



DevOps Center - Practical Use Cases

Salesforce
Marcus & Millichap
Elements.cloud



Meet our Speakers



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Forward-Looking Statements

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This presentation contains forward-looking statements about, among other things, trend analyses and future events, future financial performance, anticipated growth, industry prospects, environmental, social and governance goals, and the anticipated benefits of acquired companies. The achievement or success of the matters covered by such forward-looking statements involves risks, uncertainties and assumptions. If any such risks or uncertainties materialize or if any of the assumptions prove incorrect, Salesforce's results could differ materially from the results expressed or implied by these forward-looking statements. 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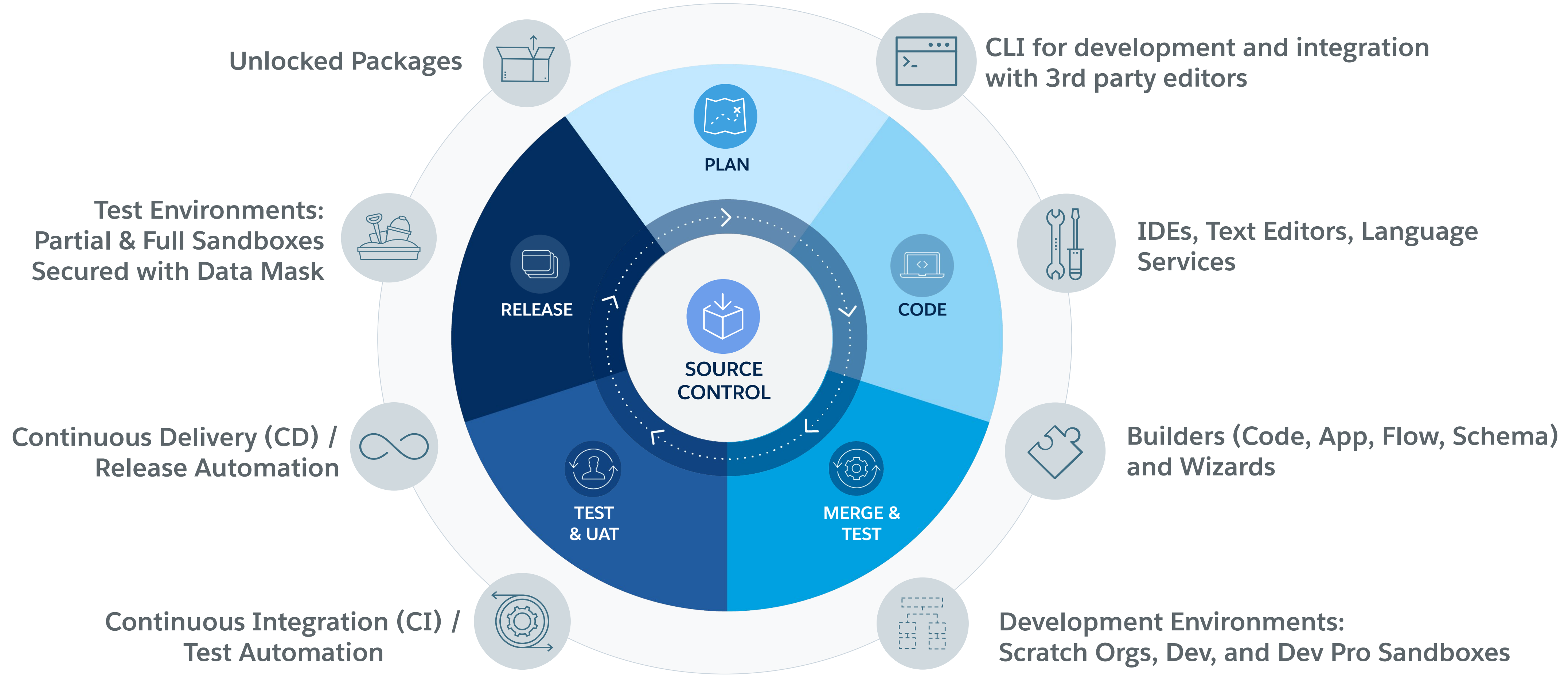
DevOps Center Overview

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Modern Application Lifecycle Management (ALM)

The fast, efficient, and trusted path to build on Salesforce



Salesforce DevOps

Bringing Modern Release Management and DevOps to All

Declarative Experience

Improved experience around Change and Release Management for Declarative/Admin Users

