

iHASCO CPQ Data Seeding

CPQ data deployer requirements:

1. You require a copado admin licenseto complete this activity
2. You require a copado data deployer license to complete this activity
3. Create a credential for your target org that has atleast the following profile/permissions/licenses/permission set groups:
 - a. CPQ License
 - b. CPQ Admin permission set
 - c. iHASCO permission set group
 - d. User profile should be set to citation data admin

Manual process:

1. Update the org migration id values for the standard and ihasco price books**
2. Deploy the pricebook and PBE data template*
3. Deploy the product CPQ Main data template*
4. Deploy the price rule data template*
5. Deploy the product rule data template*
6. Deploy the iHASCO Pricing matrices data template*
7. You will likely have to load a table of price book entry records in with org migration ids**
8. Review data - for completeness, feel free to redeploy the product cpq main data template, if you had to complete step 7.

*Process to deploy a data template (data deployment)

1. Navigate to 'data templates' object, (if you can't find it see steps 1 &2 of 'CPQ data deployer requirements' above
2. Add Deployment name, click next
3. Select Source credential, click confirm source (to date I've always matched this to the source credential of the data template itself)
4. Select Target credential, click confirm target
5. Select Main data template, Click confirm selection
6. Check your selections
7. Click validate
8. Click Deploy

**Prior to the latest refresh a series of records required as part of this deployment did not have an org migration id, as such the deployments generate a heap of data without these IDs. This causes problems for data deployments. Once either we refresh sandboxes from production again (any time from 19/7/22) or a dev box from integration (once I have a chance to get the data right in that org) the data templates should work just fine. For now, please find the following table of Pricebook entries with required org migration IDs (the following table is accurate to the best of my knowledge as of 19.7.22):

Price book org migration ids:

1. 'Standard Price Book', 'IH-11502'
2. 'iHASCO', 'IH-11501'

Id	Org_Migration_Id__c
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01u4G00001A4VJqQAN	IH-11027
01u4G000018yjgxAQA	IH-11028
01u4G000018yjgyQAA	IH-11029
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01u4G000018yjgZQAQ	IH-11031
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01u4G000018yjhvQAA	IH-11036
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01u4G00001A4W1QQAV	IH-11072
01u4G00001A4W3dQAF	IH-11073
01u4G00001A4W1RQAV	IH-11074
01u4G00001A4W3eQAF	IH-11075

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There is an automated process that I can add at a later date following more fine tuning.