

Copado Data Deploy Quick Start

Copado's enhanced data deployment functionality allows you to easily deploy a data set to a destination Salesforce org with a simple tool.

Here are some of the advantages of this new feature:

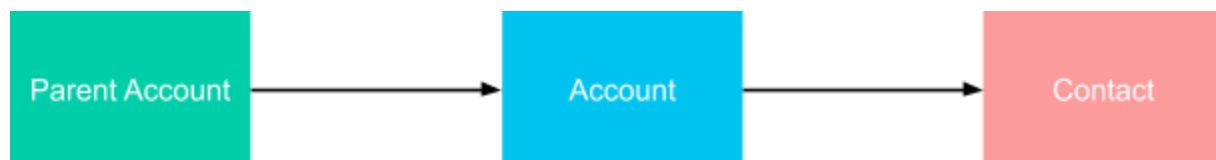
- You don't require a high technical knowledge to deploy data.
- Data templates can be saved and reused in other deployments, thus saving you a lot of time.
- Since this is a more automated process, the probability of introducing an error is considerably reduced.

When deploying using a data step, there are two things you have to bear in mind:

- You need to create an external Id field for each of the objects involved in the data deployment.
 - Make sure you populate a value for this field in all records or at least the ones you need to deploy.
- Your profile needs access to the objects and fields in both the source and the destination orgs.

Use Case #1

For the purpose of this use case, we will be deploying an account together with its related parent account and contacts:



When creating the data template select the org, in the **Template Source Org** lookup field, where we have the data we want to move. Then select the **Account** object in the **Main Object** dropdown:

Data Template
New Data Template

Export Template Save Template

Data Template Name
DV Account with a Simple Parent Account

Main Object
Account

Active
Yes

Template Details Object Fields Parent Objects Child Objects Main Object Filter

Data Template Name
DV Account with a Simple Parent Account

Description

Template Source Org
DV DevB

Main Object
Account

Active
☒

Continue on Error
Continue deployment until blocker issue

Attachment Options
No Attachments

Match Owners
☒

Match Record Type
☒

When matching record types, the records in the target Org are assigned to the same record type as in the source Org, if found. Otherwise they are assigned to the default record type in the deploying user's profile.

In the **Object Fields** tab, the first field you will find is the external Id field. Make sure this field is checked.

All other fields will be also preselected, but you can uncheck any fields you don't want to deploy:

Template Details **Object Fields** Parent Objects Child Objects Main Object Filter

Search... Refresh

<input checked="" type="checkbox"/>	SF Att	Field Label	API Name	Data Type	Use as External ID	Field Content Update
<input checked="" type="checkbox"/>	XID	Custom External Id	Custom_External_Id__c	string	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>		Account Name	Name	string	<input type="checkbox"/>	None
<input checked="" type="checkbox"/>		Account Description	Description	textarea	<input type="checkbox"/>	None
<input checked="" type="checkbox"/>		Account Fax	Fax	phone	<input type="checkbox"/>	None
<input checked="" type="checkbox"/>		Account Number	AccountNumber	string	<input type="checkbox"/>	None
<input checked="" type="checkbox"/>		Account Phone	Phone	phone	<input type="checkbox"/>	None
<input checked="" type="checkbox"/>		Account Rating	Rating	picklist	<input type="checkbox"/>	None
<input checked="" type="checkbox"/>		Account Site	Site	string	<input type="checkbox"/>	None
<input checked="" type="checkbox"/>		Account Source	AccountSource	picklist	<input type="checkbox"/>	None

We need to build a data template per object, so having this in mind, let's create a template for the parent Account and child Contact objects as well.

In the **Parent Objects** tab, select the **Parent Account** object and then select an existing account template from the dropdown. If you don't have one yet, you can click on **Create new data template** to quickly create a new one:

The screenshot shows the 'New Data Template' interface in Copado. At the top, there are buttons for 'Export Template' and 'Save Template'. Below this, a summary bar shows the template name 'DV Account with a Simple Parent Account', the main object 'Account', and its status 'Active'.

The main section has tabs for 'Template Details', 'Object Fields', 'Parent Objects' (selected), 'Child Objects', and 'Main Object Filter'. A search bar is present above a table of objects.