Hybrid/Fusion Teams

Team collaboration and compatibility to support all developer types (declarative and programmatic) across all functions (dev, release mgr, QA, biz stakeholder, etc)

Democratize DevOps

Democratization of modern best practices like Source Control, Testing, CI/CD

Platform Extensibility

Extensibility across Salesforce platforms - Lightning, Heroku, Mulesoft, Commerce, Mktg, and 3rd party ecosystem



Introducing DevOps Center

Modern change & release management
for everyone

Track changes with a modern UI

View, manage, and track changes as development
happens

Seamlessly integrate with version control

Collaborate with team members and orchestrate
changes between source control branches, and orgs

Move changes across environments with clicks

Migrate changes through development, review, test, and
production environments with confidence and ease

Work with hybrid teams

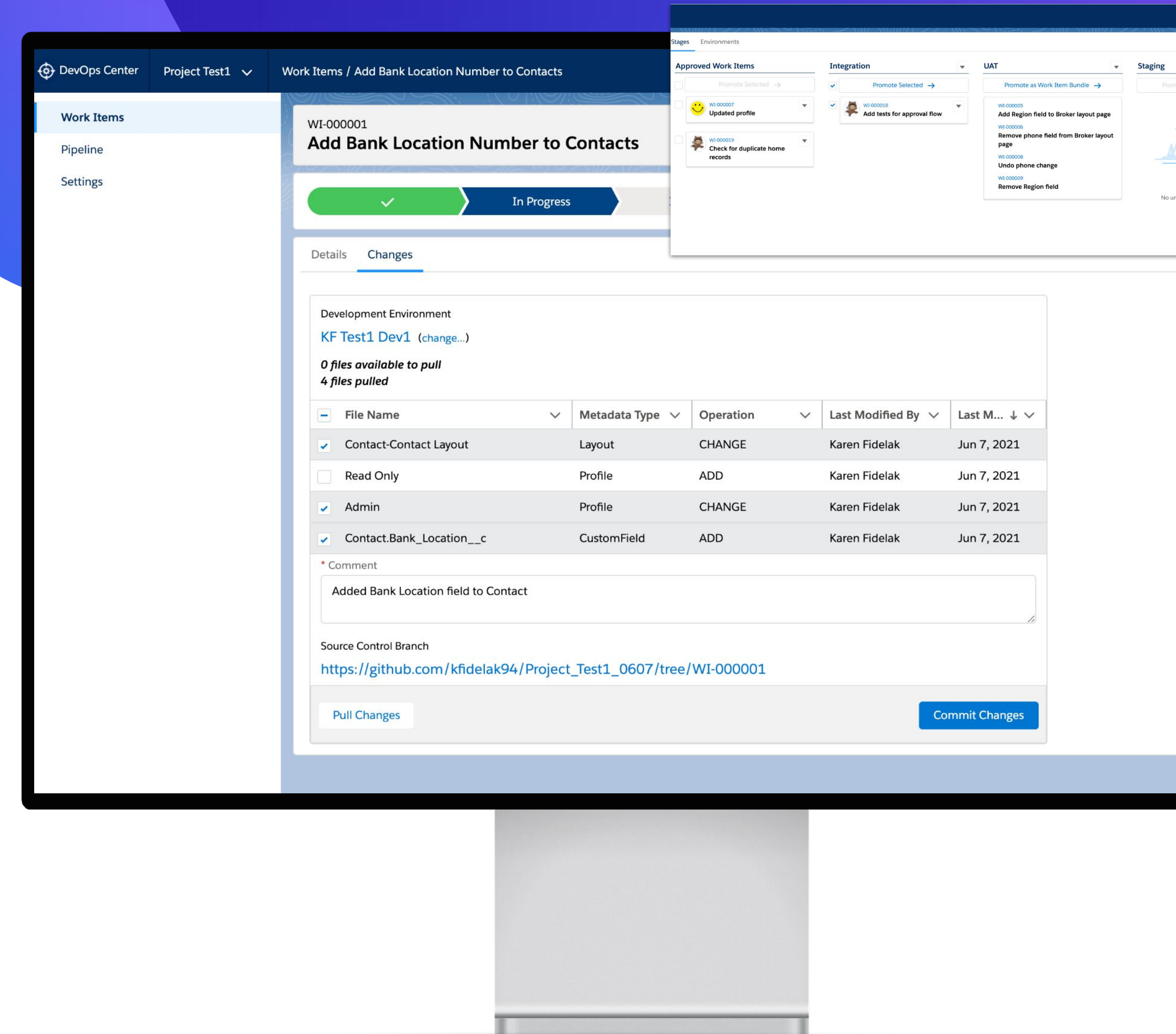
Commit changes, create PRs, merge branches, deploy
from the UI, CLI, and/or VCS and project stays in sync

