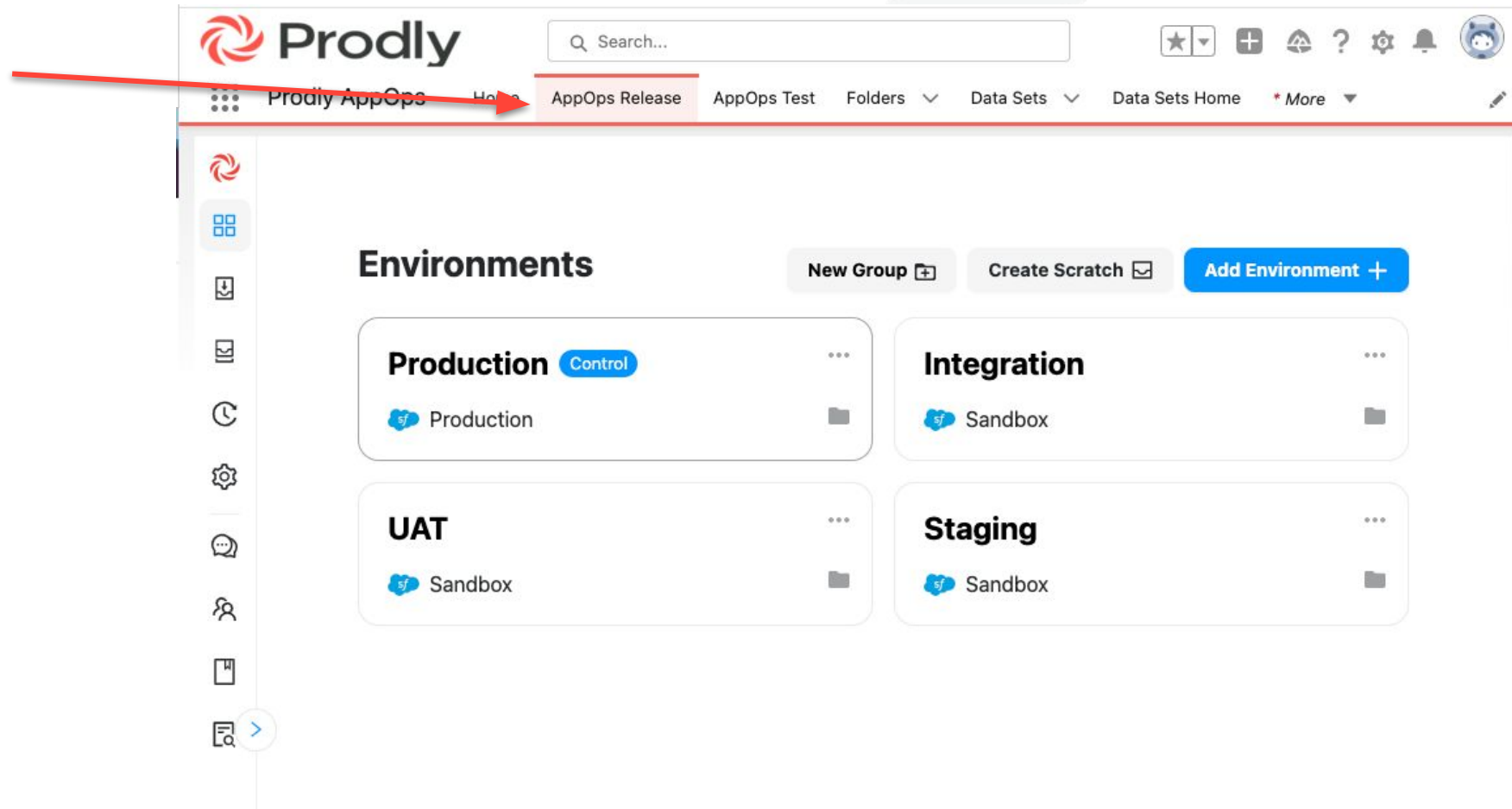
What's Changed?