SF Att	Field Label	Field API Name	Object Label	Object API Name	Deployment Template *
<input type="checkbox"/>	D&B Company ID	DandbCompanyId	D&B Company	DandBCompany	
<input type="checkbox"/>	Master Record ID	MasterRecordId	Account	Account	
<input checked="" type="checkbox"/>	Parent Account ID	ParentId	Account	Account	<div>DV Parent Account</div>

Below the table, it says 'Showing 1 to 3 of 3 entries' and 'Show 10 entries'. A dropdown menu is open for the 'Parent Account ID' row, showing options: 'DV Account', 'DV Parent Account', 'DV Simple Account', and 'Create new Data Template'. Navigation buttons 'Previous', '1', and 'Next' are at the bottom right.

In the **Child Objects** tab, select the **Contact** object and the template we have already created:

Template Details	Object Fields	Parent Objects	Child Objects	Main Object Filter
Search...				
Refresh				
Object Label	Object API Name	Relationship Name	Deployment Template	
<input type="checkbox"/> Task	Task	Tasks		
<input type="checkbox"/> Order	Order	Orders		
<input type="checkbox"/> Opportunity	Opportunity	Opportunities		
<input type="checkbox"/> Event	Event	Events		
<input type="checkbox"/> Contract	Contract	Contracts		
<input checked="" type="checkbox"/> Contact	Contact	Contacts	DV Contact	
<input type="checkbox"/> Case	Case	Cases		
<input type="checkbox"/> Asset	Asset	Assets		
<input type="checkbox"/> Account	Account	ChildAccounts		

Let's go back to the **Template Details** page and flag the **Active** checkbox to activate our template:

 Data Template
New Data Template

Export TemplateSave Template

Data Template Name
DV Account with a Simple Parent Account

Main Object
Account

Active
Yes

Template DetailsObject FieldsParent ObjectsChild ObjectsMain Object Filter

Data Template Name
DV Account with a Simple Parent Account

Description

Template Source Org
DV DevB

Main Object
Account

Active
☒

Continue on Error
Continue deployment until blocker issue

Attachment Options
No Attachments

Match Owners
☒

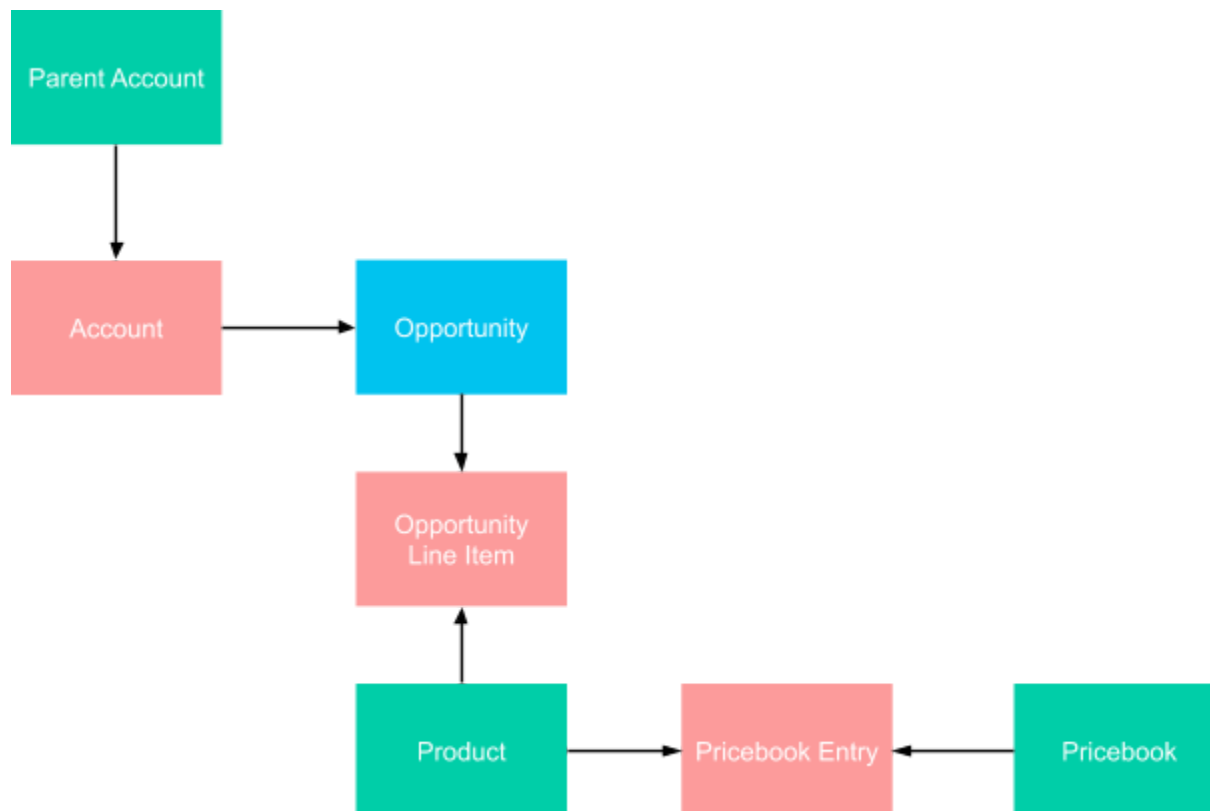
Match Record Type
☒

When matching record types, the records in the target Org are assigned to the same record type as in the source Org, if found. Otherwise they are assigned to the default record type in the deploying user's profile.

Done! We're now ready to deploy our template. Check out the article [Deployment Step: Data Template](#) to learn how to do this.

Use Case #2

For the purpose of this use case, we will be deploying an opportunity together with its related accounts, products and pricebooks. Let's take a look at the diagram below to see the records we need to deploy:



Once we are clear on what we need to move, we can go ahead and build our data template.

When creating the data template, we need to select the org where we have the data we want to move as **Template Source Org** and the **Opportunity** object as the **Main Object**:

Data Template
New Data Template

Export Template Save Template

Data Template Name: DV Opportunity
Main Object: Opportunity
Active: Yes

Template Details | Object Fields | Parent Objects | Child Objects | Main Object Filter

Data Template Name: DV Opportunity
Continue on Error: Continue deployment until blocker issue
Description: Salesforce Opportunity template linked to Accounts, Opportunity Line Items, Products and Pricebooks
Attachment Options: No Attachments
Match Owners: ☒
Match Record Type: ☒
When matching record types, the records in the target Org are assigned to the same record type as in the source Org, if found. Otherwise they are assigned to the default record type in the deploying user's profile.
Template Source Org: DV DevB
Main Object: Opportunity
Active: ☒

In the **Object Fields** tab, the first field you will find is the external Id field. Make sure this field is checked.

All other fields will be also preselected, but you can uncheck any fields you don't want to deploy:

Template Details | **Object Fields** | Parent Objects | Child Objects | Main Object Filter

Search... Refresh

<input checked="" type="checkbox"/>	SF Att	Field Label	API Name	Data Type	Use as External ID	Field Content Update
<input checked="" type="checkbox"/>	XID	Custom External Id	Custom_External_Id__c	string	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	*	Close Date	CloseDate	date	<input type="checkbox"/>	None
<input checked="" type="checkbox"/>	*	Closed	IsClosed	boolean	<input type="checkbox"/>	None
<input checked="" type="checkbox"/>	*	Forecast Category	ForecastCategory	picklist	<input type="checkbox"/>	None
<input checked="" type="checkbox"/>	*	Has Line Item	HasOpportunityLineItem	boolean	<input type="checkbox"/>	None
<input checked="" type="checkbox"/>	*	Has Open Activity	HasOpenActivity	boolean	<input type="checkbox"/>	None
<input checked="" type="checkbox"/>	*	Has Overdue Task	HasOverdueTask	boolean	<input type="checkbox"/>	None
<input checked="" type="checkbox"/>	*	Name	Name	string	<input type="checkbox"/>	None
<input checked="" type="checkbox"/>	*	Private	IsPrivate	boolean	<input type="checkbox"/>	None

In the **Parent Objects** tab we will select the **Account** with the corresponding account with parent account template that we have already created. If you don't have it yet, follow the steps in Use Case #1 to create it:

The screenshot shows the 'New Data Template' interface with the 'Parent Objects' tab selected. The top section displays the template name 'DV Opportunity', the main object 'Opportunity', and its active status. Below this, a table lists parent objects. The first row is selected, showing 'Account ID' as the field label and 'Account' as the object label. A dropdown menu for 'Deployment Template' is open, showing 'DV Account with a Simpl...' as the selected option.

Search...	SF Att	Field Label	Field API Name	Object Label	Object API Name	Deployment Template
<input checked="" type="checkbox"/>		Account ID	AccountId	Account	Account	DV Account with a Simpl...

In the **Child Objects** tab, we are going to select the **Opportunity Line Item** and an existing template from the dropdown. If you don't have one yet, you can click on **Create new data template** to quickly create a new one:

The screenshot shows the 'New Data Template' interface with the 'Child Objects' tab selected. The top section displays the template name 'DV Opportunity', the main object 'Opportunity', and its active status. Below this, a table lists child objects. The second row is selected, showing 'Opportunity Product' as the object label, 'OpportunityLineItem' as the object API name, and 'OpportunityLineItems' as the relationship name. A dropdown menu for 'Deployment Template' is open, showing 'DV Opportunity Line Item' as the selected option.

