Setting Up Salesforce Git Repositories

Connecting Salesforce with QualityClouds · https://community-staging.qualityclouds.com/qcdocs/qc/connecting-salesforce-qualityclouds/setting-up-salesforce-git-repositories/

Before performing these steps, make sure you have the following information:

- login credentials to the Quality Clouds portal - https://portal.qualityclouds.com/
- Git credentials and repository information

1. Set up your Git repository

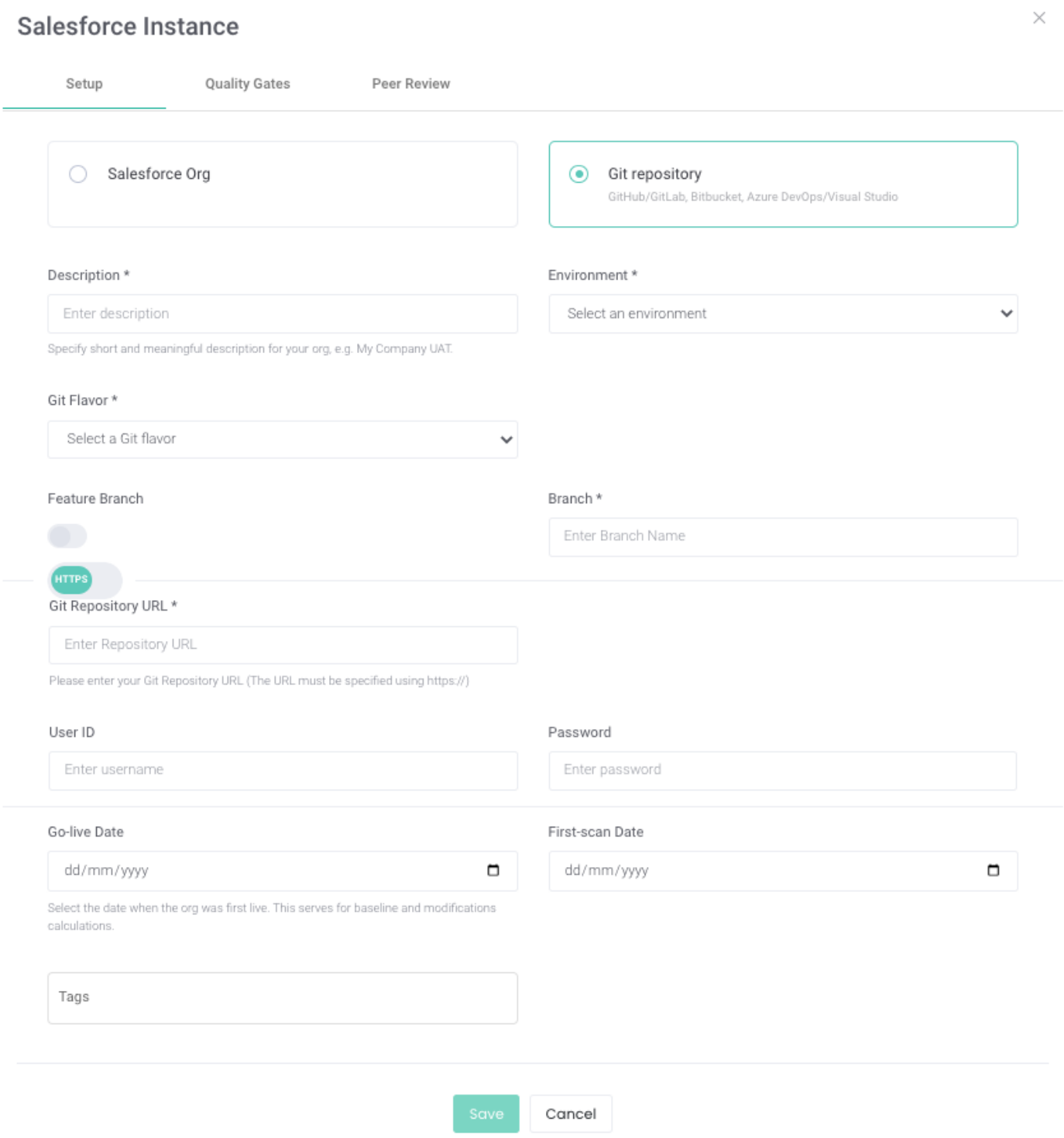
In order to be able to scan your repository, you need to point Quality Clouds to it.

→ To create an instance in Quality Clouds

1. Login to the Quality Clouds portal at https://portal.qualityclouds.com/.
2. Go to **Instances** section.
3. Select the Salesforce tab (if you use several SaaS with Quality Clouds).
4. Click **+ New instance**.
5. Select **Git repository**, and fill in the following information:
   - **Description** - Short and meaningful description of the instance. For example: MyCompany UAT
   - **Environment** - Environment type of the instance. This is used to add descriptive context to your instance.
   - **Git Flavor** - Git Repository type, to select among: GitHub/GitLab, Bitbucket, Azure DevOps/Visual Studio.
   - **Git Repository URL** - URL of the Git Repository. For example: https://github.com/myrepository.git.
   - **Feature Branch** - Enable if you want to scan a feature branch. When selected, the scan will report only differences between the specified feature branch and the reference branch. As feature branches names can vary, branch name will be requested before scanning.

