

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

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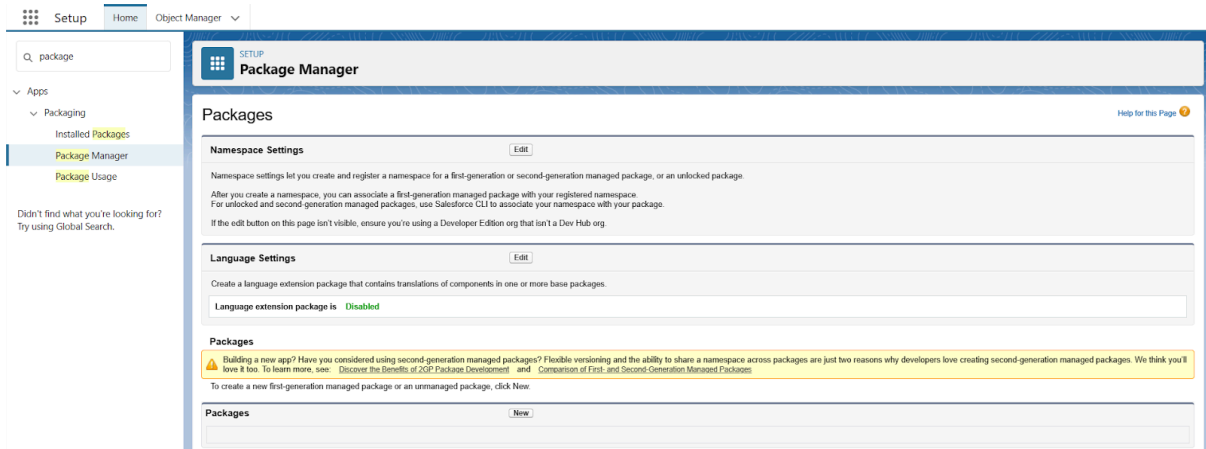
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This step-by-step guide focuses on Flows but you can move many other Components (such as Apps, Custom Fields, Lightning Pages, Permission Sets, Record Types, Recommendation Strategy, Apex Class, etc.) between unrelated Salesforce organisations using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

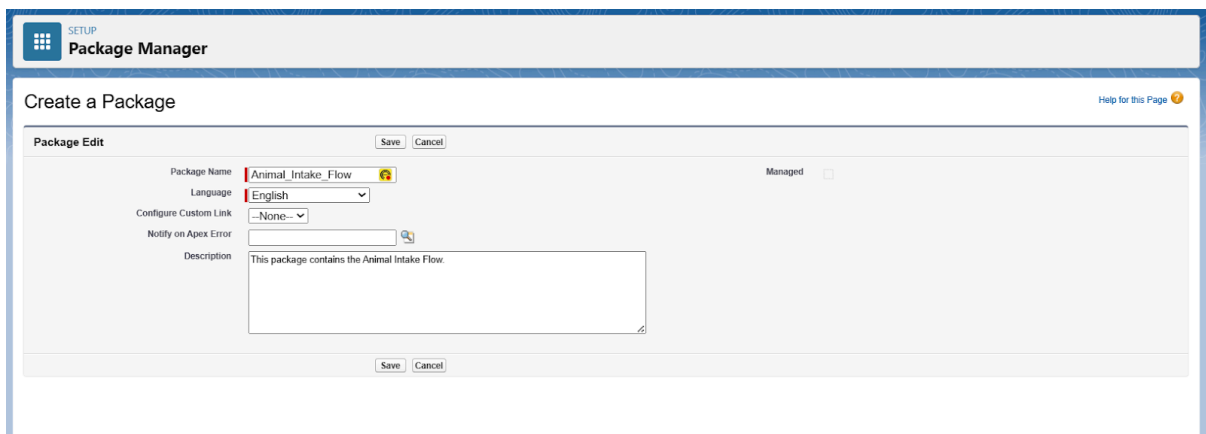
This is a great way to save time by building once, then reusing.