+

+

Currently in
Closed Beta

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DevOps Center Customer Perspective

John Eichsteadt
Marcus & Millichap



DevOps Center For Everyone



Architect



Developer



Admin



Power User



Consultant

Organizing Our Deployments

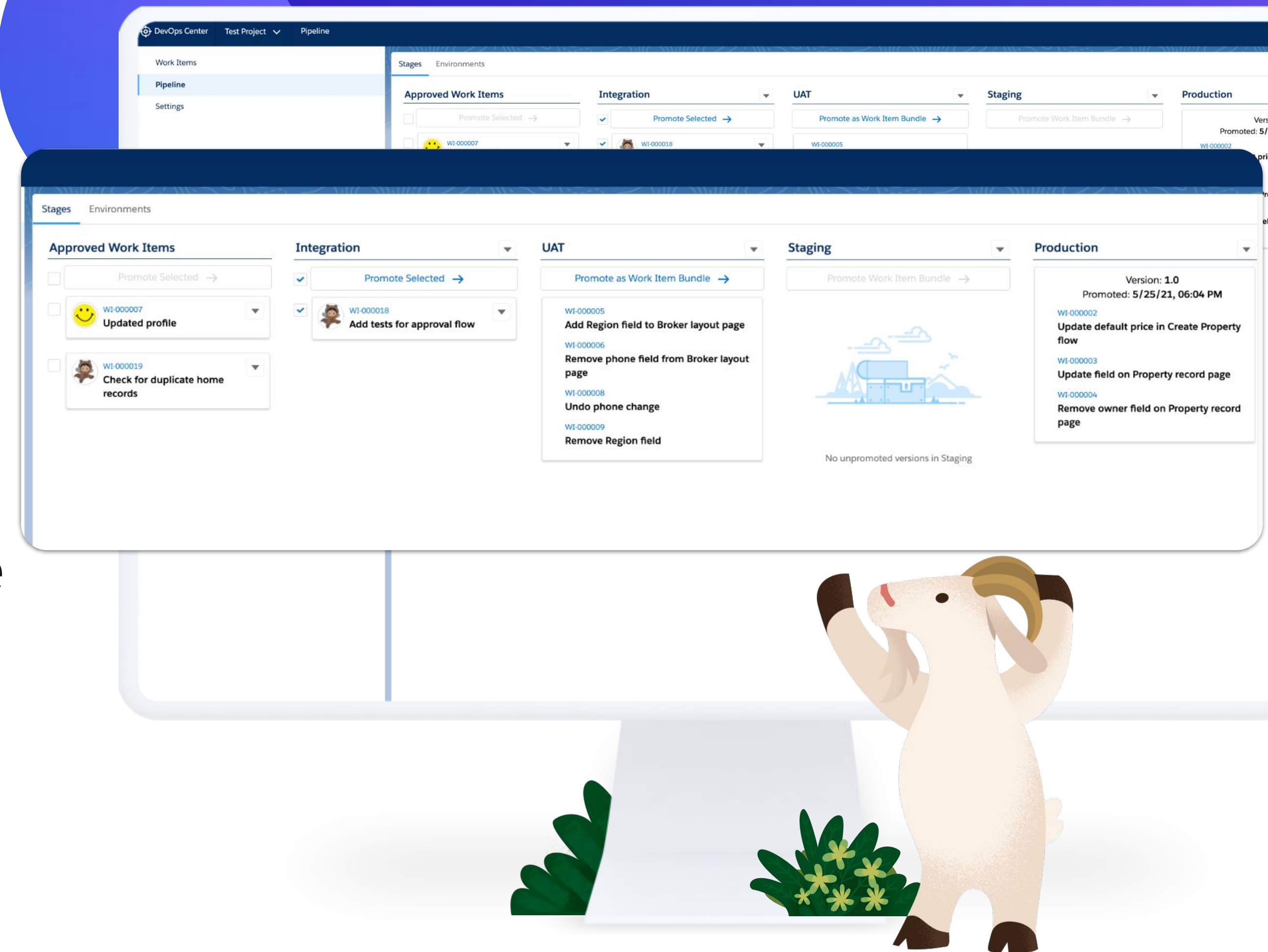
Customizable Pipelines

Supports Multiple Pipelines

- Keep work in the appropriate branches and repositories

Supports Bundling

- Choose to set a bundling stage to ensure tested work is promoted together



Separation of Roles

Team Accountabilities

DevOps Center Managers

- PM and Architects create Projects and set up Pipelines

Devops Release Managers

- Release Managers check the work items before they are approved and promoted to reduce errors and conflicts



The Past Is Behind Us



Forgetting Change Set Items

Being able to see your recent changes and add them to your work items helps prevent that v12 change set

Everything in Source

Until now it's been up to developers to ensure everything is in source control.

Bundling Option

Sometimes it makes sense to deploy work all at once. It's great to be able to bundle without having to create yet another change set



DevOps Center ISV Perspective

Ian Gotts and Adrian King
Elements.cloud



Massive opportunity



Elements + DevOps Center completes the foundation of SDLC tooling

Elements.cloud - *Build the right things*

Requirements -> UPN / ERD - > Org Analysis -> User Story=Work Item

DevOps Center - *Build the things right*

Work Item deployed through pipeline into Prod

Elements.cloud provides analysis and context



Elements.cloud + DevOps Center



DevOps Center

Elements Integration Demo

Work Items

Pipeline

Settings

WI-000014

Partner ROI (fix1)

✓

✓

✓

✓

Promoted

Closed

DetailsChangesActivity History

