

# How to Move a Salesforce Component from an Organisation to Another Organisation using an Unmanaged Package

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This step-by-step guide focuses on Flows but you can move many other Components (such as Apps, Custom Fields, Lightning Pages, Permission Sets, Record Types, Recommendation Strategy, Apex Class, etc.) between unrelated Salesforce organisations using unmanaged packages.

This is a great way to save time by building once, then reusing.

### Step 1 - Create an Unmanaged Package

In the organisation (org) where the Component currently lives, go to Setup -Package Manager and click New in the Packages section.

Setup Home Object	Manager 🗸
Q package	STUP Package Manager
✓ Apps	
<ul> <li>Packaging</li> </ul>	Packages Heb for this Page 🥑
Installed Packages	
Package Manager	Namespace Settings
Package Usage	Namespace settings let you create and register a namespace for a first-generation or second-generation managed package, or an unlocked package.
Didn't find what you're looking for? Try using Global Search.	After you create a namespace, you can associate a first-generation managed package with your registered namespace For unlocked and second generation managed packages, use Saledorce CLI to associate your namespace with your package. If the edit button on this page isn't visible, ensure you're using a Developer Edition org that limit a Developer
	Language Settings Edit
	Create a language extension package that contains translations of components in one or more base packages.
	Language extension package is Disabled
	Packages
	A Building a new app? Have you considered using second generation managed packages? Floable versioning and the ability to share a manages carcos packages are just two reasons why developers low creating second-generation managed packages. We think you'll be able a management of the ability to share a management of the ability to ability a man
	To create a new first-generation managed package or an urmanaged package, dick New
	Packages New

Fill in the Package Name and the Description, then click Save.

SETUP Package Manager			
Create a Package			Help for this Page 🥝
Package Edit	Save Cancel		
Package Name	Animal_Intake_Flow	Managed	
Language	English		
Configure Custom Link	-None ¥		
Notify on Apex Error			
Description	This package contains the Animal Intake Flow.		
	Save Cancel		

The package has been created. Click Add in the Components section.

SETUP Package Manager			OMME DESCRICTER SUCCESSION
Package Animal_Intake_Flow « Back to Package List			Help for this Page 🥹
Package Detail	Edit Delete Upload		
Package Name	Animal_Intake_Flow	Туре	Unmanaged
Language	English		
Notify on Apex Error			
Created By	Daniela B, 08/04/2024 22:30	Last Modified By	Daniela B. 08/04/2024 22:30
Description	This package contains the Animal Intake Flow.		
Components Versions		Add View Dependencies	
no protago compolícito delilica			

For Flows, the Component to choose from the drop down list is Flow Definition.

SETUP Package Manager		
Add to Package Animal_Intake_Flow		Help for this Page 🥹
To create a new first-generation managed package or an unmana	ged package, click New.	
	Add to Package Cancel	
Component Type Flow Definition  Field Statustion Trans Field Stat Green 5 Flow Definition Green 5 Flow Test Global Value Set Home Page Component Home Page Layout Inbound Network Connection Knowledee Action	Add to Package Cancel	A   B   C   D   E   F   G   H   I   J   K   L   M   N   O   P   Q   R   S   T   U   V   W   X   Y   Z   Other   All
Language Translation Lightning Bolt Lightning Community Template Lightning Community Theme Lightning Experience Theme Lightning Message Channel Lightning Page Lightning Web Component Bundle List View ML Cota Definition		

The list of Flows available in your org is now displayed. You can also use the alphabetical list to quickly find your flow. Choose your Flow and click Add to Package.

Package Manager		
Add to Package Animal_Intake_Flow		Hop for this Page 🥹
To create a new first-generation managed package or an unma	inaged package, click New.	
	Add to Package Cancel	
Component Type: Flow Definition	~	A B C D E F G H I I J K L M N O P O R S T U V W X Y Z OME AN
Name †		
Add_leads_to_Spring_2023_campaign		
Animal_Intake_Form		
<u>Animal_Intake_Form_April_2</u>		
<u>Animal_Intake_Form_Final</u>		
Animal_Intake_Form_1		
Create_lead_for_kite_contestant_business_opportunity		
Kite_Design_Contestant_Registration		
New_Lead_for_event_notification		
New_lead_for_newsletter_sign_up		
task_to_call_newly_registered_kite_design_contestant		
	Add to Package Cancel	

The Flow and its related components have been added to the package. You can choose to include more components to this package if needed by clicking Add. Once you have bundled all the components you want, click Upload.