- Guide Deployment has replaced Deployment Center
- Environments have replaced Connections
- Access to Prodlly deployments has moved to the AppOps Release tab



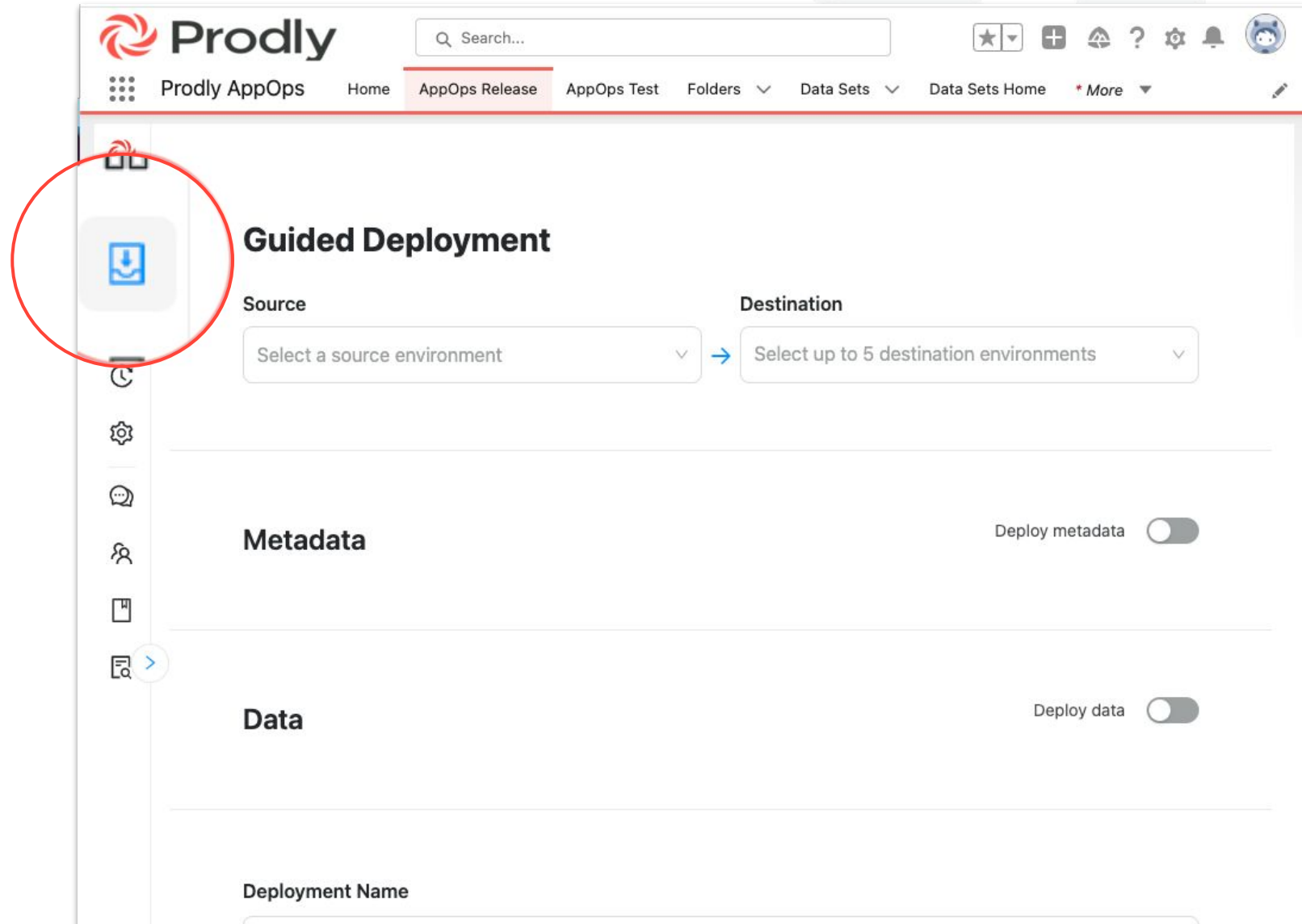
AppOps Release Tab: Central Place for All Things Prody

