

THE ULTIMATE GUIDE TO SALESFORCE DATA MIGRATION

Streamline Your Data Migration
Process in Salesforce



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Introduction

Data migration is an integral aspect of change management in Salesforce.

Businesses need to move data to upgrade databases, maintain data integrity, test new functionality before deploying to production, merge orgs for better management, and establish new CRMs.

DATA MIGRATION IS ALSO AN IMPORTANT STEP IN THE RELEASE PROCESS FOR APPS THAT UTILIZE CONFIGURATION DATA FOR SETUP.

Unfortunately, many Salesforce professionals find it challenging to migrate data between environments.

In this guide, we'll discuss best practices for data migration so you can build your data migration strategy around them. That way, you can streamline your workflow—and enhance your chances of getting the deployment right the first time.



Part I: Preparation

When it comes to migrating data from org to org, the level of difficulty of the project depends in large part on the volume and types of data that need to be deployed.

REGARDLESS OF THE COMPLEXITY OF YOUR DATA MIGRATION PROJECT, PREPARATION IS KEY.

The tips in this chapter will help you stay organized so you can optimize your Salesforce data deployment process.

Back Up Your Data

ALWAYS MAKE A BACKUP OF THE DATA.

In case something goes dramatically awry, you'll be able to restore the original data immediately and continue business as usual.

In Salesforce, the following methods are available to back up your data:

- **Data Export Service:** Manual or scheduled exports of your data via the UI.
- **Data Loader:** Manual on-demand exports of your data via the API.
- **Report Export:** Manual on-demand exports of your data via reports.

There's also a paid add-on, Backup and Restore. Plus, you can use Prodlly to seed the data to a dedicated backup sandbox. That way, you don't have potentially sensitive data stored locally in CSVs.

In addition, there are several third-party apps available.



Outline Your Data Migration Project

Determine the purpose, scope, and timeline of the migration. Understanding these details will guide your actions throughout the rest of the process.

You should also budget sufficient time to prepare for the data migration to ensure the success of the deployment. Add some extra time in case you run into issues.

Create a Robust Data Governance Plan

DATA GOVERNANCE DEFINES WHO IN A COMPANY IS RESPONSIBLE FOR THE DATA AND HOW IT MAY BE USED.

[Data governance](#) is critical to ensuring the continuous integrity and value of the data. While you need governance processes for all types of data, the most common types of data included are metadata, reference data, and transaction data.

Develop a data governance plan to pinpoint how to manage data before, during, and after the migration. This plan should:

- Assign roles and responsibilities
- Establish how to validate data before storing it
- Outline a policy for the storage of legacy data

Cleanse the Data

Migration is easier if you're working with clean data. Beyond that, ensuring your data is clean has several benefits:

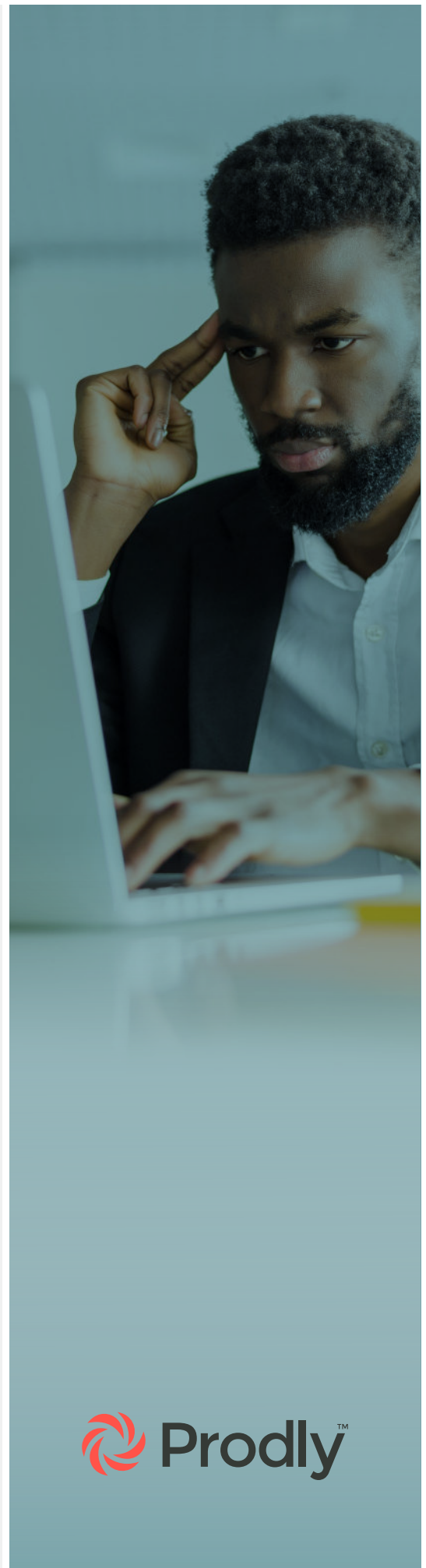
- **It's accurate.** For example, if your data includes two companies—ACME and ACME Inc.—are they both the same company? How many Account records should there be—one or two?



- **It's usable.** For instance, if you don't have duplicate data, it's easier to discern where to add new Contacts or Accounts.
- **It's credible.** Supplying your users with clean data prevents them from looking outside of Salesforce for the information they need.
- **It promotes adoption.** Because clean data makes Salesforce more reliable, users are more likely to adopt the platform.

Implement a data cleansing plan to:

- Delete outdated data
- Resolve duplicate records
- Correct data entry errors, such as spelling and punctuation errors
- Use the right formatting for addresses and phone numbers
- Develop and enforce naming conventions
- Fill in data that's missing from your records
- Verify the data types to ensure they're correct



Part II: Migrate the Metadata

Before you start migrating the data, you need to migrate the metadata.

Sample the Metadata

Investigate the source org to determine the data model structure.

THE DATA MODEL STRUCTURE SHOWS WHAT OBJECTS EXIST IN THE ORG, AS WELL AS HOW THOSE OBJECTS ARE RELATED TO EACH OTHER.

For example, when you sample the metadata, you might find that it contains a custom object called “Deal Request,” which relates to Opportunity.

Similarly, perhaps you’ve installed a managed package from the AppExchange that created several objects in the org. You’ll need to understand what those objects are and how they relate to the other objects in the org before attempting to migrate data into them.

Map the Metadata

Next, map the objects, along with their fields and values, from the source environment to the objects, fields and values in the destination org.

IN YOUR DESTINATION ORG, YOU’LL NEED THE EXACT SAME FIELDS AS IN YOUR SOURCE ENVIRONMENT. THAT WAY, THE DATA WILL HAVE A PLACE TO GO WHEN YOU IMPORT IT.



The difference between the data model structures in the source and destination environments governs how complex the data mapping process is.

If you're missing any fields, create custom fields in your destination org. Make sure the field names match completely. Add values to picklists if necessary to ensure all the values in your source org are represented in your destination org. Or use Prodlly to sync metadata differences between orgs.

You can also create a field in the destination environment to store the source org record ID. This essentially makes the source org record ID a referencible external ID, which is helpful during validation and troubleshooting.

PRODLY APPOPS PROVIDES A MUCH EASIER WAY TO DO THIS. IT MAINTAINS EXTERNAL IDS FOR YOU AUTOMATICALLY. THEN IT SHOWS YOU IN THE DEPLOYMENT RESULTS WHAT THE CORRESPONDING SOURCE RECORD IS.

Double Check the Fields

Make sure to double check the fields in Salesforce. All the data you'll include needs a corresponding field in the destination org. If anything doesn't line up, you'll encounter errors when deploying the metadata.



Part III: Migrating the Data

Once you've successfully moved the metadata, you can migrate the data into the new environment.