Step 1 – Create an Unmanaged Package

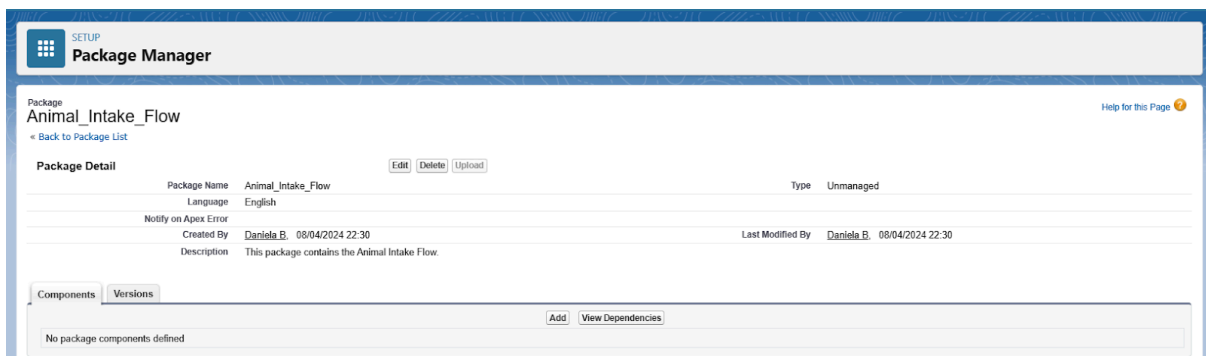
In the organisation (org) where the Component currently lives, go to Setup - Package Manager and click New in the Packages section.



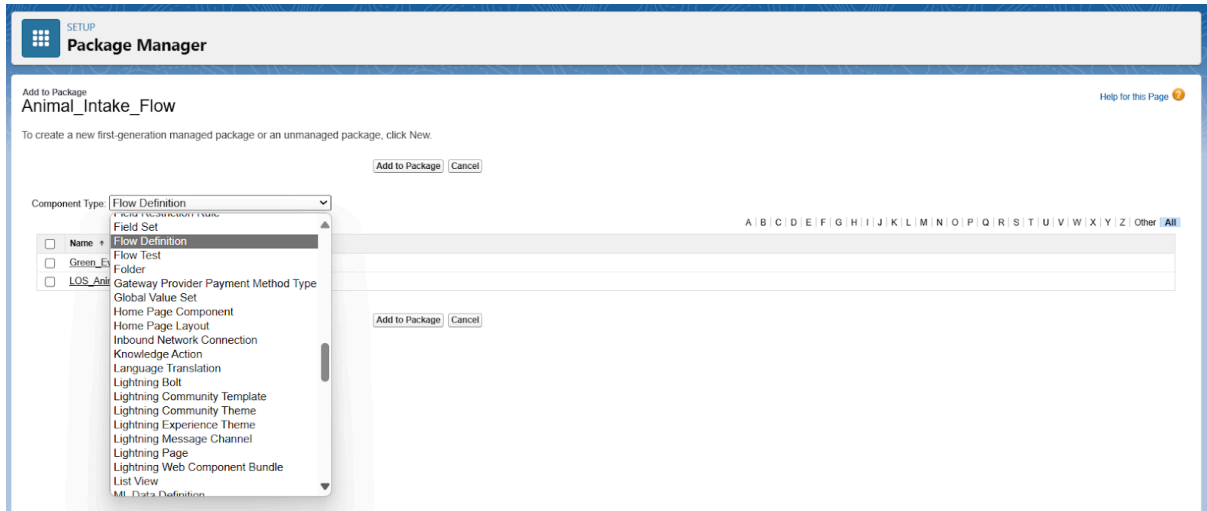
Fill in the Package Name and the Description, then click Save.