You can't make changes to a promoted work item. This work item has been promoted to Staging.

>

i

Work items

WI-000013

>

WI-000014

>

Summary

Partner ROI (fix1)

DevOps Centre integration

Linked to WI-000014

Status

Promoted

Environment staging

WI-000019

>

WI-000025

>

Metadata

Committed metadata (1)

Create: Partner ROI

Type: Field Object: Success Story



Elements.cloud + DevOps Center



DevOps Center

Elements Integration Demo

Work Items

Pipeline

Settings

WI-000014

Partner ROI (fix1)

Details Changes Activity History

You can't make changes to a promoted work item. This work item

Create work item

Work items

WI-000013

WI-000014

Summary

Partner ROI (fix1)

DevOps Centre integration

Linked to WI-000014

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Promoted

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WI-000019

WI-000025

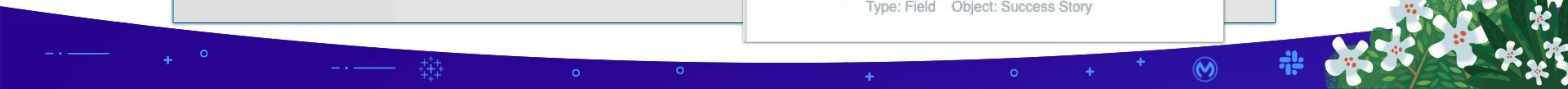
Metadata

Committed metadata (1)

Create: Partner ROI

Type: Field Object: Success Story

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Elements.cloud + DevOps Center



DevOps Center

Elements Integration Demo

WI-000014 Partner ROI (fix1)

Work Items

Pipeline

Settings

Activity: Create success story

Diagram: Sales process

Map: Sales process, level 1

```
graph LR; Lead --> 1[Validate Lead]; 1 -- Customer --> 2[Contact to arrange demo]; 1 -- SI --> 3[Direct to website]; 2 -- Date agreed --> 4[Conduct demo]; 3 -- Qualified in --> 5[Raise opportunity]; 4 -- Qualified in --> 5; 5 -- Stage raised --> 6[Close deal]; 6 --> 7[Onboard]; 7 -- RTG --> 8[Support]; 8 -- Great story --> 9[Create success story]; 9 -- Published --> End
```

Add documentation Copy story

Links

Interview notes

White boarding session

Partner handbook

Process Activities

Create success story

Contact to arrange demo

WI-000025

Metadata

Committed metadata (1)

