Chapter 3: Basic Machine Setup

1 - Install Local Software

If you are admin on your machine, download Visual Studio Code from this link. Otherwise, use whatever your IT has to install software, whether it be Software Center, opening a ticket, or anything else of that ilk.

As long as you're doing that, you can also install a JDK like AZUL, as well as Git, and a nice terminal emulator.

Also remember to install the Salesforce CLI.

> These elements are all useful down the line, and doing all the setup at once avoids later issues.

2 - Configure the CLI

Opening your beautiful terminal emulator, run

```
sf update
```

You should see `@salesforce/cli: Updating CLI` run for a bit.

> If you see an error saying `sf` is not a command or program, something went wrong during the installation in step 1. Contact your IT (or check the installation page of the CLI if you're Admin or not in an enterprise context).

Once that's done, run

```
sf plugins install sfdmu sfdx-git-delta
```

> Because sgd is not signed, you will get a warning saying that "This plugin is not digitally signed and its authenticity cannot be verified". This is expected, and you will have to answer `y` (yes) to proceed with the installation.

Once you've done that, run:

`git config --global user.name "FirstName LastName"` replacing Firstname and Lastname with your own.

`git config --global user.email "email@server.tld"` replacing the email with yours

If you're running Windows - `git config --global core.autocrlf true`

If you're running Mac or Linux - `git config --global core.autocrlf input`

> The above commands tell git who you are, and how to handle line endings.
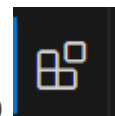> All of this setup has to be done once, and you will probably never touch it again.

Finally, run

`java --version`

> If you don't see an error, and you see something like `openjdk 21.0.3 2024-04-16 LT` then you installed Zulu properly and you're fine.

3 - Configure VSCode

Open up VSCode.

Go to the Extensions in the side panel (it looks like three squares) and search for "Salesforce", then install

- Salesforce Extensions Pack
- Salesforce Extensions Pack (Expanded)
- Salesforce Package.xml Generator for VS Code
- Salesforce CLI Command Builder
- Salesforce XML Formatter

Then search for Atlassian and install "Jira and Bitbucket (Atlassian Labs)".

Finally, search for and install "GitLens - Git supercharged".

Then go to **Preferences > Settings > Salesforcedx-vscode-core: Detect Conflicts At Sync** and check this checkbox.

Once all this is done, I recommend you go to the side panel, click on Source Control, and drag-and-drop both the Commit element and the topmost element to the right of the editor.

> All this setup allows you to have more visual functions and shortcuts. If you fail to install some elements, it cannot be guaranteed that you will have all the elements you are supposed to.

> This concludes basic machine setup.
> All of this should not have to be done again on an already configured machine.