

# 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:

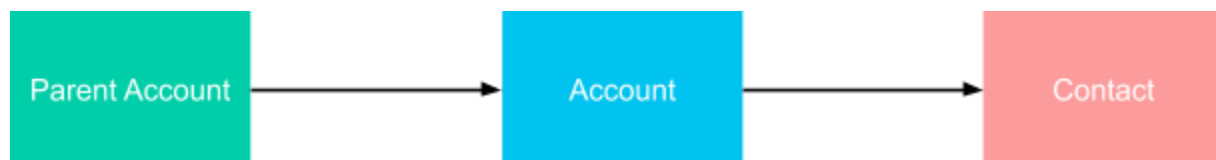
- You don't require a high technical knowledge to deploy data.
- Data templates can be saved and reused in other deployments, thus saving you a lot of time.
- Since this is a more automated process, the probability of introducing an error is considerably reduced.

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:

The screenshot shows the 'Data Template' configuration interface. At the top, there are buttons for 'Show Relationship Diagram', 'Clone Template', 'Export Template', and 'Save Template'. Below this, a summary table shows: Data Template Name: Account with a Simple Parent Account; Main Object: Account; Active: No.

The 'Template Details' tab is active, showing the following configuration options:

- Data Template Name:** Account with a Simple Parent Account
- Continue on Error:** Continue deployment until blocker issue
- Description:** (Empty text area)
- Select Attachment Type:** Files (Lightning) (selected), Attachments (Classic)
- Attachment Actions:** No Attachments
- Match Owners:**
- Match Record Type:**
- Template Source Org:** Dev 1
- Main Object:** Account
- 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:


The 'Object Fields' tab is active, displaying a table of fields for the Account object. A search bar is at the top left, and a 'Refresh' button is at the top right. The table has columns for 'SF Att', 'Field Label', 'API Name', 'Data Type', 'Use as External ID', and 'Field Content Update'.

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


Data Template

Account with a Simple Parent Account

Show Relationship Diagram
Clone Template
Export Template
Save Template

---

Data Template Name  
Account with a Simple Parent Account
Main Object  
Account
Active  
Yes