Create: Partner ROI

Type: Field Object: Success Story



Elements.cloud + DevOps Center



DevOps Center

Dependency tree
Root item: Space

App

Field Stage

Netsuite (1)

Order

Mulesoft (3)

Allocate licenses

Order products

Cancel order

Slack (1)

Tableau (2)

Opportunities by category

Opportunities by likelihood

Apex Class (2)

MassUpdateSimpleControllerTest

ElementsImport_TEST

Email Template (1)

Field (1)

PartnerRenewOpportunity

TEMP-Process credit notes

UpdateOpportunityCurrency

SpaceOpportunityAllocation

Make Account Target

CreateProTrialfromSpace

AssignOpportunityToSpace

UpdateToUnlimitedOpportunit...

Flow (21)

Global Action (1)

Page Layout (7)

Process Builder Workflow (6)

Lightning Page (1)

Jira (1)

Ticket Ref

Tableau (1)

Probability of Opportunities

ServiceNow (2)

Contact Name

Contact ID

Apex Class (1)

Space

Field impact
High

% FILLED BY RECORD TYPE
Based on the last updated 10k records
Total number of records: 2 417
Overall: 46.40%
By Record Type
Add On Opportu...
Renewal Opportu...
Custom Opportu...
Renewal Unlimi...
Initial Opportu...
Custom Consult...
No Record Type
Initial Consul...
DPM Opportunit...
Initial Unlimi...
DPM Renewal Op...
Add On Consul...
Credit Card Op...
Partner Acquis...
Renewal Consul...
View all

fix1)
re integration
WI-000014
Environment
staging

DEPENDENCY/WHERE USED: SINGLE LEVEL
Apex Classes (2)

Committed metadata (1)
Create: Partner ROI
Type: Field Object: Success Story



Development process



Objective

Enhance DevOps Center with rigorous analysis

Easy to implement alongside DevOps Center

Analysis “Build the right thing”

Understand the DevOps Center data model

Understand the underlying processes

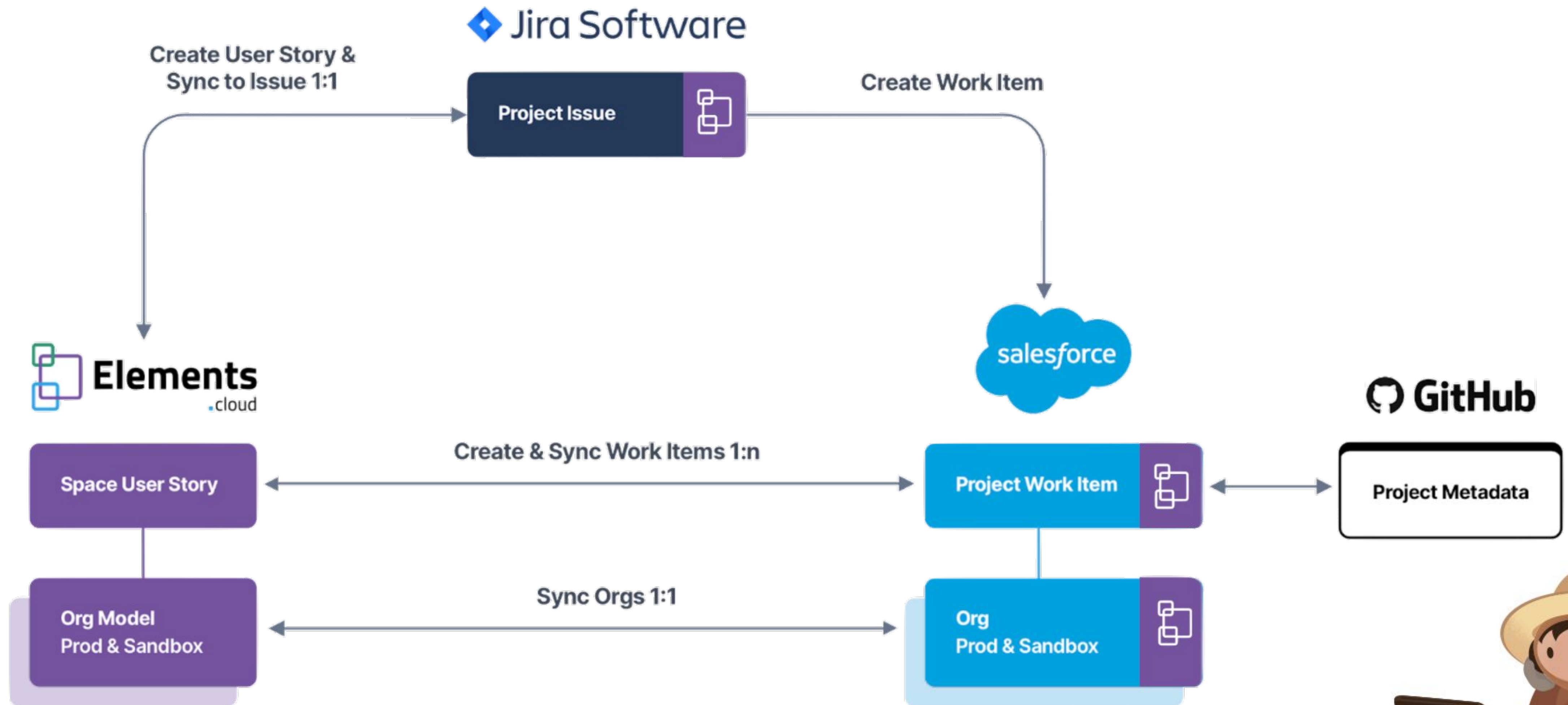
Development “Build the thing right”

