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:

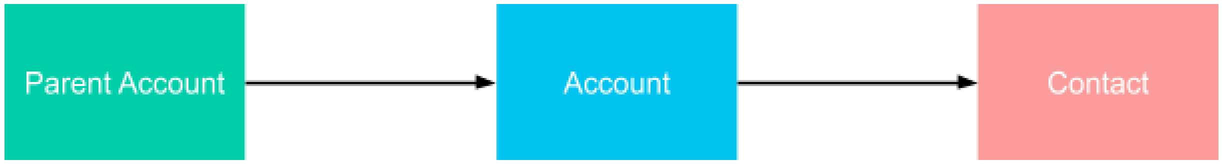
- You don't require a high technical knowledge to deploy data.
- Data templates can be saved and reused in other deployments, thus saving you a lot of time.
- Since this is a more automated process, the probability of introducing an error is considerably reduced.

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

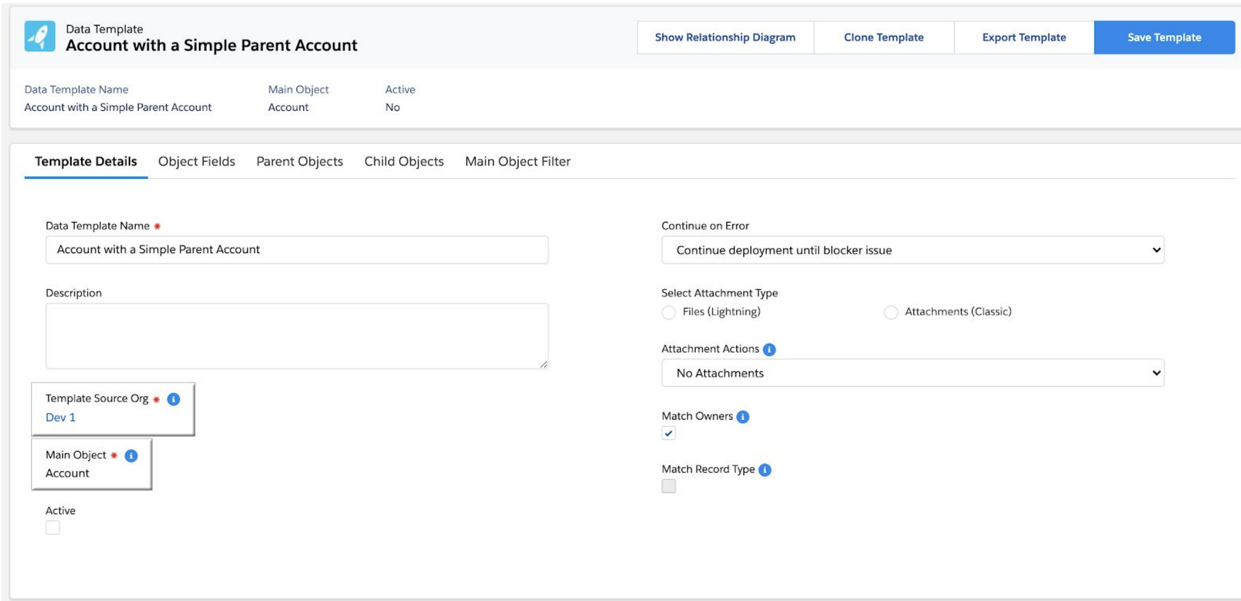
- You need to create an external Id field for each of the objects involved in the data deployment.
  - Make sure you populate a value for this field in all records or at least the ones you need to deploy.
- Your profile needs access to the objects and fields in both the source and the destination orgs.