Manage Environments



Central Place for All Things Release Management

Deploy data and metadata



The screenshot displays the Prodlly AppOps interface. The top navigation bar includes the Prodlly logo, a search bar, and various utility icons. The main navigation menu lists 'Prodly AppOps', 'Home', 'AppOps Release' (highlighted), 'AppOps Test', 'Folders', 'Data Sets', 'Data Sets Home', and 'More'. The 'Guided Deployment' section is the primary focus, featuring a sidebar icon circled in red. The main content area includes a 'Source' dropdown menu with the text 'Select a source environment', a 'Destination' dropdown menu with the text 'Select up to 5 destination environments', and two toggle switches: 'Deploy metadata' and 'Deploy data', both currently turned off. A 'Deployment Name' field is partially visible at the bottom.

New Features

Guided Deployment makes managing
Salesforce releases easier than ever.

Preview Records Before Deploying

Preview Deployment

See how this deployment will impact the destination environment with a count of records to be processed in this deployment. Records are counted for root objects and may differ based on relationships.

[Preview Again ↻](#)

Product *product2* 107 records ● 107 ● 0

Records ⓘ ↻ Product *product2* [Clear Filters](#) ✕

Product Code	Active (Product)	Last Update By Alias	Created Date	Operation	103/107
POP-OT-1	true	HCoxo	2022-11-30T15:57:32.00...	● Update	<input type="checkbox"/>
POP-R-1	false	HCoxo	2022-11-30T15:57:32.00...	● Update	<input checked="" type="checkbox"/>
POP-R-2	false	HCoxo	2022-11-30T15:57:32.00...	● Update	<input type="checkbox"/>
POP-R-3	false	HCoxo	2022-11-30T15:57:32.00...	● Update	<input type="checkbox"/>
POP-R-4	false	HCoxo	2022-11-30T15:57:32.00...	● Update	<input checked="" type="checkbox"/>
POP-R-5	false	HCoxo	2022-11-30T15:57:32.00...	● Update	<input checked="" type="checkbox"/>
POP-R-6	false	HCoxo	2022-11-30T15:57:32.00...	● Update	<input type="checkbox"/>
POP-R-7	false	HCoxo	2022-11-30T15:57:32.00...	● Update	<input checked="" type="checkbox"/>

What Is It?

See the records that will be deployed before running a deployment.

Key Benefits

- Better insight into what records will be moved
- Choose specific records to deploy

Quickly Seed Sandboxes

Prodlly Search...

Prodly AppOps Home AppOps Release AppOps Test Folders Data Sets Data Sets Home * More

Seed Sandbox

Source Production → **Destination** Integration × UAT × Staging ×

Data Selection Method
 Create new data set Use existing deployment plan Use existing data set

Root Deployment Object
Account (Account)

Deployment Objects Show selected

Object (API Name)	Skip Relationships	4/25
Account (Account)	Select relationships to skip...	<input checked="" type="checkbox"/>
Case (Case)	Select relationships to skip...	<input checked="" type="checkbox"/>
Opportunity (Opportunity)	Select relationships to skip...	<input checked="" type="checkbox"/>
Opportunity Contact Role (OpportunityContactRole)	Select relationships to skip...	<input checked="" type="checkbox"/>