Create new Extension Package

Updated Elements.cloud & Chrome extension



Architecture/tech stack



DevOps Center / Elements.cloud Integration Customer Perspective

John Eichsteadt
Marcus & Millichap





Integrated Workflow

From concept to completion



AndrewGregKimRichardScott

Client360 Use Cases

REQUIREMENTSSTORIESFEEDBACKGrid views: All

Summary	Story#	A...	Description
<input type="checkbox"/> Analytics Accelerator	171		
<input type="checkbox"/> Add CP Datasets	170		
<input type="checkbox"/> Add MC Datasets	169		
<input type="checkbox"/> Sync Object & Field Data	168		
<input type="checkbox"/> Listing Reduced Automation for Matches	167		
<input checked="" type="checkbox"/> Client Portal - Production - Full Change Set Deployment	166		Deploy full Client Portal change set to Procution.
<input type="checkbox"/> Marketing Center - Production - Full Change Set Deployment	165		Deploy full Marketing Center change set to Production.
<input type="checkbox"/> Client Portal - Staging - Full Change Set Deployment	164		Deploy the full Client Portal change set to Staging.
<input type="checkbox"/> Marketing Center - Staging - Full Change Set Deployment	163		Deploy the full Marketing Center change set to Staging.
<input type="checkbox"/> Modify Property Image URL Formula for Sizing	162		
<input type="checkbox"/> Create Flows/Formulas to Populate Header Fields	161		Create a formula for the Price header Create flows for the Locations & Property Types headers
<input type="checkbox"/> Setup Pardot Testing Contacts	160		Set up contacts to be used in Pardot test plans. The contacts must addi...
<input type="checkbox"/> Add Additional Matches Field	159		
<input type="checkbox"/> Filter for Saved Search Email Testing vs Live	158		Pass Apisero the filter c...
Items per page: 1001 - 100 of 162			

My First Test For DevOps Center ...

Edit storyChange status

Create work item

Work items

WI-000000

Metadata

Committed metadata (0)

Uncommitted metadata (1)

Metadata

Committed metadata (0)

Uncommitted metadata (1)

Track Client Portal Registration

Track Client Preferences

Track Related Interested Parties, Leads and Opportunities

Automated Client Portal Saved Search Match Emails Follow ups

Track Client Email Marketing Responses

Track Client Website Activity

Track Client Market Activity

Track Client Social Media Activity

Private Capital Institutional Morn & Pop

Top Sellers Top Buyers Top Borrowers Top Lenders

Top Sellers Top Buyers Top Borrowers Top Lenders

Top Clients by Agent or Originator

Demandship Strategy

Clients by Portal Activity and Preferences

Clients by Marketing Activity

Clients by Website Activity

Social Media Campaigns

Buyer Lead Tracking

Follow up Journey

Inbound Lead Distribution

Lead Follow up Accountability

Lead Nurturing Campaigns

Recruiting Activity Tracking

It Works How We Want to Work

Our connected workspace

Creating from anywhere

- Maybe it's from a roadmap in Jira, maybe it's from a case in Salesforce, or maybe it's from a process map in Elements