Use Case #1

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

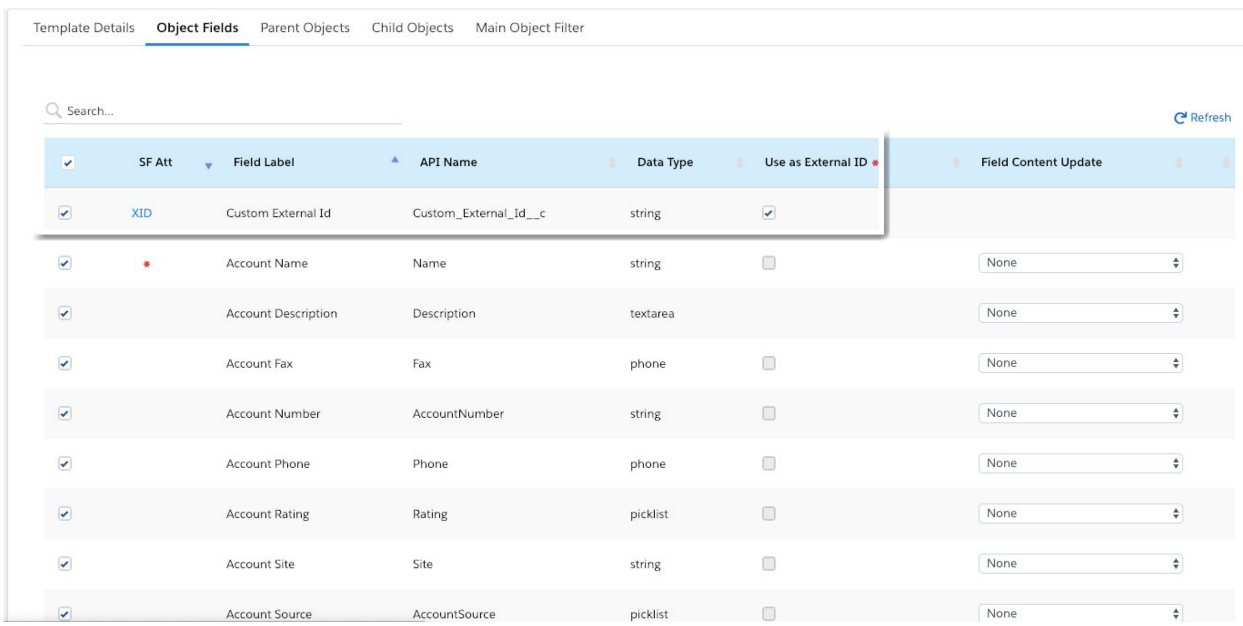


When creating the data template select the org, in the **Template Source Org** lookup field, where we have the data we want to move. Then select the **Account** object in the **Main Object** dropdown:



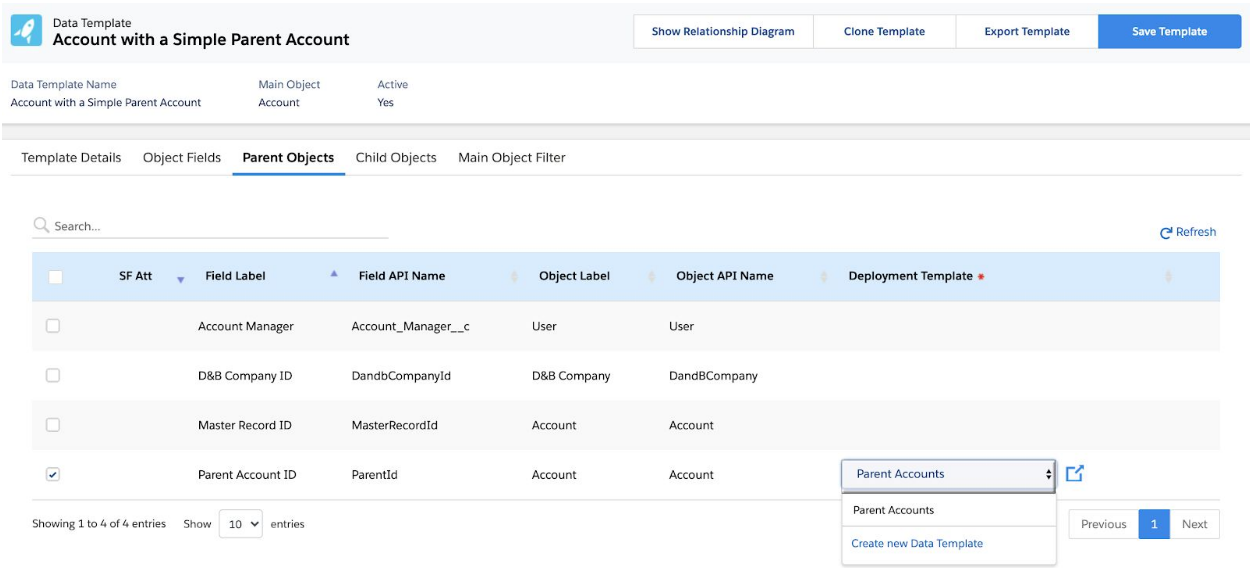
In the **Object Fields** tab, the first field you will find is the external Id field. Make sure this field is checked.