---

Template Details
Object Fields
Parent Objects
Child Objects
Main Object Filter

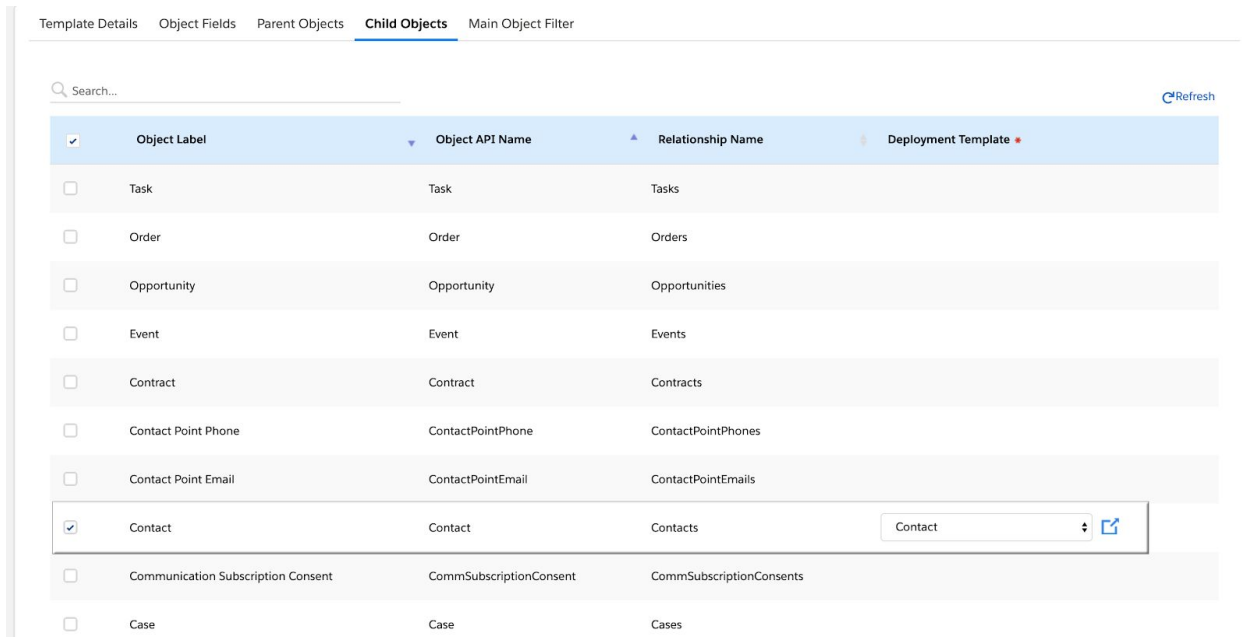
Refresh

<input type="checkbox"/>	SF Att	Field Label	Field API Name	Object Label	Object API Name	Deployment Template
<input type="checkbox"/>		Account Manager	Account_Manager__c	User	User	
<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 style="border: 1px solid #ccc; padding: 2px;">                     Parent Accounts                 </div> <div style="border: 1px solid #ccc; padding: 2px; margin-top: 2px;">                     Parent Accounts                 </div> <div style="border: 1px solid #ccc; padding: 2px; margin-top: 2px; color: #0070c0;">                     Create new Data Template                 </div>

Showing 1 to 4 of 4 entries
Show  entries

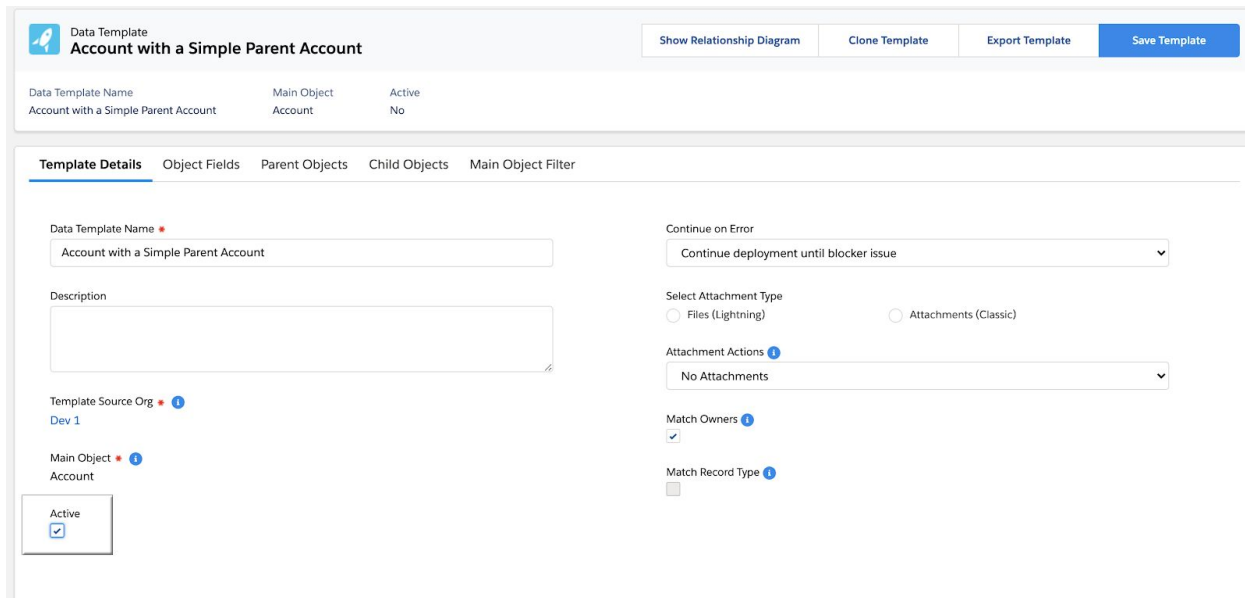
Previous
1
Next

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



<input checked="" type="checkbox"/>	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 type="checkbox"/>	Contact Point Phone	ContactPointPhone	ContactPointPhones	
<input type="checkbox"/>	Contact Point Email	ContactPointEmail	ContactPointEmails	
<input checked="" type="checkbox"/>	Contact	Contact	Contacts	Contact
<input type="checkbox"/>	Communication Subscription Consent	CommSubscriptionConsent	CommSubscriptionConsents	
<input type="checkbox"/>	Case	Case	Cases	

