Deploying Flow and APEX Code to Salesforce Production

This guide provides step-by-step instructions for moving your Flow and APEX code from a sandbox to a Salesforce production organization **using Salesforce's built-in tools** (no local source code required).

Prerequisites

- You have access to both the sandbox and production Salesforce orgs.
- You have System Administrator permissions in both orgs.
- The Flow and APEX code are already deployed and tested in the sandbox.

1. Use Change Sets to Deploy Metadata

A. Create an Outbound Change Set in Sandbox

1. **Login to your Sandbox**.
2. Go to **Setup** > **Change Sets** > **Outbound Change Sets**.
3. Click **New** to create a new change set (e.g., "Docusign Composite Envelope Builder").
4. Add a description for clarity.
5. Click **Save**.

B. Add Components to the Change Set

1. In the change set, click **Add** under "Change Set Components".
2. **Add the Flow(s):**
- Component Type: `Flow Definition` or `Flow`.
- Select the active Flow version for the application. For this repository the Flow to include is `Docusign_Envelope_Templates_V4`.
3. **Add APEX Classes:**
- Component Type: `Apex Class`.
- Include the following Apex classes from the package:
- `DocusignCompositeEnvelopeBuilder`
- `DocusignEnvelopeRequest`
- `DocusignEnvelopeRequestHandler`
- `DocusignEnvelopeResult`
- Also include associated test classes:
- `DocusignCompositeEnvelopeBuilderTest`
- `DocusignEnvelopeRequestHandlerTest`
4. **Apex Triggers:**
- This package does not include any Apex Triggers. There are no trigger files in `force-app/main/default/triggers` to add to the change set.
5. **Custom Objects / Fields:**
- There are no custom objects or custom fields that must be deployed for the current implementation. The repository does contain a `Docusign_Configuration__c` object (with `Account_Id__c` and `Base_URL__c`) in `force-app/main/default/objects`, but it is not referenced by the APEX classes or the Flow (the implementation uses the `dfsle` toolkit and `dfsle__EnvelopeConfiguration__c` templates). You do not need to include `Docusign_Configuration__c` or its fields in the change set unless you intentionally want to preserve that leftover metadata.
6. Click **Add to Change Set** after each selection.

C. Add Profiles/Permission Sets (Optional)

- If your app uses custom permissions, add the relevant profiles or permission sets.

D. Upload the Change Set to Production

1. In the change set, click **Upload**.
2. Select your production org as the target.
3. Click **Upload**.

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2. Deploy the Change Set in Production

A. Login to Production

1. **Login to your Production Salesforce org**.
2. Go to **Setup** > **Change Sets** > **Inbound Change Sets**.

B. Validate and Deploy

1. Find the uploaded change set.
2. Click the change set name to review components.
3. Click **Validate** to run tests and check for errors.
4. If validation passes, click **Deploy**.
5. Monitor deployment status and resolve any errors if needed.

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3. Post-Deployment Steps

- **Assign Permission Sets/Profiles** to users as needed.
- **Test the Flow and APEX functionality** in production.
- **Review Custom Settings/Metadata** for environment-specific values (e.g., API keys, URLs).

Troubleshooting

- If deployment fails, review error messages for missing dependencies or test failures.
- Ensure all referenced components (objects, fields, flows, classes) are included in the change set.
- For large or complex deployments, consider deploying in smaller batches.

References

- [Salesforce Change Sets Documentation](https://help.salesforce.com/s/articleView?id=sf.changesets.htm)
- [Deploy Flows with Change Sets](https://help.salesforce.com/s/articleView?id=sf.flow_deploy.htm)
- [Deploy Apex Code with Change Sets](https://help.salesforce.com/s/articleView?id=sf.code_deploy_changeset.htm)

Contact your Salesforce administrator or partner for additional support if needed.