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

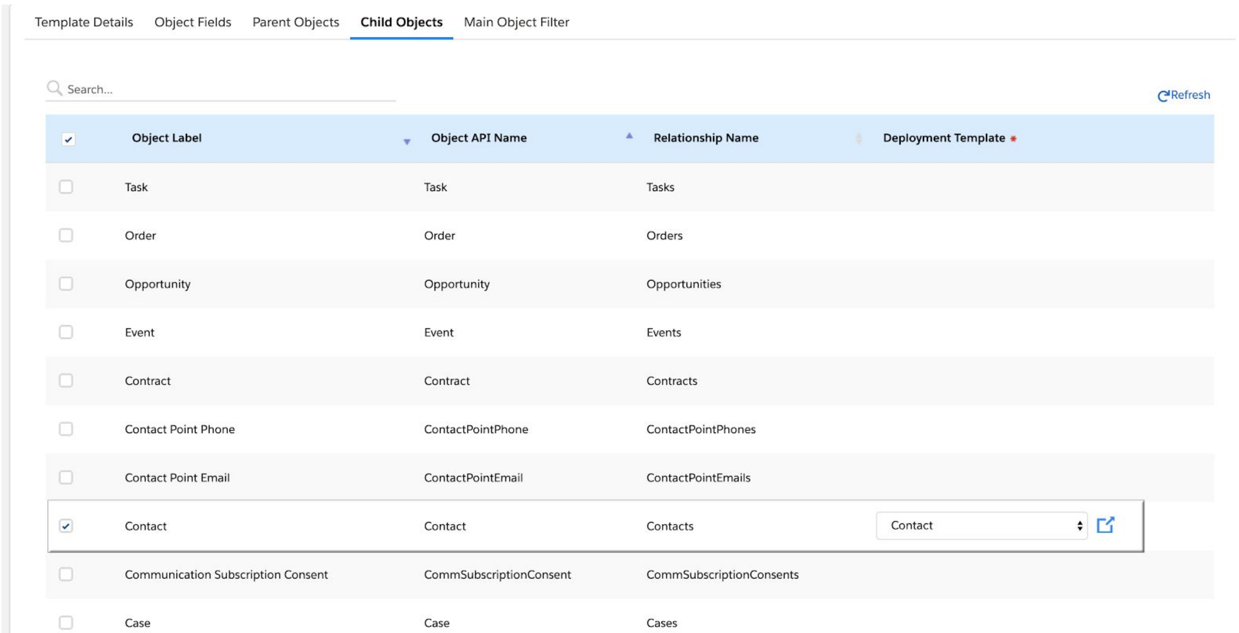


We need to build a data template per object, so having this in mind, let's create a template for the parent Account and child Contact objects as well.