- **Branch** - Name of the reference branch to scan.
- **User ID** - Username to access the Git Repository.
- **Password** - Password credential for the Git User.
- **Go-live Date** - Date on which the instance was first started, serves as a baseline for Org changes.
- **First-scan Date** - Date on which the first scan was first launched.
- **Tags** - Use tags to add specific information for better instance recognition

6. Click **Save**.

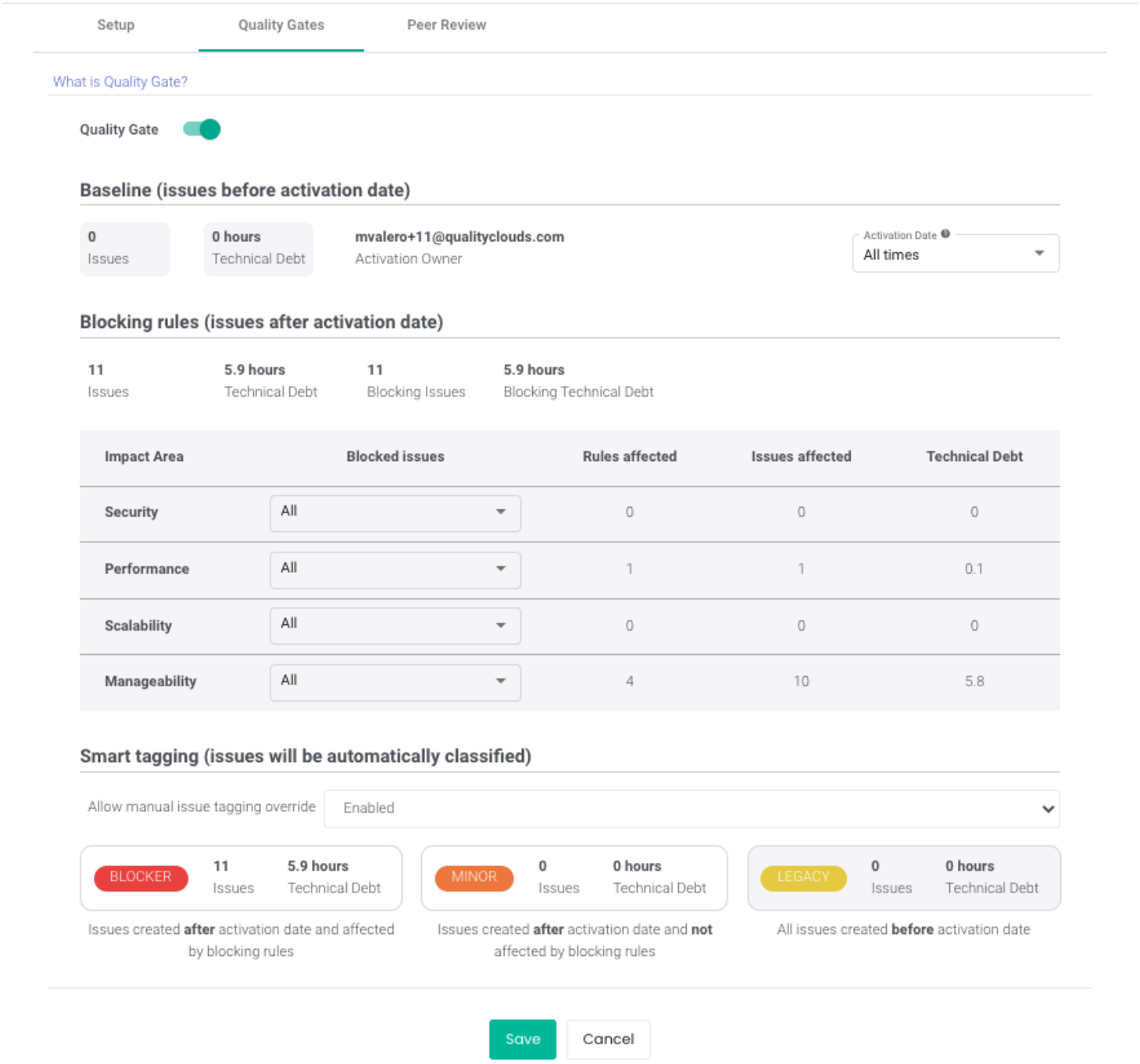


→ Configure the Quality Gates

1. When setting or editing an instance, click on the 'Quality Gates' tab.
2. Enable the Quality Gates toggle.
3. Add the Activation Date.

4. Configure the Blocking rules table and smart tagging.
5. Click '**Save**'.

Click **here** to learn how Quality Gates work.