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



**Data Template**  
Account with a Simple Parent Account

Buttons: Show Relationship Diagram, Clone Template, Export Template, Save Template

Data Template Name: Account with a Simple Parent Account  
Main Object: Account  
Active: No

Navigation: Template Details, Object Fields, Parent Objects, Child Objects, Main Object Filter

Data Template Name: Account with a Simple Parent Account

Description: [Empty text area]

Template Source Org: Dev 1

Main Object: Account

Active:

Continue on Error: Continue deployment until blocker issue

Select Attachment Type: Files (Lightning) (selected), Attachments (Classic)

Attachment Actions: No Attachments

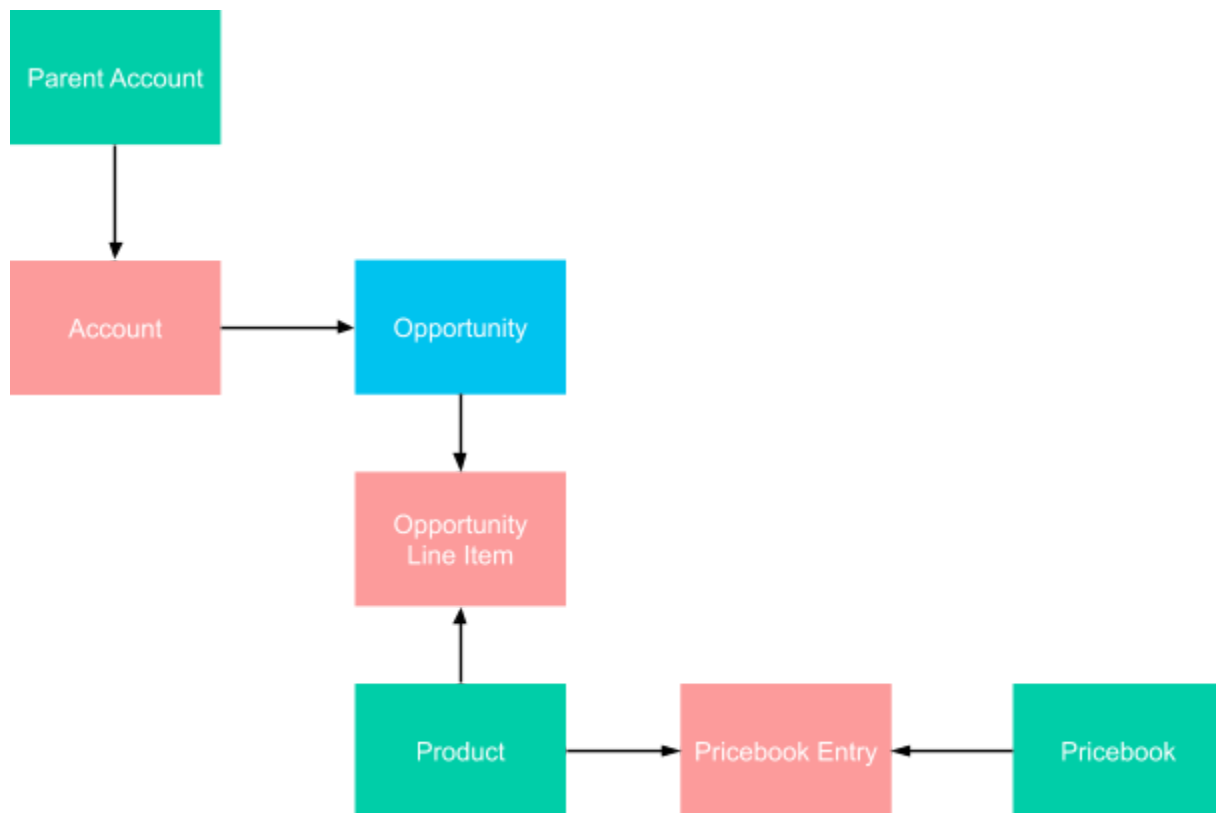
Match Owners:

Match Record Type:

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

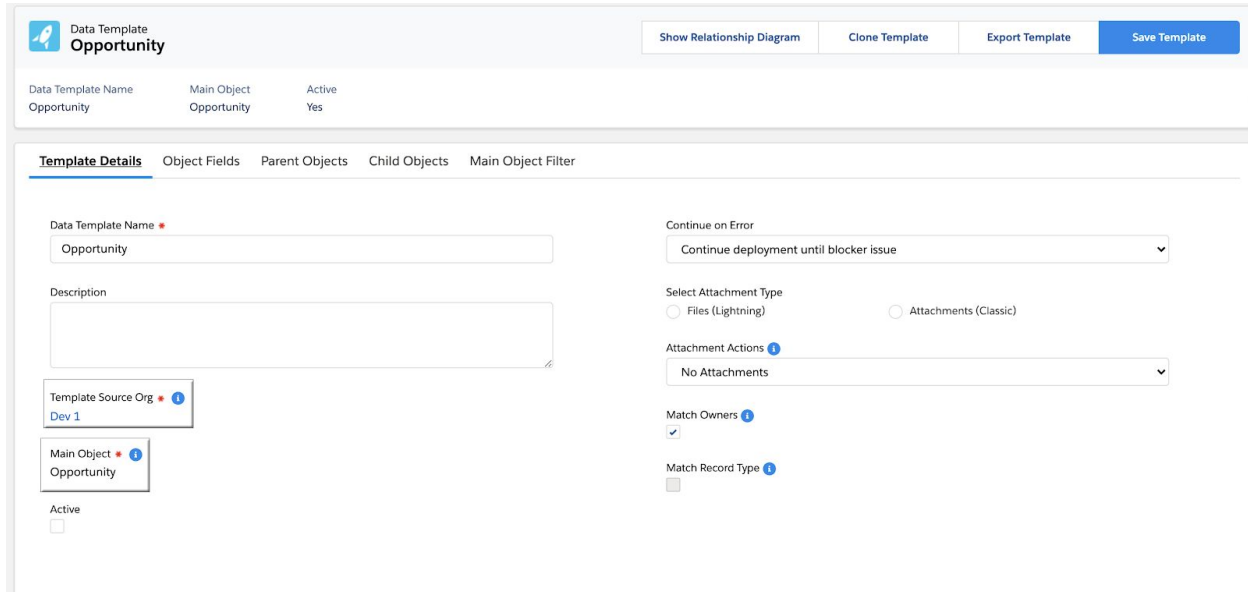
## Use Case #2

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 Opportunity**

Show Relationship Diagram Clone Template Export Template Save Template

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

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

Data Template Name: Opportunity

Description: [Empty text area]

Template Source Org: Dev 1

Main Object: Opportunity

Active:

Continue on Error: Continue deployment until blocker issue

Select Attachment Type:  Files (Lightning)  Attachments (Classic)