Package Animal_Inta « Back to Package	ake_Flow				
	- CIDC				Help for this Page 🥹
Package Detai		Editi Delete Unit	head		
Fackage Detai	Package Name	Animal Intake Flow		Type Unmanaged(Extension)	
	Language	English		i) pr	
	Notify on Apex Error				
	Created By	Daniela B, 08/04/2024 22:30		Last Modified By Daniela B, 08/04/2024	22:30
	Description	This package contains the Animal Intake Flow.			
Components	Versions	Component Name 🗸	Search this package	Search Add View Dependencies	
Action Co	omponent Name *	Parent Object	Туре	Included By	Owned By
An	nimal		Custom Object	Animal_Intake_Form_1	Animal Shelter Starter
An	nimal	Treatment	Custom Field	Animal_Intake_Form_1	Animal Shelter Starter
An	nimal	Animal Relationship	Custom Field	Animal_Intake_Form_1	Animal Shelter Starter
An	nimal Relationship		Custom Object	Animal_Intake_Form_1	Animal Shelter Starter
Remove Ap	nimal_Intake_Form_1		Flow Definition	User Selected	
Br	reed		Custom Object	Animal_Intake_Form_1	Animal Shelter Starter
All 🗸					Previous (1 - 6 of 24) Next

Fill in the Version Name and Description. You can also include Release Notes and Post Install Instructions as appropriate. The package can be password protected if necessary.

Betup Package Manager		
Upload Package		Help for this Page 🥝 💧
Please provide details about this package before	re upload. These settings determine what requirements must be met in order to install this package.	
Version Name Version Number Release Notes	Animal Intake Flow         Example: Spring 2024           1.0         Example: 1.2 <ul></ul>	
Post Install Instructions	This link will be available during the installation process, and available from the package detail view after installation.	
Description	Shown after installation, and available from the package detail view after installation. This package contains the Animal Intake Flow.	
Password (Optional)		
Password protect this Package by entering a Password Confirm Password	password below. Leave blank if you do not want to require a password.	

Scroll down the page to Package Requirements and choose them as appropriate.

Note: Notify installers of any requirements and incompatibilities with this package. The requirements selected below will be displayed to the administrator prior to download.

Administrators will not be allowed to install this package if their salesforce.com configuration does not meet the requirements specified (some requirements have been automatically detected as part of the sharing process).

• •	sietrator prior to doubload	
Administrators will not be allowed to install this package if their salesforce com configuration does not meet the requirements specific	as a compared in the commode. ad (some requirements have been automatically detected as part of the sharing process).	
Feature	Required	
Flow	✓	
Additional Feature Requirements	Required	
Account Team		
Advanced Currency Management Disabled		
Analytics Template		
Answers		
API and High Volume Platform Events		
API and Platform Events		
B2B Commerce		
Business to Consumer (B2C)		
Campaign		
Case Teams		

Scroll down the page to Object Requirements and choose them as appropriate.

Note: Notify installers of object requirements for this package. The requirements selected below will be displayed to the installer prior to download. Users will not be allowed to install this package if they do not meet the requirements specified (some requirements have been automatically detected as part of the upload process).

Then click Upload
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attional Object Requirements	Record Types	Sharing	Field History Tracking	Feed Tracking
ntract				
der				
mpaign				
mpaignMember				
count				
ntact				
ad				
oportunity				
oduct2				
set				
ise				
lution				

The upload has been completed. Your package is now available for install using the installation URL. To publish on AppExchange, log on with your publisher login to access your public listings.