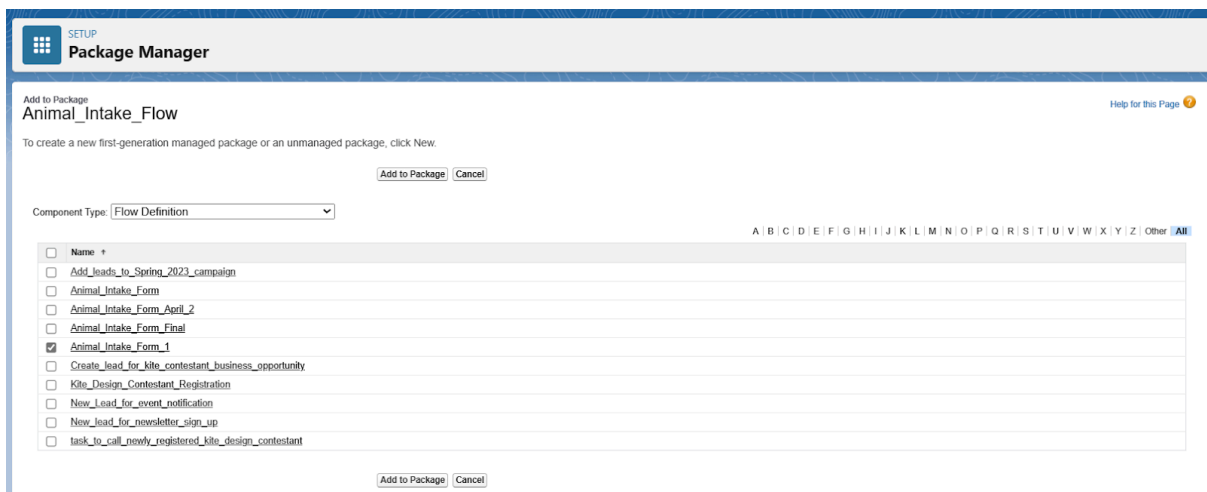
The package has been created. Click Add in the Components section.



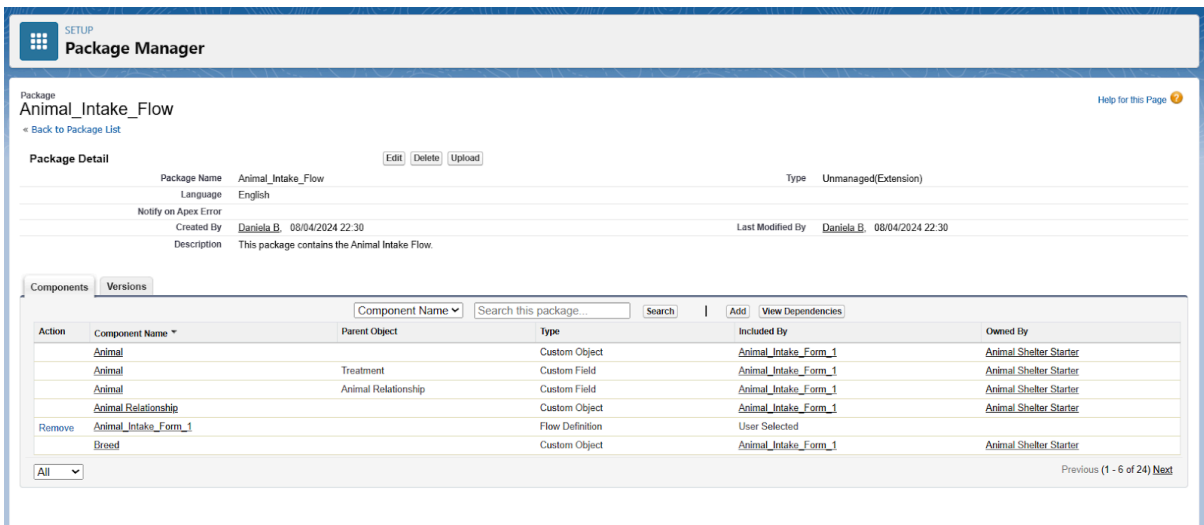
For Flows, the Component to choose from the drop down list is Flow Definition.