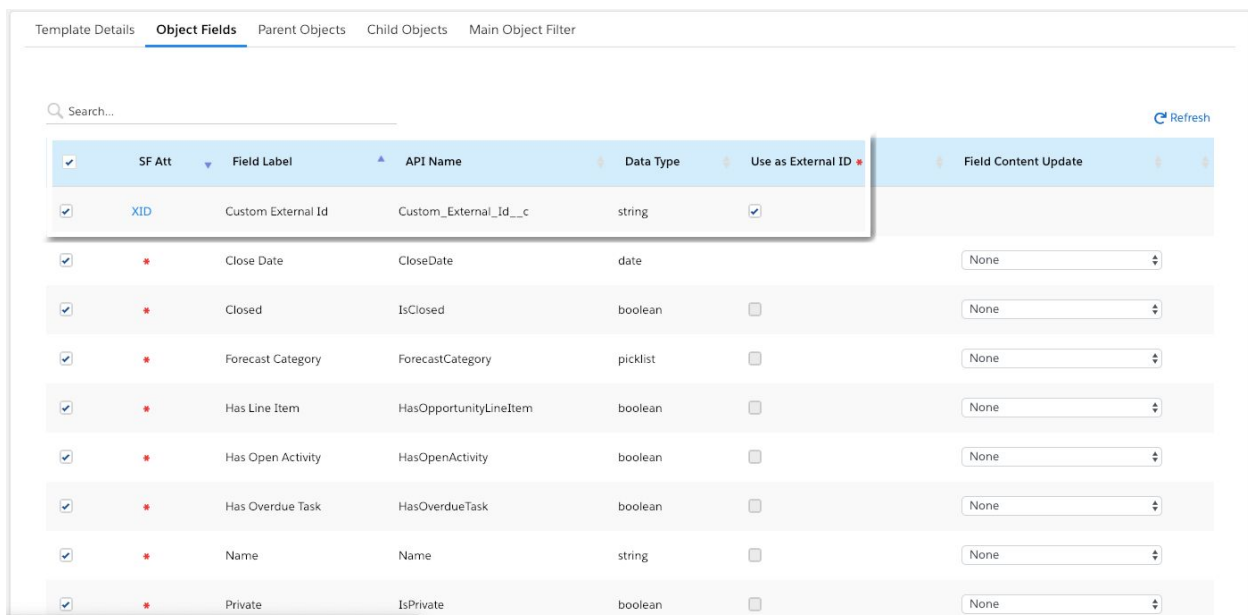
Attachment Actions: No Attachments

Match Owners:

Match Record Type:

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:

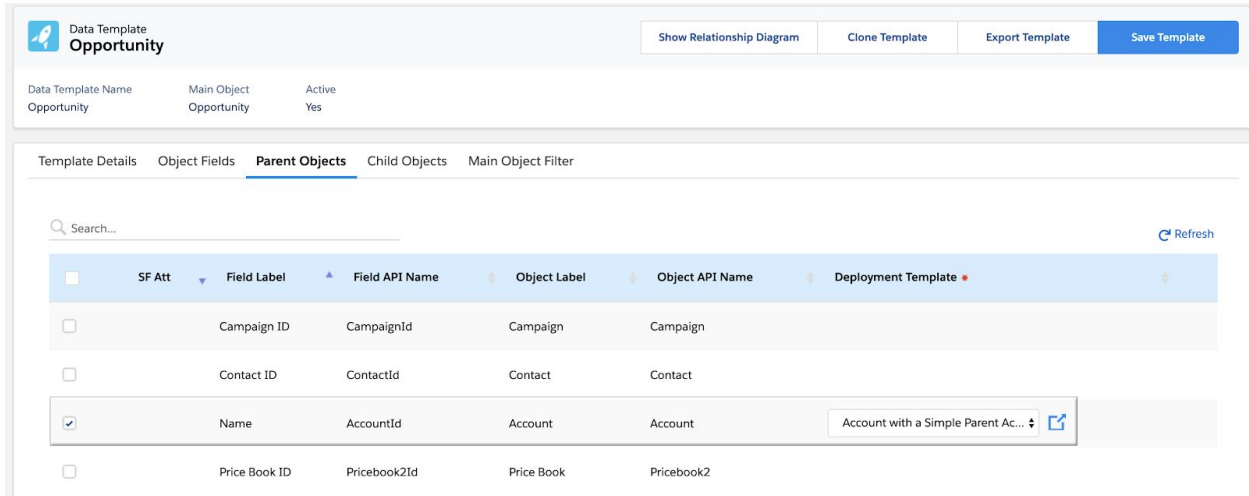


Template Details | **Object Fields** | Parent Objects | Child Objects | Main Object Filter