See the same information everywhere

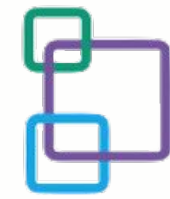
- The Elements extension gives us visibility to the same information from Elements, Jira, or Salesforce



Combining Our Tools

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Plan Your Work



- Create the Story
- Add Metadata/Placeholder
- Assess Risk
- Create Work Items



Work Your Plan

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- Make the changes
- Add changes to the Work Item
- Verify nothing planned is missing
- Monitor deployment status



CTA

Trailblazer
Community



sfdc.co/devops-tb

Implementation
Guide



bit.ly/devopscenter

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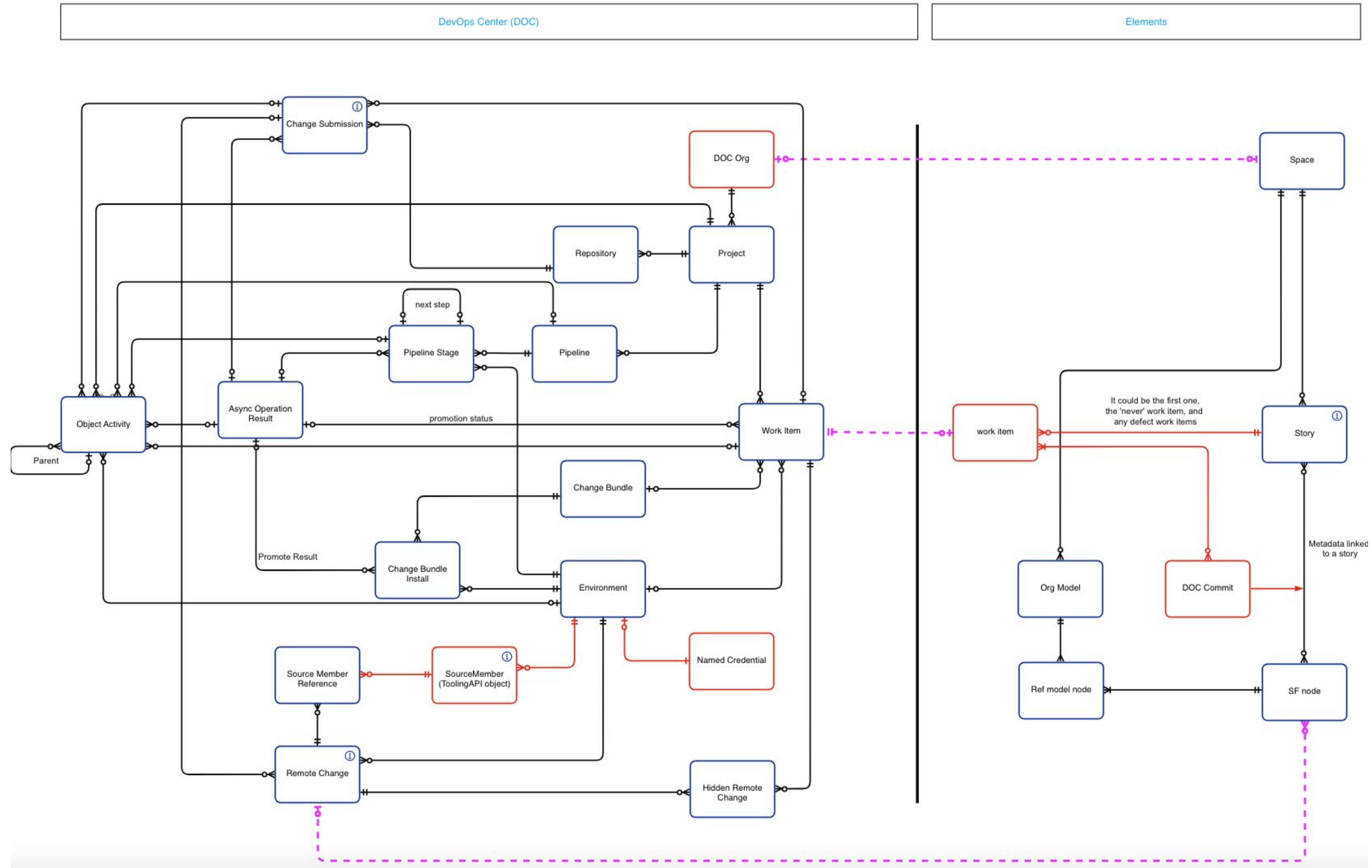


