How to spin up a new demo environment

1. Create a new environment in PPAC and indicate Sales Enterprise, Customer Service, and Field Service apps to be installed
   1. Use the proper environment naming standards
   2. Use the proper naming standards for the custom URL
   3. Assign the OB SE Global security group
2. Turn on Auditing for Accounts, Contacts, Opportunities, Cases, and Appointments
3. ***Create custom field for “Opportunity Number” on the Opportunity Table***
4. Delete native Duplicate Detection Rules for Accounts and Contacts
5. Create Demo Environment DDRs for Accounts, Contacts, Opportunities, and Cases
   1. Account – Base on Account Number
   2. Contact – Base on External User Identifier
   3. Opportunity – Base on Opportunity Number
   4. Case – Base on Case Number
6. Import and Activate Data Maps for Accounts and Contacts, Opportunities, Cases, Appointments, Tasks, and Phone Calls
7. ***Manually create “Standard Price List” record***
8. Import Fortune 1000 Accounts and Contacts
9. Import Opportunities
10. Import Cases
11. Import Appointments
12. Import Tasks
13. Import Phone Calls