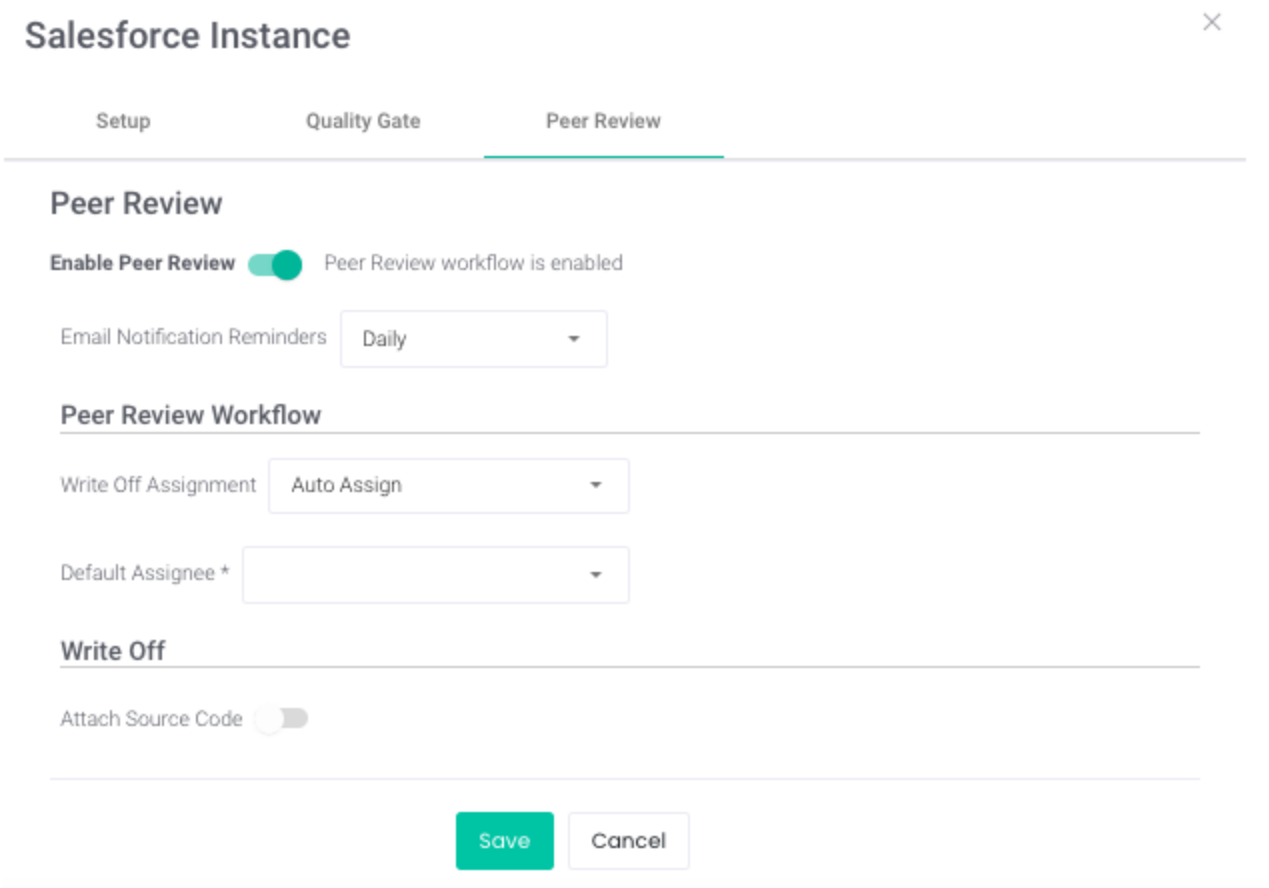


→ Configure the Peer Review

1. When setting or editing an instance, click on the 'Peer Review' tab.

2. Enable the Peer Review toggle.
3. Select when to get notified when Peer Reviews are pending: None, Daily, Weekly or Monthly.
4. In the Peer Review Workflow section select '**Write Off assignation**':
    - Manual Assign: Requests are unassigned, requiring the customer to select an approver manually from the Peer Review dashboard | *It will hide the Default Assignee drop-down menu.*
    - Auto Assign: All requests are automatically assigned to a predetermined approver | *It will show the Default Assignee and there won't be any other option than to select one person from the list.*
    - Developer Assign: The developer selects the approver responsible for validating the request.
5. Select the Default assignee email on the dropdown menu. Enable it if you want the default assignee to be notified when a write-off is assigned.
6. Enable or disable the Source Code toggle.
7. Click '**Save**'.

- Manual Assign will hide the Default Assignee drop-down menu.
- Auto Assign will show the Default Assignee and there won't be any other option than to select one person from the list.



You can now continue with the following steps:

1. Test connectivity.
2. Schedule scans or Run scans manually.

Optionally, you can also set up the Quality Clouds for Salesforce AppExchange.