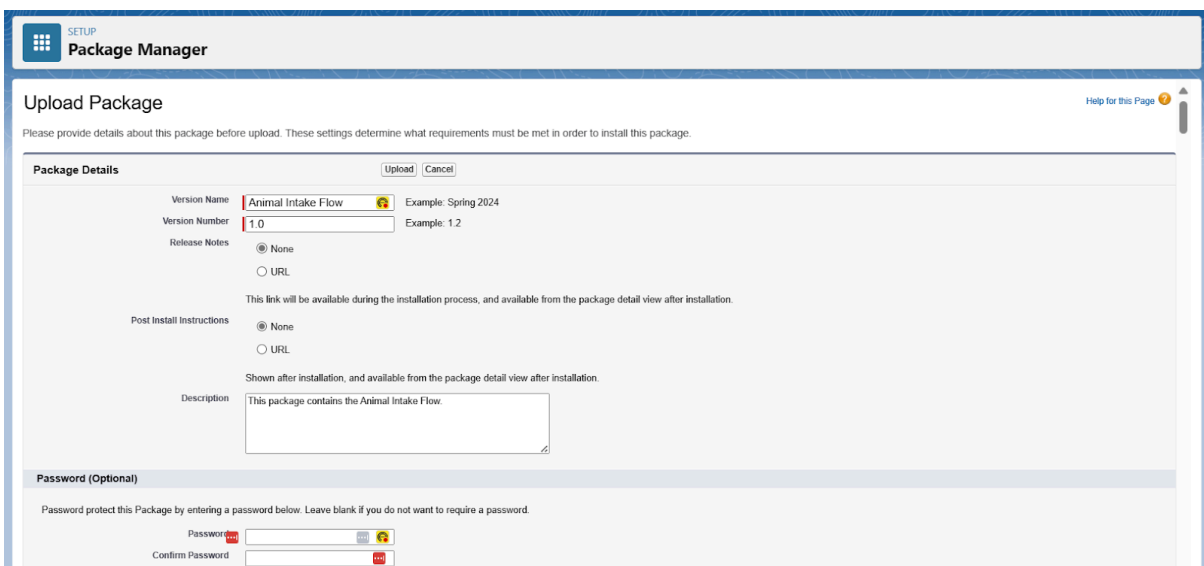
The list of Flows available in your org is now displayed. You can also use the alphabetical list to quickly find your flow. Choose your Flow and click Add to Package.



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.



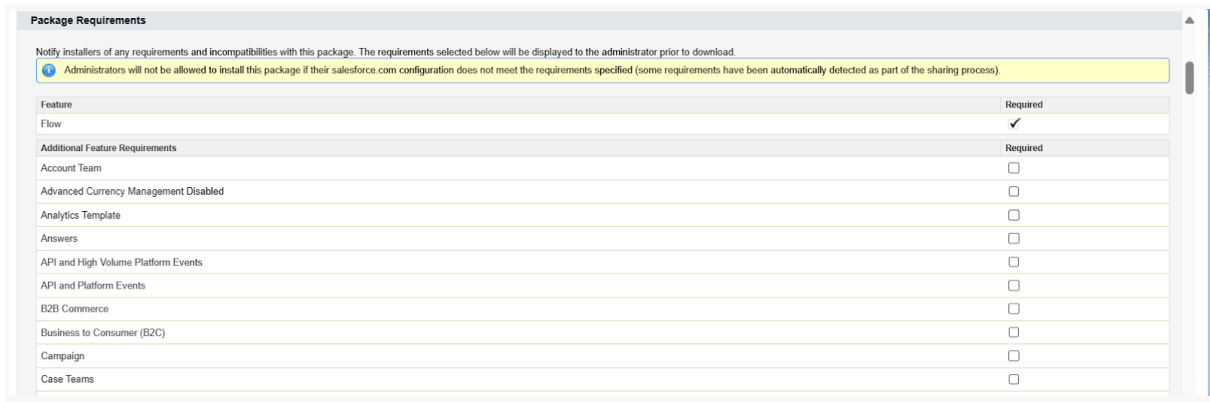
Fill in the Version Name and Description. You can also include Release Notes and Post Install Instructions as appropriate. The package can be password protected if necessary.