Ready to deploy? Temporarily deactivate events? Simulate Deploy

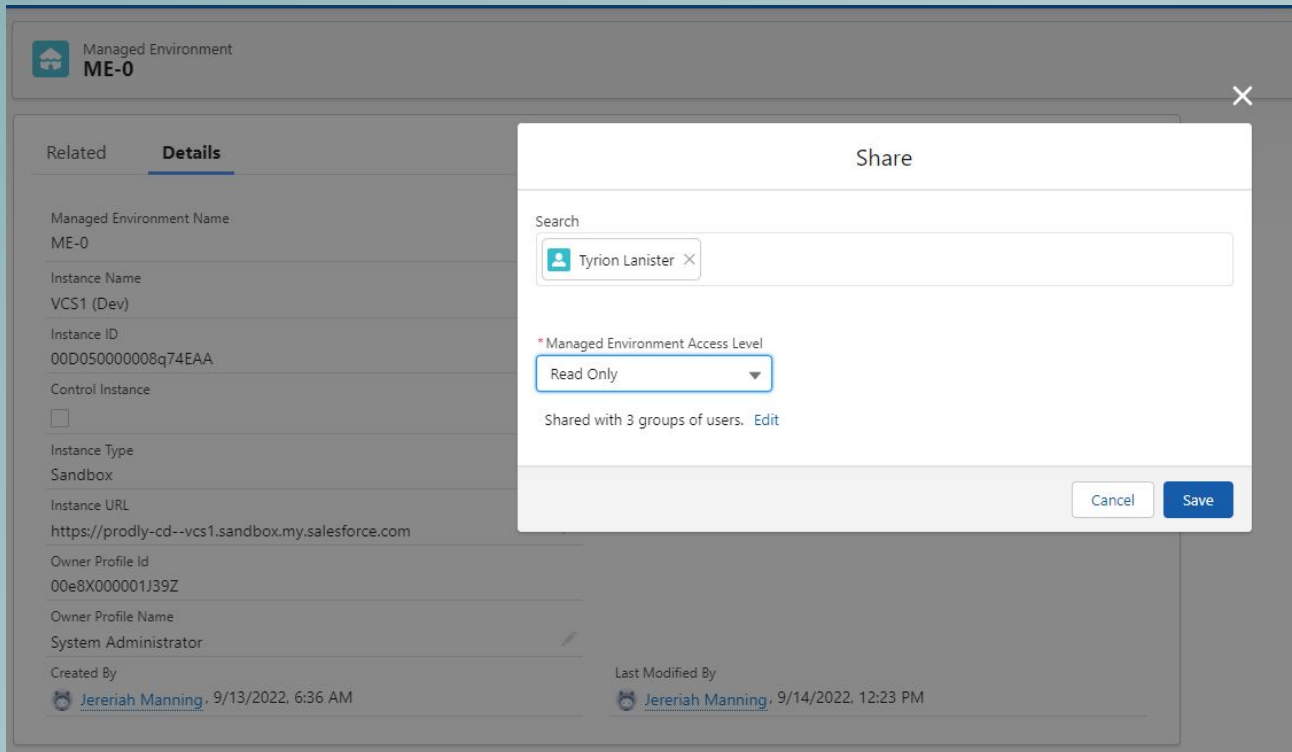
What Is It?

A fast way to move test data into lower level orgs.

Key Benefits

- Quickly select data to seed
- Temporarily deactivate events during deployment

Environment Access Control



What Is It?