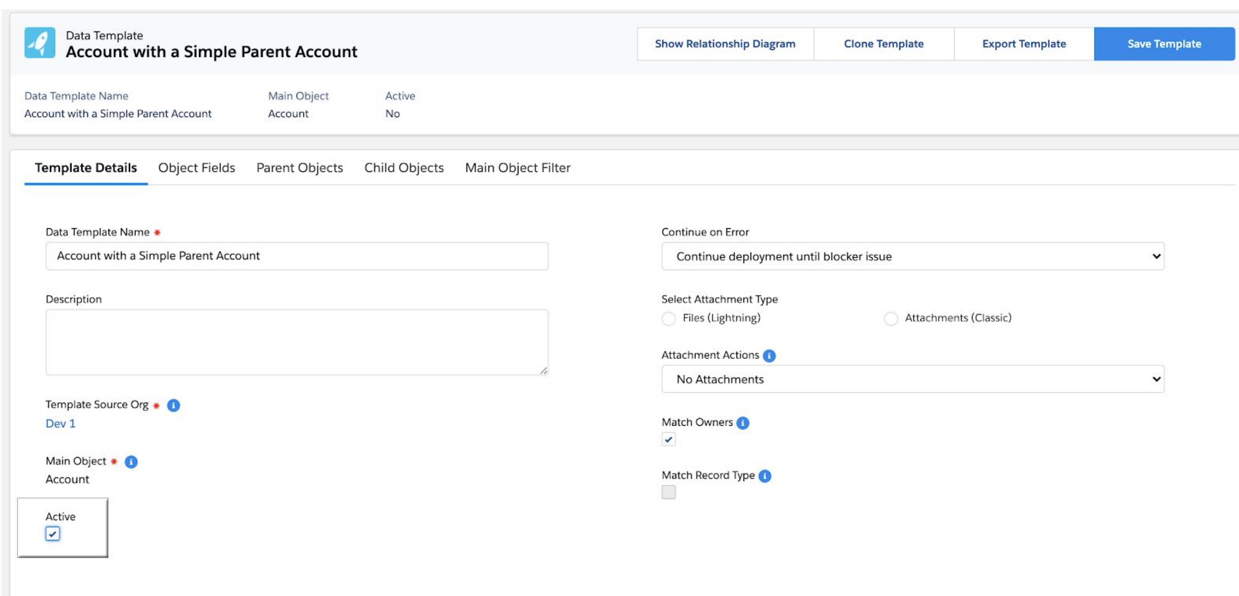
In the **Parent Objects** tab, select the **Parent Account** object and then select an existing account template from the dropdown. If you don't have one yet, you can click on **Create new data template** to quickly create a new one:



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



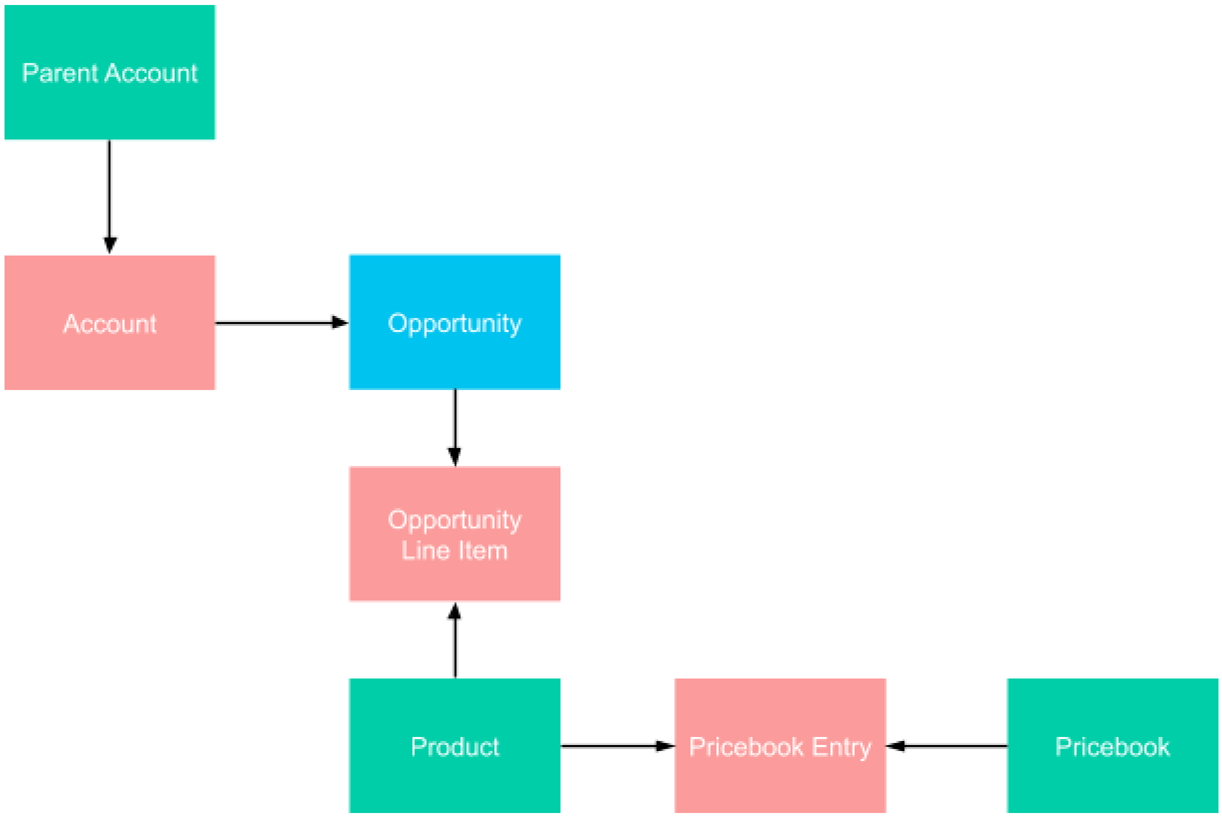
Let's go back to the **Template Details** page and flag the **Active** checkbox to activate our template:



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

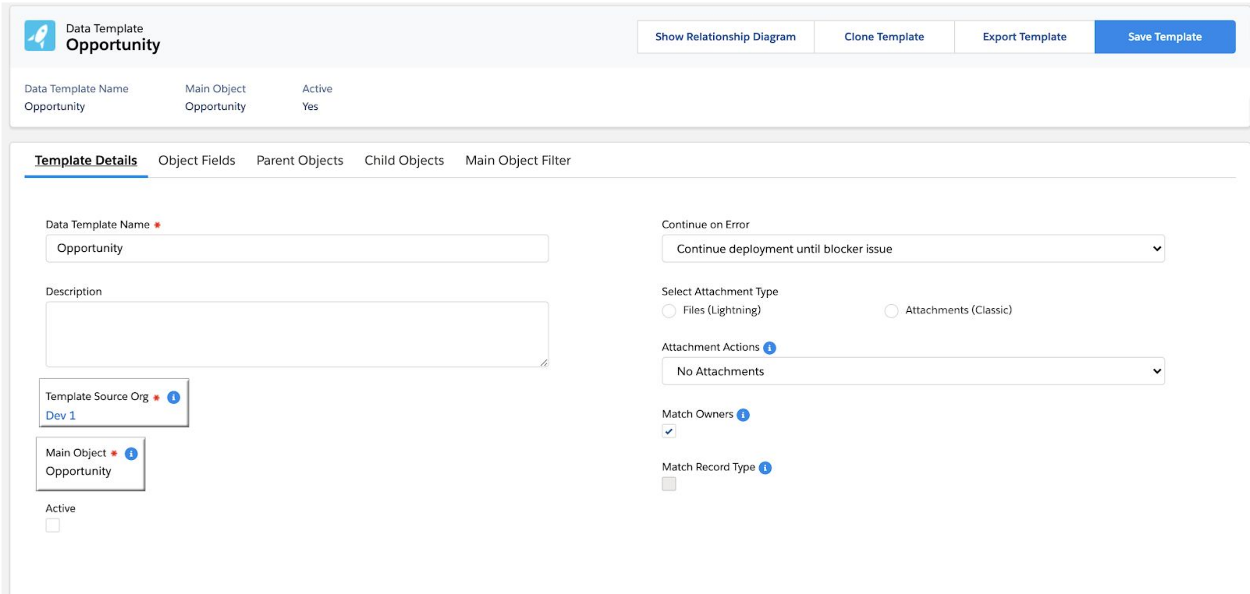
Use Case #2

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:



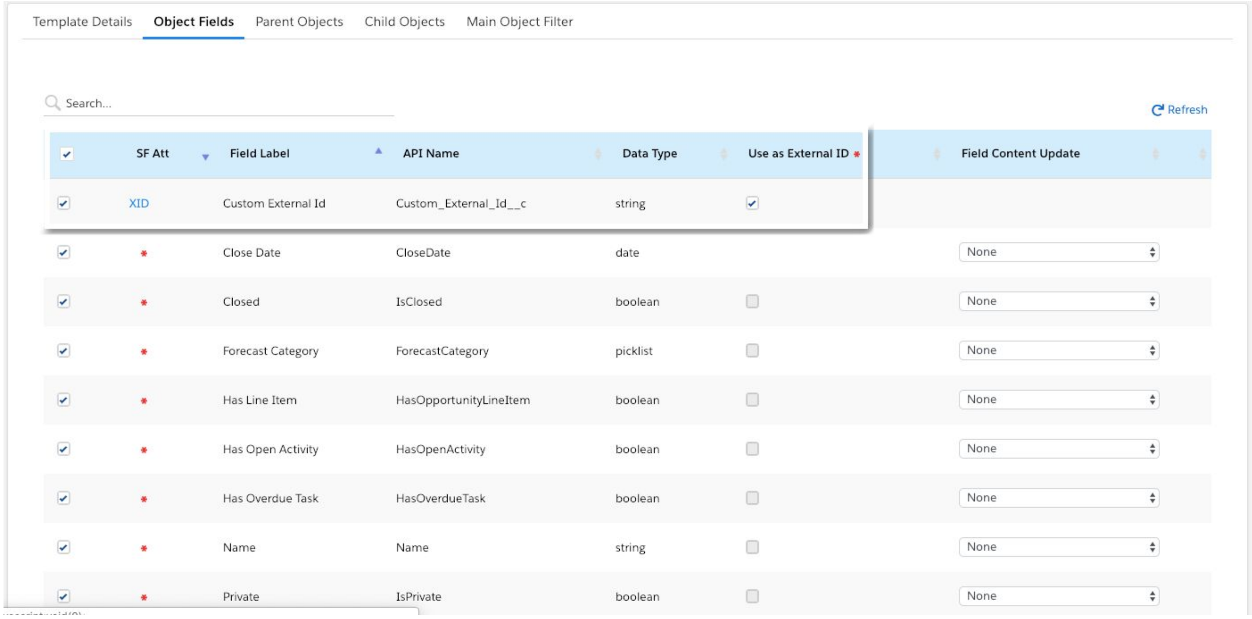
Once we are clear on what we need to move, we can go ahead and build our data template.

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**:

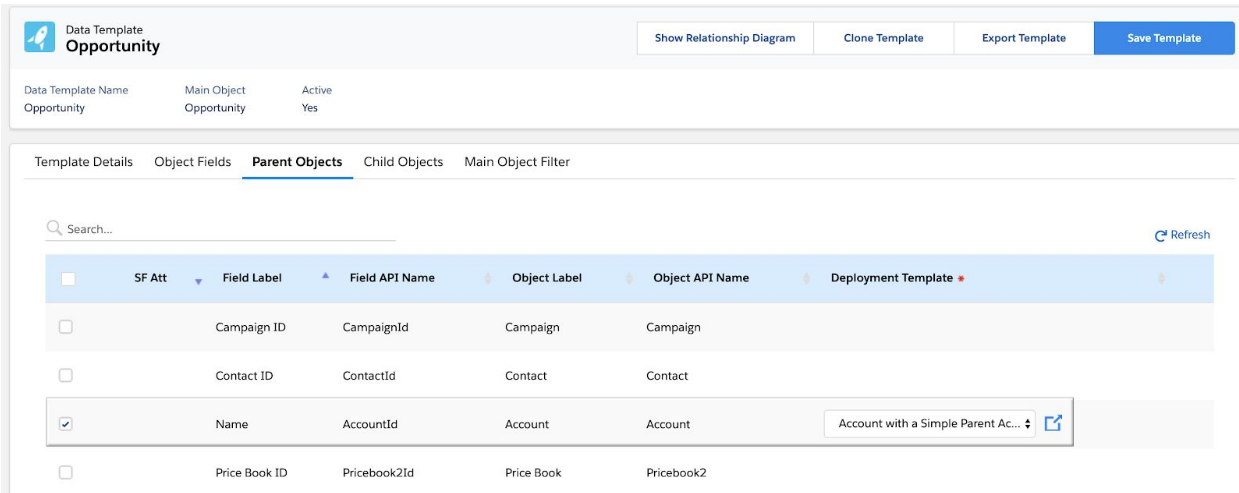


In the **Object Fields** tab, the first field you will find is the external Id field. Make sure this field is checked.