Package N	/lanager					
ackage Version Animal_Intake_F « Back to Package	-low, Versio	n 1.0				Help for this Page 🥹
Upload Complet Your package is r	e now available for insta	II using the installation URL below. To publish	h on AppExchange, log on with your publisher	login to access your public listings.		
Version Detail		Depreca	ate			
	Package Name	Animal_Intake_Flow		Uploaded By	Daniela B, 08/04/2024 22:39	
	Version Name	Animal Intake Flow				
	Version Number	1.0				
	Version Number Description Installation URL	1.0 This package contains the Animal Intake Fl https://login.salesforce.com/packaging/insta	low. allPackage.apexp?p0=04t0900000zXYP	Password Protected	[Change Password]	
Package Component # Flows (1)	Version Number Description Installation URL	10 This package contains the Animal Intake Fi- https://login.salesforce.com/packaging/insta	low. Jowanne (2000) John (2000	Password Protected	[Change Password]	
Package Component F Flows (1) Component Name	Version Number Description Installation URL	1.0 This package contains the Animal Intake FI https://login.salesforce.com/packaging/insta	iow. allPackage.apexp?p0=041090000002XYP Parent Object	Password Protected	[Change Password]	
Package Component Flows (1) Component Name Animal Intake Form 1	Version Number Description Installation URL	10 This package contains the Animal Intake FI https://login.salesforce.com/packaging/insta	low. allPackage.apose2p0=04099000002XYP Parent Object	Password Protected	[Change Password] Component Type Flow Version	
Package Component Flows (1) Component Name Animal Intake Form 1 F Fields (3)	Version Number Description Installation URL	10 This package contains the Animal Intake FI https://login.salesforce.com/packaging/instr	low. allPackage.apsorp?p0=040990000002XYP Parent Object	Password Protected	[Changa Password] Component Type Flow Version	
Package Component Flows (1) Component Name Animal Intake Form 1 Fleids (3) Component Name	Version Number Description Installation URL	10 This package contains the Animal Intake FI https://login.salesforce.com/packaging/insta	low. allPackaga.apaxs2p0=0409900000zXYP Parent Object Parent Object	Password Protected	[Change Password] Component Type Flow Version Component Type	
Package Component Flows (1) Component Name Animal Intake Form 1 Fields (3) Component Name Quarantine Start Date/Tim	Version Number Description Installation URL S	10 This package contains the Animal Intake FI https://login.salesforce.com/packaginginstz	low. allPackage.apoxp?p0=04099000002XYP Parent Object Parent Object Treatment	Password Protected	[Change Password] Component Type Flow Version Component Type Custom Field	
Package Component Flows (1) Component Name Animal Intake Form 1 Fields (3) Component Name Quarantine Start Date/Tim Quarantine Comments	Version Number Description Installation URL S	10 This package contains the Animal Intake FF https://fogin.salesforce.com/packaging/instr	low. allPackage.apoor2p0=0409000002XYP allPackage.apoor2p0=0409000002XYP Parent Object Parent Object Treatment Treatment Treatment	Password Protected	[Changa Password] Component Type Flow Version Component Type Custom Field Custom Field Custom Field	

As package creator, you will also receive an email from Salesforce containing the URL to install your package into any org. Note that there is a different URL for sandbox orgs.

Subject: Upload Succeeded: Animal\_Intake\_Flow, v1.0



## Step 2 - Install the Unmanaged Package in Your Org

Click the URL that Salesforce provided. This will prompt you to login to your org (This is the org where you want to install the Flow or other components from the unmanaged package).

Once you are logged in to your org, proceed to installing the package.

You can choose to install it for Admins only (play it safe) or All Users or Specific Profiles.

What if	existing component na	mes conflict with ones in this r	package?
	ot install.	ines connet with ones in this p	Jackage:
Rena	me conflicting components in	package.	
O Install for Adn	nins Only	Install for All Users	Install for Specific Profiles
Install for Adn	nins Only	Install for All Users	Install for Specific Profiles Install Cancel
Install for Adn	nins Only	Install for All Users	Install for Specific Profiles Install Cancel Version Number
Install for Adn     Name mail Intake Flow	nins Only	Install for All Users	Install for Specific Profiles Install Cancel Version Number
Install for Adn     Name mimal_Intake_Flow scription	nins Only Publisher -	Install for All Users Version Name Animal Intake Flow	Install for Specific Profiles Install Cancel Version Number 1.0
Install for Adn     I	nins Only Publisher - Animal Intake Flow.	Install for All Users Version Name Animal Intake Flow	Install for Specific Profiles Install Cancel Version Number 1.0

Note: If you see the message below, this means that the installation is taking a long time and you will receive an email when it is completed. Click Done.

Install Animal_Intake_Flow							
This app You will re	<b>) is taking a long time t</b> e eceive an email after the inst	<b>o install.</b> :allation has completed.					
			Done				
App Name	Publisher	Version Name	Version Number				
Animal_Intake_Flow	-	Animal Intake Flow	1.0				
Description							
This package contains the	e Animal Intake Flow.						

You will receive an email confirmation that the package has been installed in your org.

Package Animal\_Intake\_Flow Install Successful Inbox ×

support@emea.salesforce.com <support@emea.salesforce.com>

to me 💌

Your request to install package "Animal\_Intake\_Flow Animal Intake Flow" was successful.

In case of installation failure, troubleshoot it as appropriate (the reason will appear on the package installation page and you will also receive an email from Salesforce about it).

### Step 3 - Testing

Go to Setup - Installed Packages to see your newly installed package.

Installed Packages								
	Action	Package Name	Publisher	Version Number				
	Uninstall	Animal_Intake_Flow	-	1.0				
		Description This package contains the Animal Intake Flow						

Then test your Flow or other components installed in your org before deploying them to your users.

#### Reference

<u>Create and Upload an Unmanaged Package | First-Generation Managed Packaging</u> <u>Developer Guide | Salesforce Developers</u>