

1. Prepare Data Files

- **Update Owner Fields:**

Ensure the Owner field in the shared data files matches the user's full name, you have created or identified for this import process.

Files requiring updates: Contacts, Account, Opportunity, Goal (parent & child).

Please refer [Users - for reference.csv | GitHub](#) for user and their designation.

- Ensure users with title Sales Representative are assigned the following security roles:

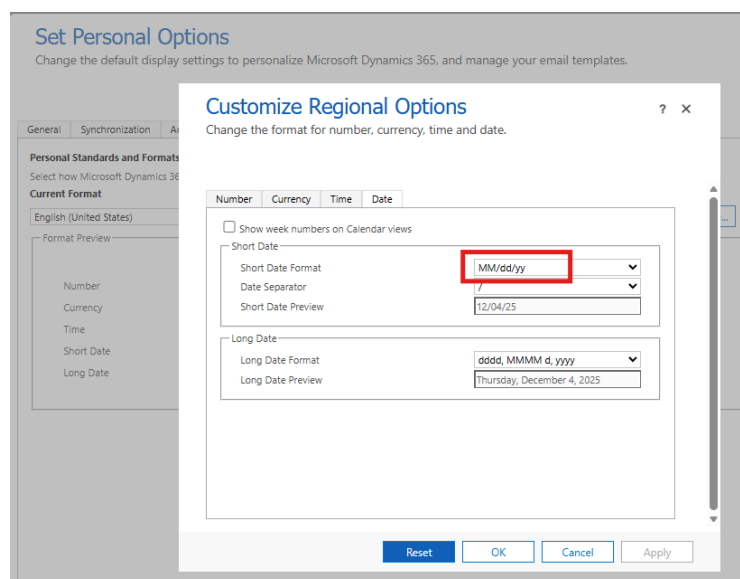
- Basic user
- Sales enterprise app access
- Salesperson
- Sales team member

- Assign the following security roles to sales manager user:

- Approvals User
- Forecast manager
- Sales Manager

- **Opportunity file date format** - In [8_Opportunity.csv] – Validate if the date format is same as your date settings. If not, update the date matching your date format in columns - Created On, Est Close Date, Actual Close Date.

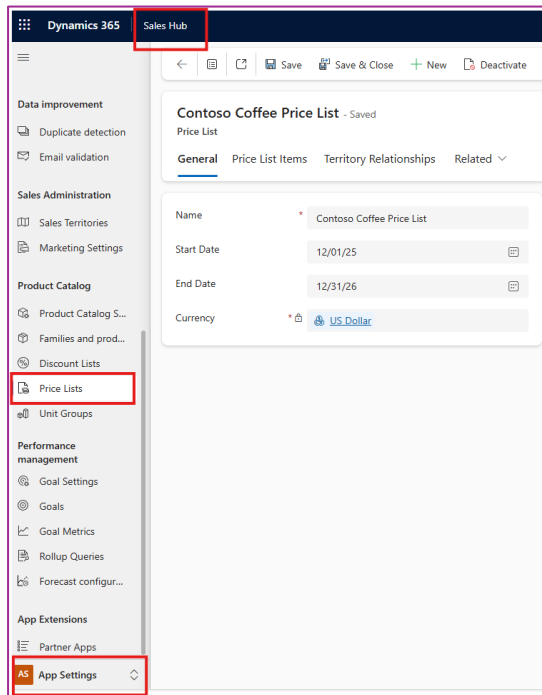
To validate settings you can follow the navigation - Go to **Personalization Settings → Formats → Customize → Date → Short Date Format**



2. Import Data Maps

Import the 3 data maps. Use navigation = Power Platform Environment Settings App → System → Data Management → Data Maps → Import

3. Create a Price List - named **Contoso Coffee Price List** as below



4. Import Files –

- Use below navigation and import the below listed files in sequence

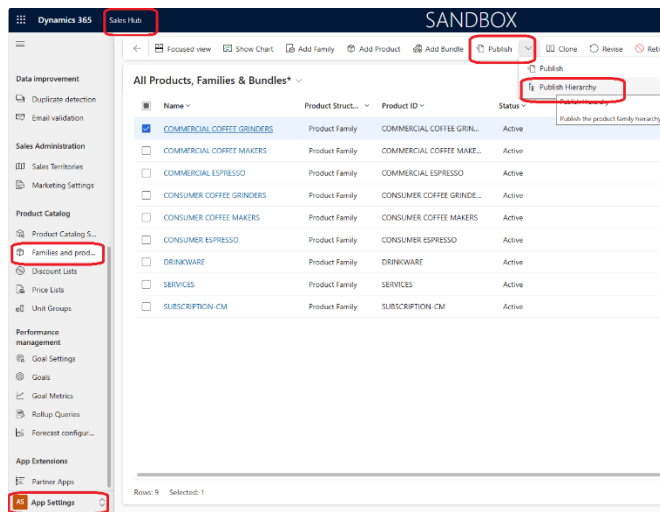
- 1_Territory
- 2_Contact
- 3_Account
- 4_ProductFamily
- 5_Product
- 6_Price List Item

- **Navigation –**

- Power Platform Environment Settings App → System → Data Management → Imports -> New Import -> Choose file -> Next-> Keep Allow Duplicates off -> Click Next
- For entities Price List Item, Opportunity & Goal-child, use the data map imported. For others select default (automatic mapping).

5. Publish Product Families

- Once the Price list items are imported, publish the product families. You can publish one product family at a time. Select the Product family and choose Publish Hierarchy option. Repeat the step for all.



- Import rest of the following files in sequence

- 7_Campaign
- 8_Opportunity
- 9_Goal_parents
- 10_Goal_child