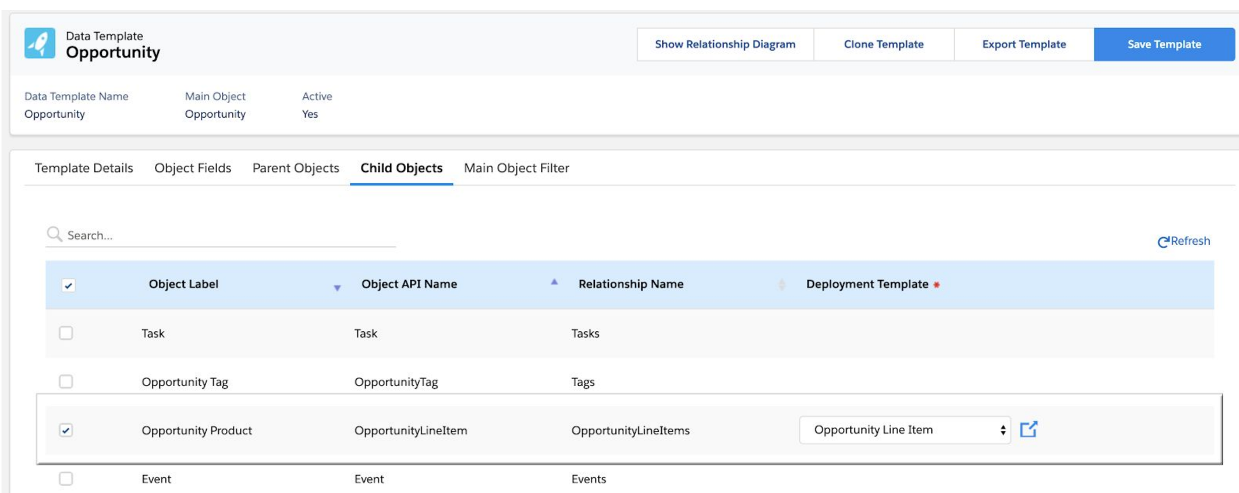
All other fields will be also preselected, but you can uncheck any fields you don't want to deploy:



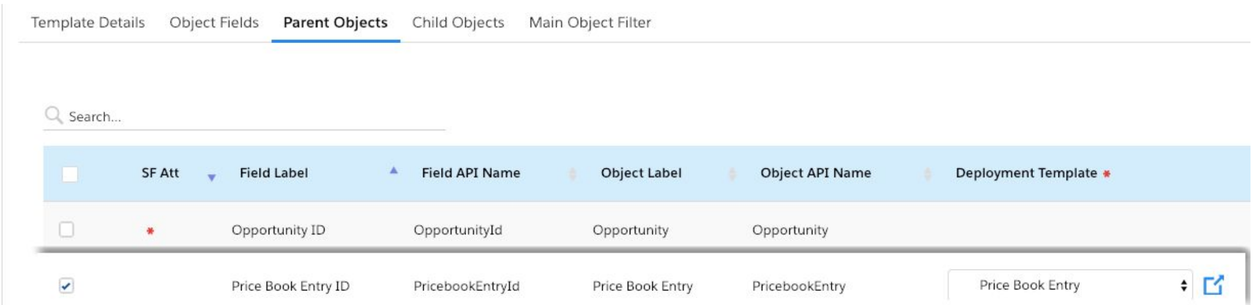
In the **Parent Objects** tab we will select the **Account** with the corresponding account with parent account template that we have already created. If you don't have it yet, follow the steps in Use Case #1 to create it:



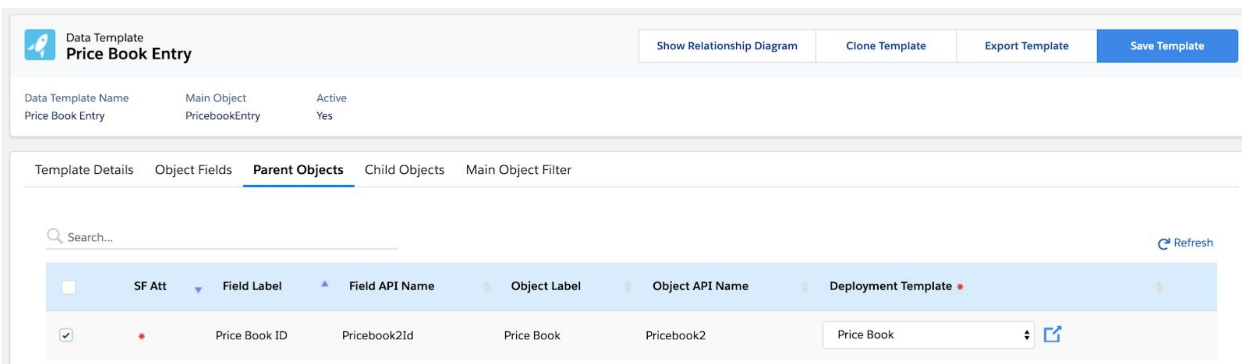
In the **Child Objects** tab, we are going to select the **Opportunity Line Item** and an existing template from the dropdown. If you don't have one yet, you can click on **Create new data template** to quickly create a new one:



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:

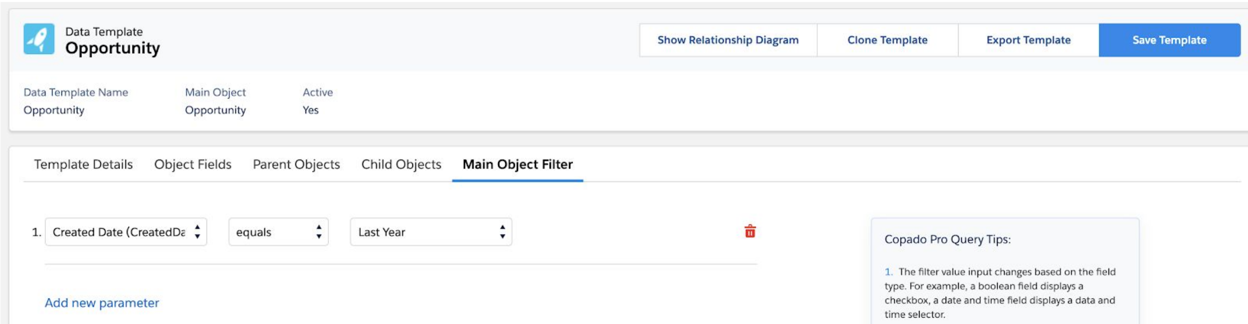


Navigate to the **Price Book Entry** data template and select the **Pricebook ID** in the **Parent Objects** tab and an existing template from the dropdown. If you don't have one yet, you can click on **Create new data template** to quickly create a new one:

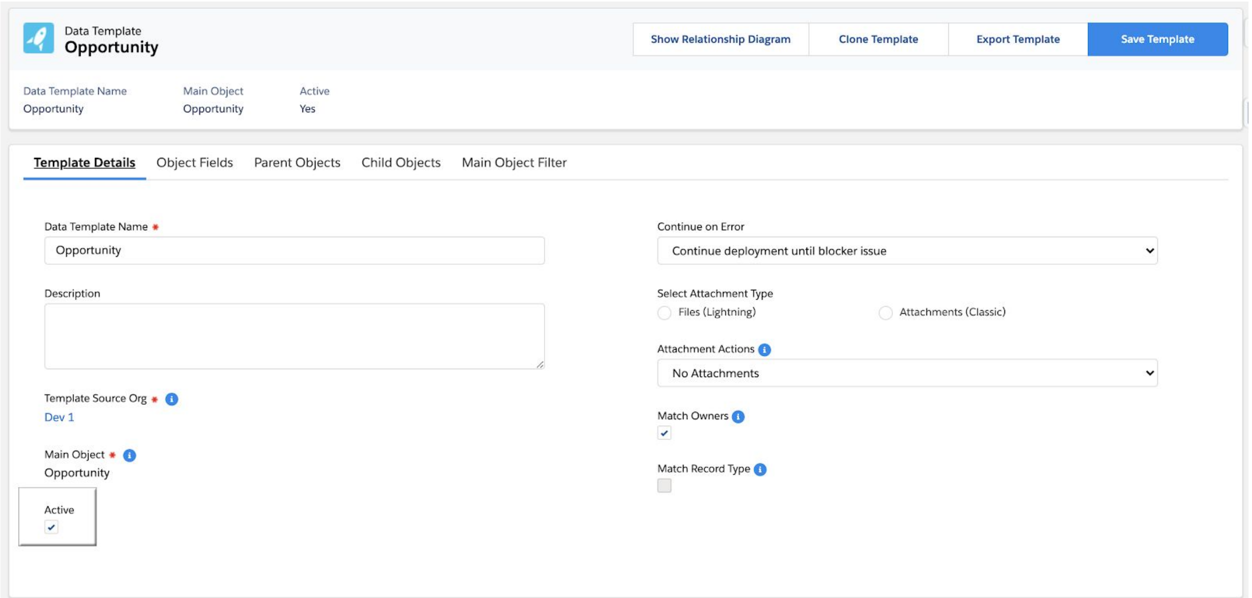


Make sure tall the templates have an External Id field selected.

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**:



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



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.