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).

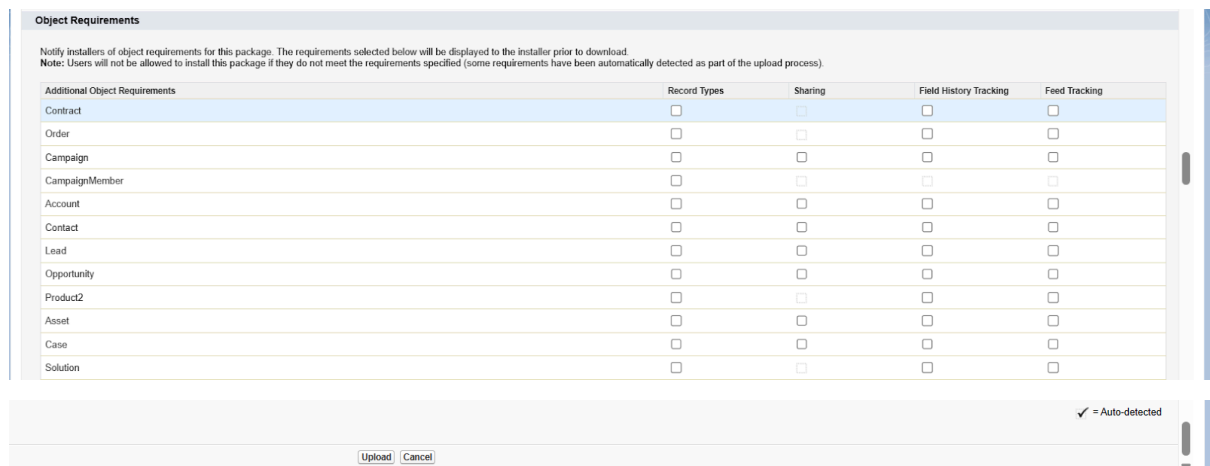


Scroll down the page to Object Requirements and choose them as appropriate.

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



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.

SETUP Package Manager

Package Version
Animal_Intake_Flow, Version 1.0 Help for this Page

← Back to Package

Upload Complete
Your package is now available for install using the installation URL below. To publish on AppExchange, log on with your publisher login to access your public listings.

Version Detail Deprecate

Package Name	Animal_Intake_Flow	Uploaded By	Daniela B. 08/04/2024 22:39
Version Name	Animal Intake Flow		
Version Number	1.0		
Description	This package contains the Animal Intake Flow.	Password Protected	<input type="checkbox"/> [Change Password]
Installation URL	https://login.salesforce.com/packaging/installPackage.apexp?p0=04t09000000zXYP		

Package Components

▼ Flows (1)

Component Name	Parent Object	Component Type
Animal Intake Form 1		Flow Version

▼ Fields (3)

Component Name	Parent Object	Component Type
Quarantine Start Date/Time	Treatment	Custom Field
Quarantine Comments	Treatment	Custom Field
Quarantine End Date/Time	Treatment	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



Package Upload Succeeded

Animal_Intake_Flow

Version 1.0

Use this URL to install the package into any organization:

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t09000000zXYP>

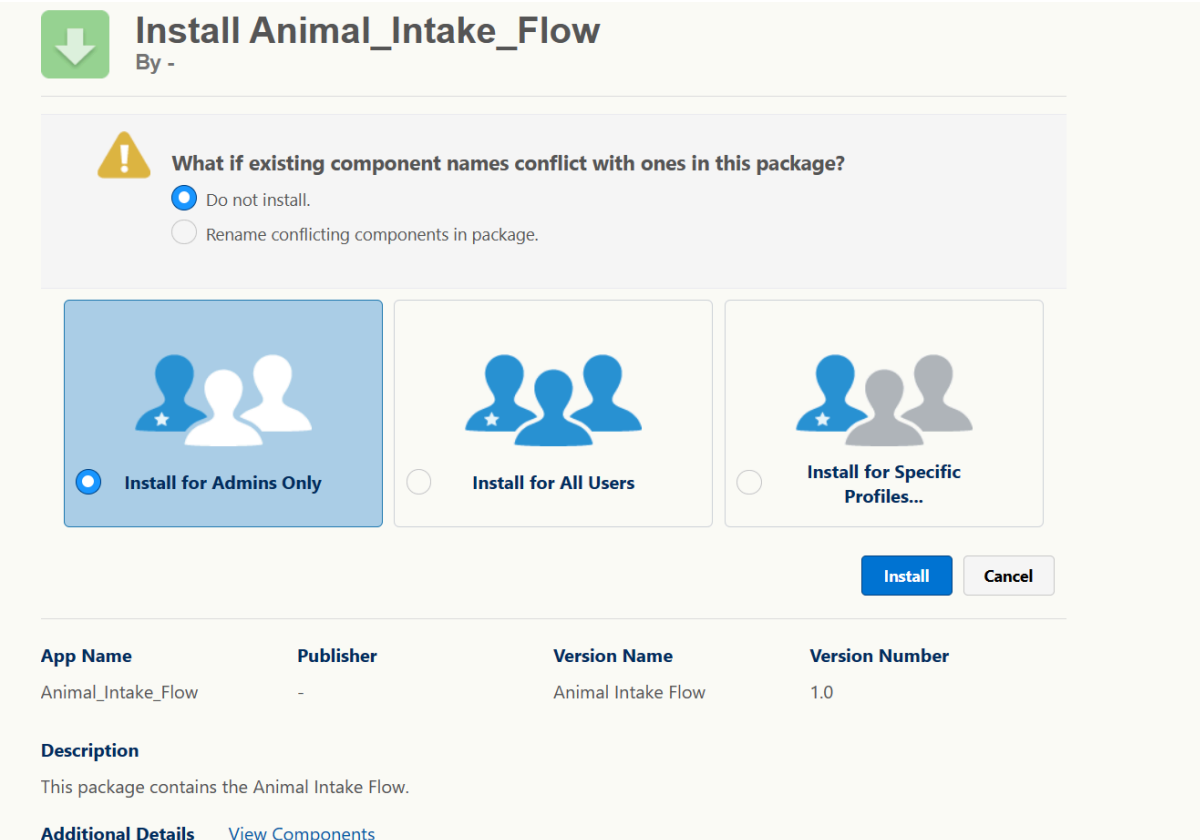
Note: If you are installing into a sandbox organization you must replace the initial portion of the URL with <http://test.salesforce.com>

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.



Install Animal_Intake_Flow
By -

! What if existing component names conflict with ones in this package?

- Do not install.
- Rename conflicting components in package.

Install for Admins Only **Install for All Users** **Install for Specific Profiles...**


Install **Cancel**

App Name	Publisher	Version Name	Version Number
Animal_Intake_Flow	-	Animal Intake Flow	1.0

Description
This package contains the Animal Intake Flow.


Additional Details [View Components](#)

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

By -

**This app is taking a long time to install.**

You will receive an email after the installation has completed.

Done

App Name	Publisher	Version Name	Version Number
Animal_Intake_Flow	-	Animal Intake Flow	1.0

Description

This package contains the 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 x

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

[Create and Upload an Unmanaged Package | First-Generation Managed Packaging Developer Guide | Salesforce Developers](#)