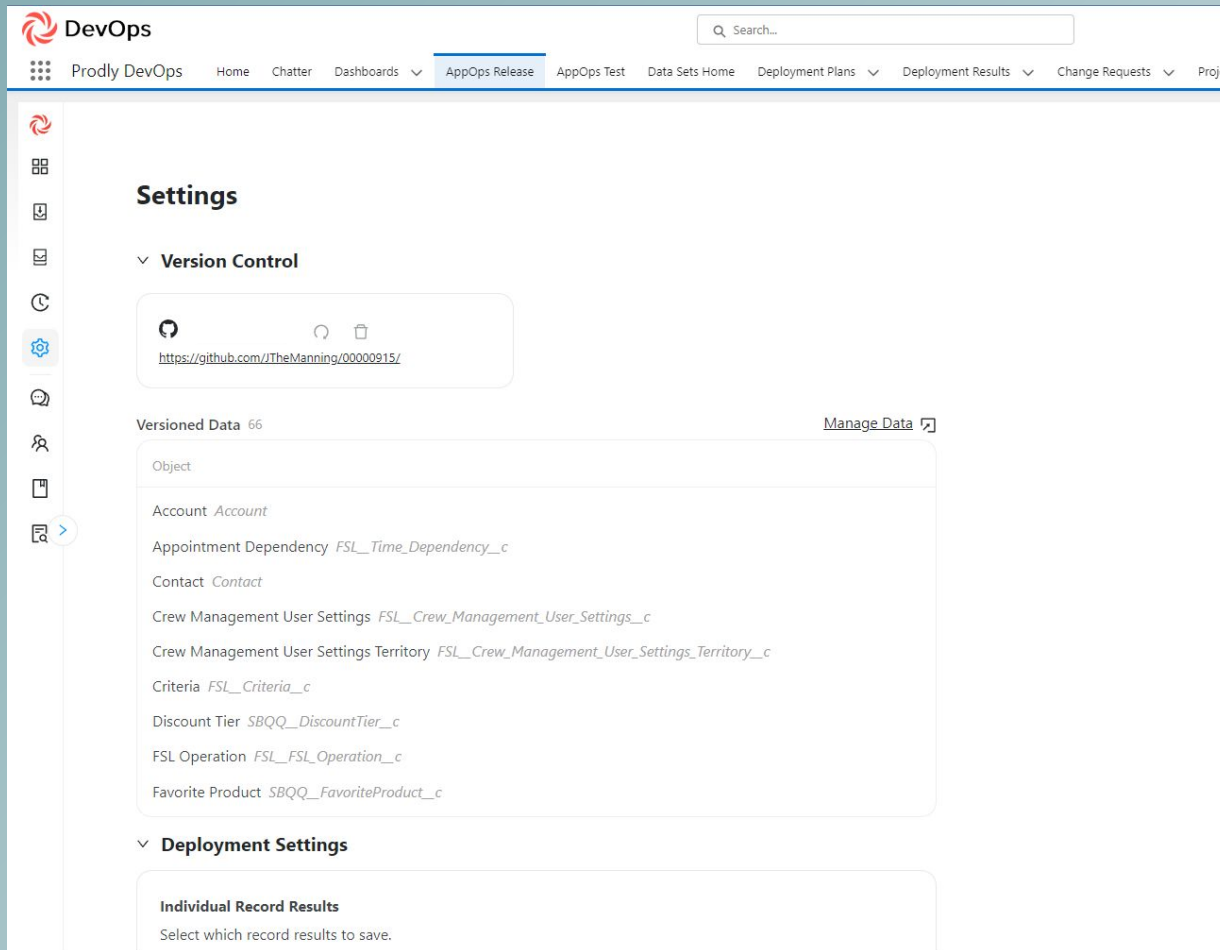
Admins can now restrict access to certain environments to better control who can deploy to what environments.

Key Benefits

- Better control to maintain deployment process
- Manage read, edit, and deletion permissions for each environment

Available in Plus and Enterprise editions

Version Control for Data



The screenshot displays the Prodlly DevOps interface. At the top, there is a search bar and a navigation menu with items like 'Prodlly DevOps', 'Home', 'Chatter', 'Dashboards', 'AppOps Release', 'AppOps Test', 'Data Sets Home', 'Deployment Plans', 'Deployment Results', 'Change Requests', and 'Proje'. The main content area is titled 'Settings' and features a 'Version Control' section. This section includes a GitHub repository link: <https://github.com/TheManning/00000915/>. Below this, there is a 'Versioned Data' section with a 'Manage Data' link and a list of objects: Account, Appointment Dependency, Contact, Crew Management User Settings, Crew Management User Settings Territory, Criteria, Discount Tier, FSL Operation, and Favorite Product. The 'Deployment Settings' section is partially visible at the bottom, showing 'Individual Record Results' with the instruction 'Select which record results to save.'

What is it?

Source-drive development for configuration data.

Key Benefits

- Tracking value changes of configuration data.
- Better manage the changes to your configuration data.

Jira Integration

Deployment Name

Deployment Notes

Jira

Select an issue to link it to this deployment.

- AA-1 Update Flow To Do
- AA-2 Update Price Rules In Progress
- AA-3 Update Products 11/12/22 Done

What Is It?

Associate Prodlly deployments to Jira issues.