Use a Single Source of Truth

TO ENSURE THAT THE DATA YOU NEED TO MIGRATE IS ACCURATE, USE A SINGLE SOURCE OF TRUTH—OR SSOT.

Determine which data is up to date and in use before you prepare to migrate it to the destination environment.

Mask Sensitive Data

Make sure that the appropriate roles, profiles, and sharing rules are in place so users see only the data they should see.

If applicable, mask data to protect personal identifiable information (PII), sales revenue, or other sensitive data.

[Salesforce Data Mask](#) lets you mask the data in an environment when using Sales Cloud, Work.com, Service Cloud, AppExchange applications, Salesforce Industry products, and platform customizations.

Prodly AppOps also offers data obfuscation, letting you use either data masking or data scrambling.

Data obfuscation is critical for security and compliance purposes in many industries.



Create Checklists

If you're using a data migration tool like Data Loader or Dataloader.io, make lists of all the fields you need on your spreadsheets.

Also list any data manipulation that needs to be performed between steps.

For example, add a column for the record owner. If you don't do this, Salesforce will list the person who performs the migration as the record owner. If you're using legacy data migration tools in Salesforce, you'll need to enter the record owners' Salesforce User IDs.

Additionally, add a column for parent records if necessary, for example for Contacts or Opportunities. If you're migrating Opportunities using the data wizard, you'll need to use the Salesforce record ID. Similarly, in Data Loader, all parent records are listed by the Salesforce record IDs.

IT'S HELPFUL TO CREATE A LIST OF HOW TO LOAD THE INDIVIDUAL RECORDS. FOR EXAMPLE, BEGIN WITH THE PARENT OBJECT, THEN THE CHILD OBJECT, ETC.

Using Audit Fields

If you want to know who originally created a record or when, turn on audit fields.

NOTE THAT AUDIT FIELDS CAN ONLY BE SET ON CREATE—NOT ON UPDATE. THAT MEANS IT ONLY WORKS FOR NEWLY IMPORTED RECORDS.

So what do you do if you need audit information on data that already exists in the destination org? You have to export the records to a CSV file and delete them in Salesforce. Then update the information and import the data as newly created records.

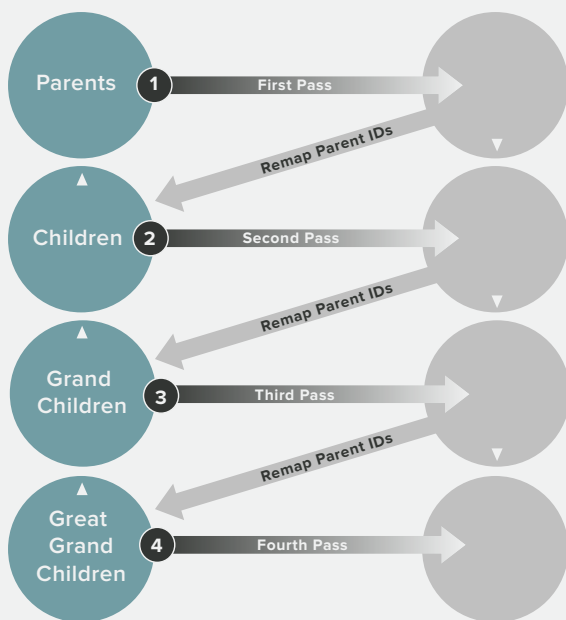


Migrating Relational Data

Relational data is typically challenging to migrate because relationships between records can be extremely complicated. Follow these steps to maintain complex relationships:

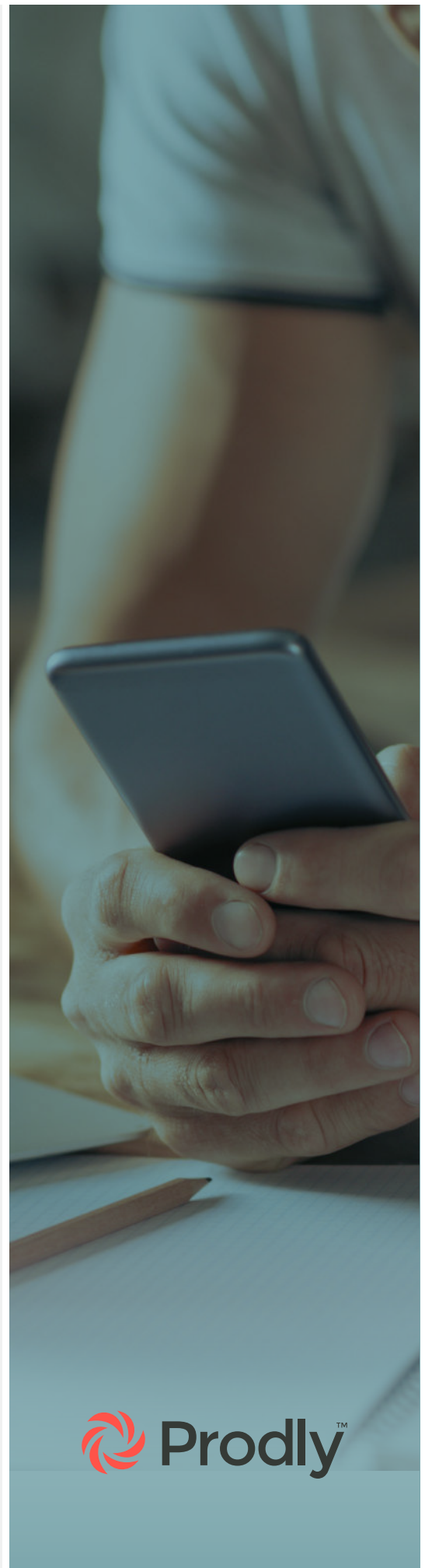
1. Ensure all records in the source system are assigned a unique ID. Then map related records to the relevant user and parent IDs. If you don't specify the user and/or parent record, the import will fail.
2. Load the data in the proper order to maintain data dependencies. Always load the parent record first—for example, load the Account first and then the Contact.
3. Next, download the parent records from the destination org to get their new IDs. Then map the child records to the new parent IDs so they get related when you insert them.

Keep going for as many levels as you have. The image below shows an overview of how this looks.



For example, if you're moving Contacts, make sure they're linked to their Accounts. When you migrate them, you'll now import the entire context into the destination org.

This allows you to look up the matching Accounts for Contacts with the unique ID, since Salesforce record IDs change during data migration.



Turn off Any Automated Workflows

If you have automation (workflows, triggers, flows, validation rules etc.) that fire in the destination org as a result of new or updated records, be sure to turn it off. Otherwise, an action might fire as many times as the number of records you're migrating.

For example, let's say the creation of a new record triggers an email to Sales. You don't want Sales to be inundated with emails that are solely the result of data migration. In this case, you need to turn off the workflow for the duration of the migration.

Begin With a Small Test Batch

INSTEAD OF DEPLOYING THE ENTIRE DATA MIGRATION AT ONCE, START WITH A BATCH OF 20 RECORDS.

This is sufficient for you to see whether you've prepared and mapped all the data appropriately. It will also show you whether the deployment results are as expected.

Validate the Migrated Data

Validate the migrated data by comparing record counts. Spot check the data by creating custom reports. This provides you with a record count. In addition, you can add all the fields you care about in the report to make sure the records are upserted and the field data is correct.

If you missed turning off a validation rule, it will prevent updates to any records that fail the validation. Pay attention to picklists, because you can force data in—even if it's not one of the picklist value options.

To check that relationships were migrated correctly, leverage Cross Filters and review exception reports.



Part IV: Advantages of an Automated Data Migration Tool

The Drawbacks of Legacy Data Migration Tools

Data Loader, Salesforce's free tool, and dataloader.io both involve a significant amount of manual labor.