Q&A

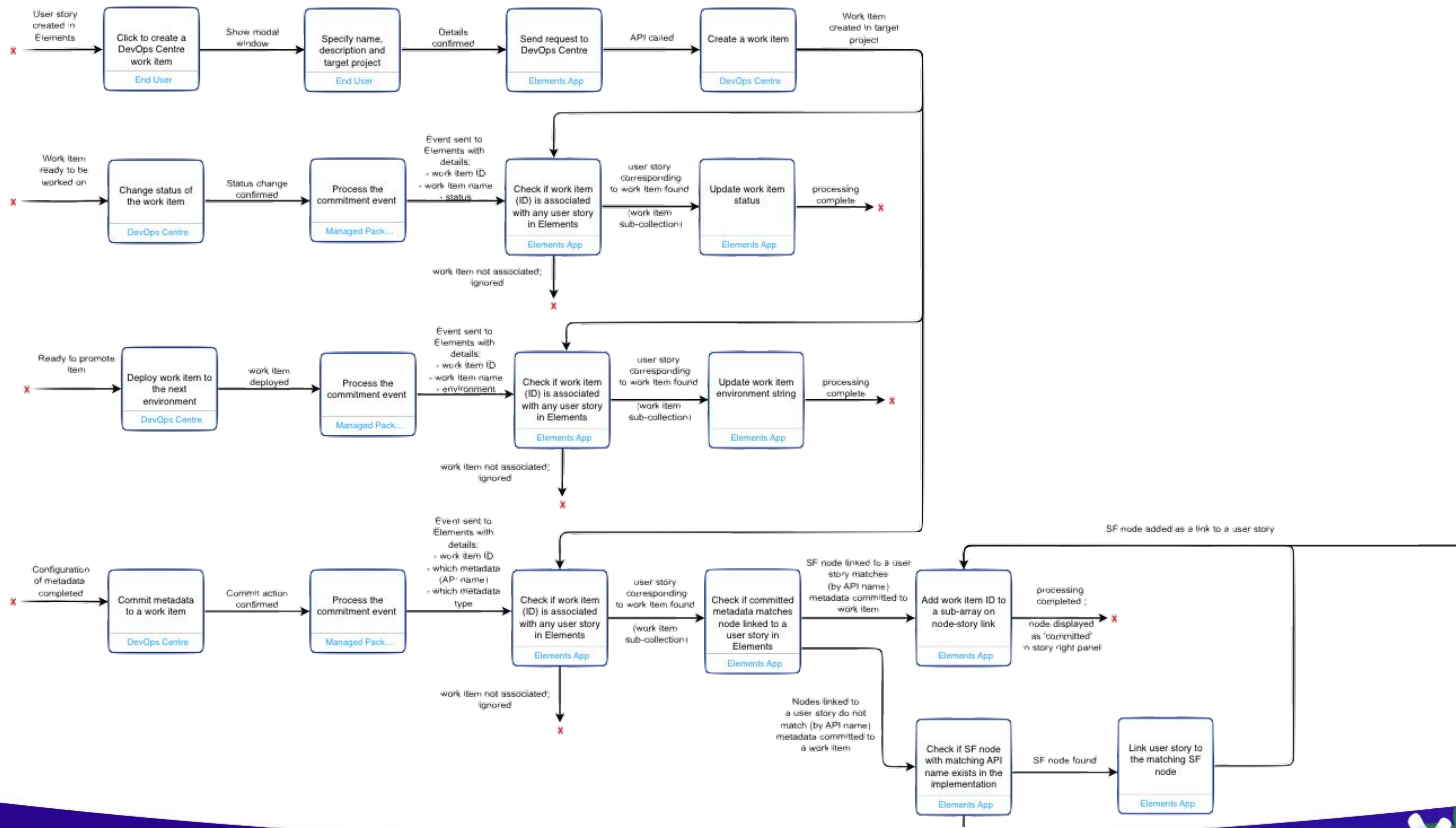
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Step1: Understand the data model (ERD)



Step 2: Understand the Process (UPN)





Thank You

Q&A