Key Benefits

- Better Audit Capabilities
- Integrate work into your source of truth
- Easy access to the Jira issue from Prodlly

Available in Plus and Enterprise editions

Create Scratch Org with Clicks

Create a Scratch Org *Beta*

Active Scratch Orgs: 0 / 3 Daily Creation Allocation: 0 / 6

Name

New Scratch Org

Username

hcoxon@prodly.co

Source [Copy Dev Hub Org Id](#)

Production

Org Duration

7 days 30 days

Install Packages

Install Metadata

Install Data

[Cancel](#) **Create Scratch Org**

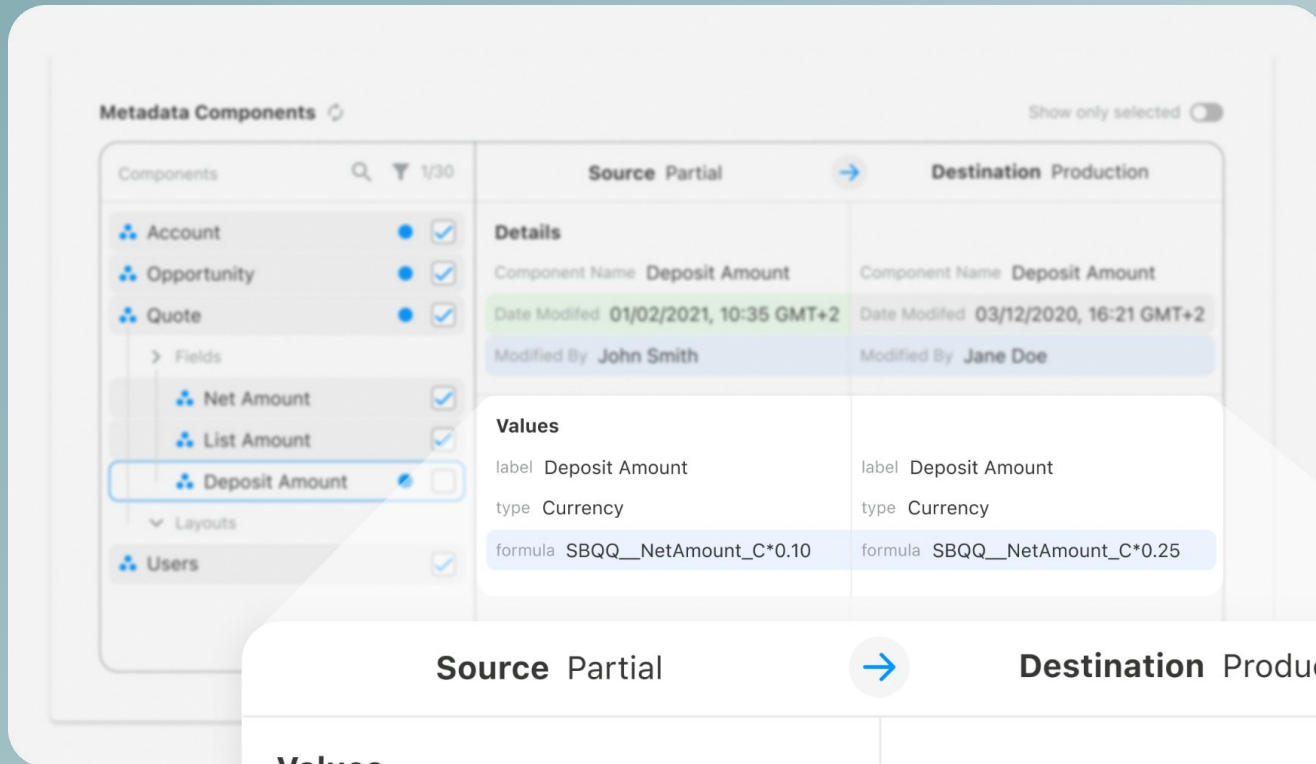
What Is It?

A declarative way to create scratch orgs for development.

Key Benefits

- Quickly create scratch environments with workable data.
- No need to code to create scratch orgs.

Compare and Deploy Metadata



What Is It?

Visual comparison of metadata differences between orgs.

Key Benefits

- Quickly find and select desired metadata.
- Validate metadata changes to be deployed.

Source Partial	Destination Production
Values	
label Deposit Amount	label Deposit Amount
type Currency	type Currency
formula SBQQ__NetAmount_C*0.10	formula SBQQ__NetAmount_C*0.25