In addition, they're time consuming, error prone, and far from secure. Why? Because the data has to be exported from the source org to CSVs on your computer before you can import it into the destination org.

Benefits of Prodlly AppOps

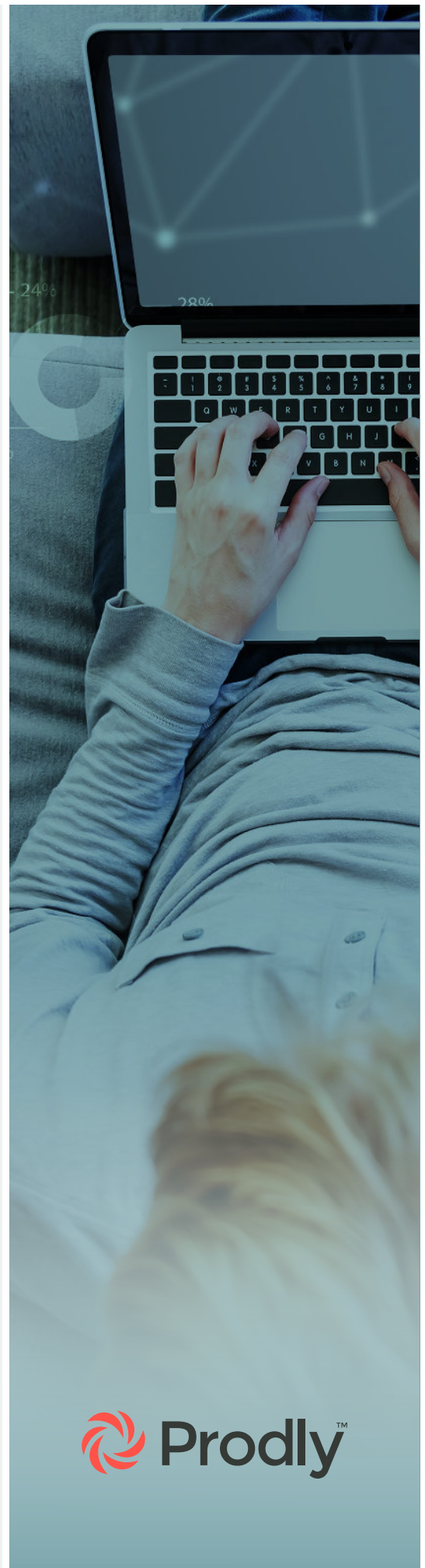
In contrast, Prodlly AppOps is a user-friendly, "clicks, not code" data migration tool that leverages automation to do the heavy lifting for you.

PRODLY APPOPS LETS YOU MIGRATE AS MANY RECORDS AS YOU WANT—including complex relational data loads—up to five orgs at once. This eliminates many of the manual steps needed with Data Loader and DataLoader.io.

You can review the results of the deployment with a single click. The data migration software automatically tracks every change you make, allowing you to effortlessly ensure compliance. And since the solution doesn't require you to download any data to your desktop, it's just as secure as your Salesforce environment.

With Prodlly AppOps Release for Data, you can reduce the time you spend on data migration by 85 percent and reduce system downtime by 66%.

This in turn greatly improves your agility and velocity—so you can capitalize on new opportunities and advance your business faster than ever before.



Conclusion

Data migration in Salesforce can seem daunting—especially when you're dealing with hundreds or thousands—or even millions—of records. Fortunately, the complexity of data migration can be reduced by implementing a well-thought-out data governance plan.

In addition, instead of using a legacy tool like Data Loader, leverage an automated data migration tool like Prodlly AppOps Release for Data.

WITH PRODLY APPOPS, YOU CAN OPTIMIZE
YOUR DATA DEPLOYMENTS—AND IMPROVE
PRODUCTIVITY BY 80 PERCENT.

For more information about Prodlly AppOps Release for Data, request a demo at www.prodlly.co.