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

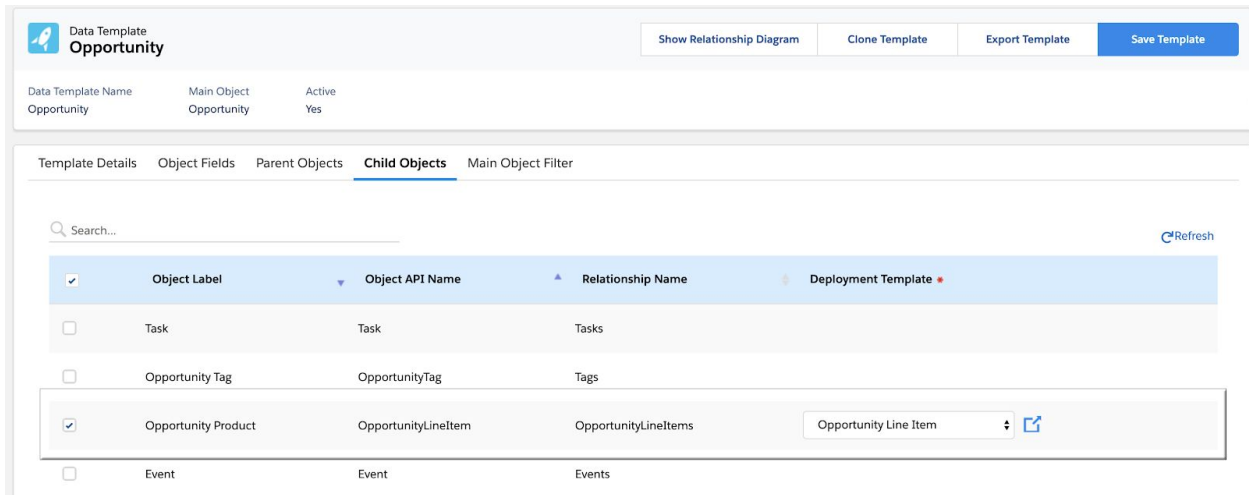
In the **Parent Objects** tab we will select the **Account** with the corresponding account with parent account template that we have already created. If you don't have it yet, follow the steps in Use Case #1 to create it:



The screenshot shows the 'Parent Objects' tab for the 'Opportunity' data template. The interface includes a search bar, a refresh button, and a table with columns: SF Att, Field Label, Field API Name, Object Label, Object API Name, and Deployment Template. The 'Name' row is selected, and its deployment template is set to 'Account with a Simple Parent Ac...'. Other rows include Campaign ID, Contact ID, and Price Book ID.

SF Att	Field Label	Field API Name	Object Label	Object API Name	Deployment Template
<input type="checkbox"/>	Campaign ID	CampaignId	Campaign	Campaign	
<input type="checkbox"/>	Contact ID	ContactId	Contact	Contact	
<input checked="" type="checkbox"/>	Name	AccountId	Account	Account	Account with a Simple Parent Ac...
<input type="checkbox"/>	Price Book ID	Pricebook2Id	Price Book	Pricebook2	

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 'Child Objects' tab for the 'Opportunity' data template. The interface includes a search bar, a refresh button, and a table with columns: Object Label, Object API Name, Relationship Name, and Deployment Template. The 'Opportunity Product' row is selected, and its deployment template is set to 'Opportunity Line Item'. Other rows include Task, Opportunity Tag, and Event.

Object Label	Object API Name	Relationship Name	Deployment Template
<input type="checkbox"/>	Task	Task	Tasks
<input type="checkbox"/>	Opportunity Tag	OpportunityTag	Tags
<input checked="" type="checkbox"/>	Opportunity Product	OpportunityLineItem	Opportunity Line Item
<input type="checkbox"/>	Event	Event	Events

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	Price Book Entry

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 **Price Book Entry** | Show Relationship Diagram | Clone Template | Export Template | Save Template

Data Template Name: Price Book Entry | Main Object: PricebookEntry | Active: Yes

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

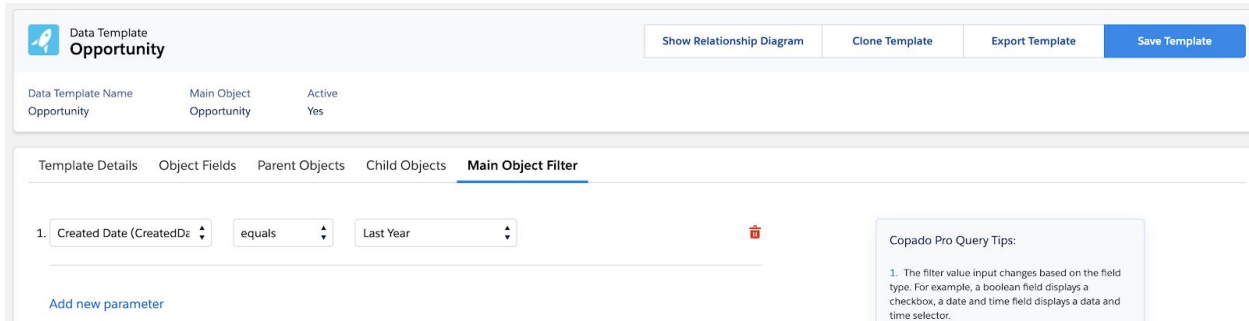
Search... Refresh

<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	Price Book

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' configuration for the 'Opportunity' data template. At the top, there are buttons for 'Show Relationship Diagram', 'Clone Template', 'Export Template', and 'Save Template'. Below these is a table with the following data:

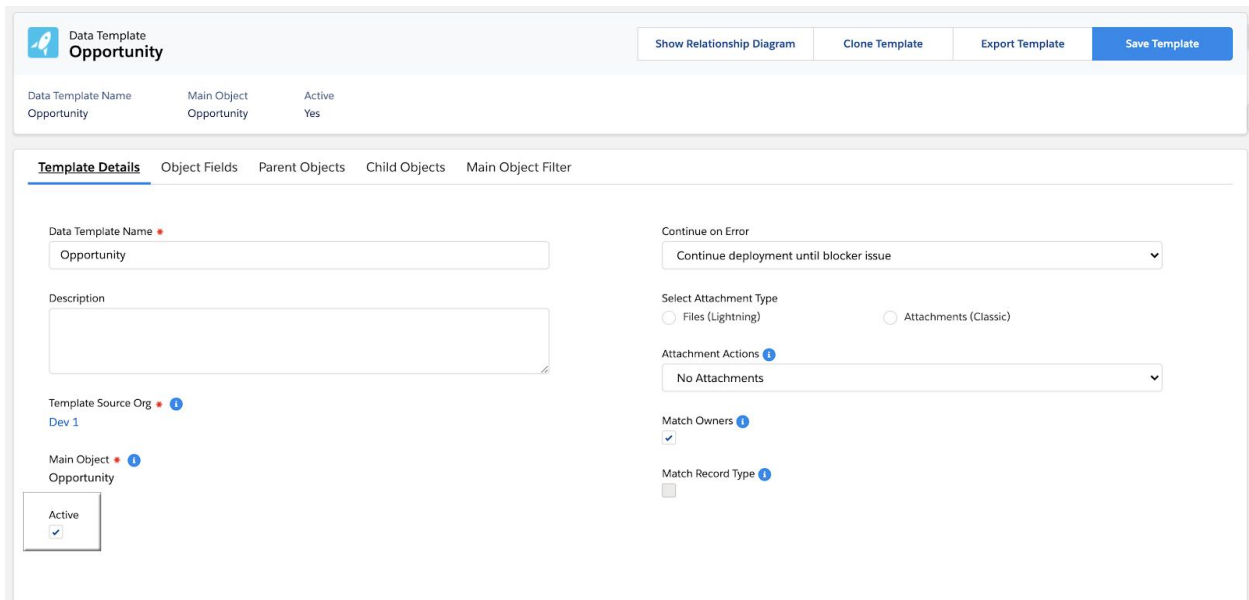
Data Template Name	Main Object	Active
Opportunity	Opportunity	Yes

The 'Main Object Filter' tab is active, showing a single filter rule: '1. Created Date (CreatedDate) equals Last Year'. There is a trash icon to the right of the rule and a link 'Add new parameter' below it. A 'Copado Pro Query Tips' box on the right contains the following text:

**Copado Pro Query Tips:**

- The filter value input changes based on the field type. For example, a boolean field displays a checkbox, a date and time field displays a data and time selector.

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



The screenshot shows the 'Template Details' configuration for the 'Opportunity' data template. At the top, there are buttons for 'Show Relationship Diagram', 'Clone Template', 'Export Template', and 'Save Template'. Below these is a table with the following data:

Data Template Name	Main Object	Active
Opportunity	Opportunity	Yes

The 'Template Details' tab is active, showing the following configuration options:

- Data Template Name:** Opportunity
- Description:** (Empty text area)
- Template Source Org:** Dev 1
- Main Object:** Opportunity
- Active:**
- Continue on Error:** Continue deployment until blocker issue
- Select Attachment Type:** Files (Lightning) (selected), Attachments (Classic)
- Attachment Actions:** No Attachments
- Match Owners:**
- Match Record Type:**



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.