Search...	Object Label	Object API Name	Relationship Name	Deployment Template
<input type="checkbox"/>	Task	Task	Tasks	
<input checked="" type="checkbox"/>	Opportunity Product	OpportunityLineItem	OpportunityLineItems	DV Opportunity Line Item
<input type="checkbox"/>	Event	Event	Events	

Showing 1 to 3 of 3 entries Show 10 entries Previous 1 Next

In the **Opportunity Line Item** template, navigate to the **Parent Objects** tab and select the **Price Book Entry ID** and an existing template from the dropdown. If you don't have one yet, you can click on **Create new data template** to quickly create a new one:

Template Details

Object Fields

Parent Objects


Child Objects

Main Object Filter

Search...

<input type="checkbox"/>	SF Att	Field Label	Field API Name	Object Label	Object API Name	Deployment Template
<input type="checkbox"/>	*	Opportunity ID	OpportunityId	Opportunity	Opportunity	
<input checked="" type="checkbox"/>		Price Book Entry ID	PricebookEntryId	Price Book Entry	PricebookEntry	<div>Price Book Entry</div> <div></div>

Navigate to the **Price Book Entry** data template and select the **Pricebook ID** in the **Parent Objects** tab and an existing template from the dropdown. If you don't have one yet, you can click on **Create new data template** to quickly create a new one:



Data Template

New Data Template

Export Template

Save Template

Data Template Name

Main Object

Active

Price Book Entry

PricebookEntry

Yes

<input type="checkbox"/>	SF Att	Field Label	Field API Name	Object Label	Object API Name	Deployment Template
<input checked="" type="checkbox"/>	*	Price Book ID	Pricebook2Id	Price Book	Pricebook2	<div>Select Template</div>
<input type="checkbox"/>	*	Product ID	Product2Id	Product	Product2	

Showing 1 to 2 of 2 entries

Show

10

entries

Previous

1

Next

Make sure all the templates have an External Id field selected.

We can now go to the **Main Object Filter** tab of the Opportunity template and select a field to filter our query. For example, we can select the **Created Date** or **Last Modified Date** fields, then the **equals** operator and then **Last Month** or **Last Year**:

The screenshot shows the 'Main Object Filter' tab of the 'New Data Template' interface. At the top, there's a header with a rocket icon and the text 'Data Template New Data Template'. Below this is a summary table:

Data Template Name	Main Object	Active
DV Opportunity	Opportunity	Yes

Below the table are tabs: 'Template Details', 'Object Fields', 'Parent Objects', 'Child Objects', and 'Main Object Filter' (which is selected). Under the 'Main Object Filter' tab, there is a list of filters. The first filter is:

1. Created Date (dropdown) equals (dropdown) Last Year (dropdown)

There is a red trash icon to the right of the filter list.

Let's go back to the **Template Details** page and flag the **Active** checkbox to activate our template:

The screenshot shows the 'Template Details' tab of the 'New Data Template' interface. At the top, there's a header with a rocket icon and the text 'Data Template New Data Template'. On the right, there are two buttons: 'Export Template' and 'Save Template'. Below this is a summary table:

Data Template Name	Main Object	Active
DV Opportunity	Opportunity	Yes

Below the table are tabs: 'Template Details' (which is selected), 'Object Fields', 'Parent Objects', 'Child Objects', and 'Main Object Filter'. Under the 'Template Details' tab, there are several form fields:

- Data Template Name**: DV Opportunity
- Description**: Salesforce Opportunity template linked to Accounts, Opportunity Line Items, Products and Pricebooks
- Template Source Org**: DV DevB
- Main Object**: Opportunity
- Active**: ☒
- Continue on Error**: Continue deployment until blocker issue
- Attachment Options**: No Attachments
- Match Owners**: ☒
- Match Record Type**: ☒

A tooltip is visible next to the 'Match Record Type' checkbox, stating: 'When matching record types, the records in the target Org are assigned to the same record type as in the source Org, if found. Otherwise they are assigned to the default record type in the deploying user's profile.'

Done! We're now ready to deploy our template. Check out the article [Deployment Step: Data Template](#) to learn how to do this.

Piece of cake? Navigate to the *Copado Data Deploy* section to learn more about [data templates](#) and how to build a data template.