Moover Salesforce CPQ Reference Data Deployment Guide

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CHAPTER 1. Salesforce CPQ Data Deployment

Overview

Prodly provides specially-designed, pre-built Moover templates to assist with Salesforce CPQ reference data deployment. The templates give you a great start towards deploying your configure-price-quote (CPQ) reference data for Salesforce CPQ. Templates are available for pertinent versions of Salesforce CPQ. Prodly delivers each version of the templates in a .zip file available on the Prodly website and from Github.

Each .zip file contains the collection of JSON-formatted template files necessary for a complete Salesforce CPQ reference data deployment. Each .json template file contains deployment instructions, stored as data sets and deployment plans, specific to a logical subset of related objects in the CPQ schema. Importing these pre-built data sets and deployment plans from the template files creates a series of data set and deployment plan records in Prodly Moover. Importing does not alter the Prodly Moover app in any way.

The pre-built data sets speed up your configuration effort for deployment of the reference data in a typical Salesforce CPQ implementation. Because every Salesforce CPQ implementation is unique, you might need to modify these data sets to accurately reflect your implementation. While Prodly created these data sets and this document for use with Salesforce CPQ, you are welcome to use them as a conceptual reference for any CPQ implementation. This document describes how to import and customize the data sets to meet your specific needs.

Prodly has created and tested these templates with Moover using Salesforce CPQ with the Salesforce CPQ High Tech Demo data. The following versions of the templates are available for composite external ID (CEID) and virtual external ID (VEID):
- CEID for Salesforce CPQ Winter '19 version 216
- VEID for Salesforce CPQ Winter '19 version 216
- CEID for Salesforce CPQ Summer '18 version 214
- VEID for Salesforce CPQ Summer '18 version 214
- CEID for Salesforce CPQ Spring '18 version 212
- VEID for Salesforce CPQ Spring '18 version 212
- CEID for Salesforce CPQ Winter '18 version 210
- VEID for Salesforce CPQ Winter '18 version 210
- CEID for Salesforce CPQ Summer '17 version 208
- VEID for Salesforce CPQ Summer '17 version 208

Prodly intends to create templates for future versions of Salesforce CPQ as new versions become available.

Deployment Considerations

Because of the interrelational nature of CPQ data, there are many factors to consider and, in certain cases, you need to deploy data sets in a specific order. For example, temporarily disabling Salesforce features such as triggers might be necessary to avoid problems during deployment. Carefully analyze your data to determine the best approach and sequence of deployment events.

The following list contains factors to consider before deploying your data:
- Triggers
- Validation rules
- Multi-currency
- Salesforce version
- Salesforce CPQ managed package version
- Prodly Moover managed package version
- Moover Salesforce CPQ template version
- Duplicate records in your data

Deployment Sequence Checklist

The order in which you prepare your environment and deploy the data sets impacts the success of your deployment. For example, you need to deploy the SBQQ Price Book Data Set before deploying the SBQQ Product Data Set because the Price Book Entry object needs to be populated before bringing over all the product options.

The exact sequence of events depends on your specific data. The following sequence works well to deploy the data from the Salesforce CPQ High Tech Demo organization using the Moover Fall '18 managed package version 1.149 or later, Salesforce Summer '18, and Salesforce CPQ Summer '18 managed package version 214.

Pre-Deployment

- ❏ 1. In Salesforce, ensure you have the same major version of the Salesforce CPQ managed package installed in your source and destination organizations.
- ❏ 2. In Salesforce, ensure that the schemas for all objects in the deployment exactly match in the source and destination organizations.
- ❏ 3. In Salesforce, ensure that the Salesforce CPQ global picklist exactly matches in the source and destination organizations.

- ❏ 4. In Salesforce, to the best of your ability, clean the data in your source and destination organizations to eliminate duplicate records.
- ❏ 5. In Salesforce, when using a production organization for your source or destination, ensure you have a user with a CPQ license in your production organizations. You use this user account as the connection user in Moover when you create the connections for the CPQ deployment.
- ❏ 6. In Salesforce, whether production or sandbox, assign the Salesforce CPQ Admin permission set to the connection user.
- ❏ 7. In Salesforce, if using multi-currency in your source organization, ensure multi-currency is turned on in your destination organization, and the currency ISO codes match in your source and destination organizations. Refer to the Salesforce Enable Multiple Currencies help page for details.
- ❏ 8. In your Salesforce destination organization, disable CPQ triggers by navigating to **Setup > Installed Packages > Salesforce CPQ > Configure > Additional Settings**, selecting **Triggers Disabled**, and clicking **Save**.

  > *Note: If for some reason you proceed without disabling triggers, be prepared to encounter and resolve various deployment errors. For example, to resolve errors with custom conditions, use the **Deploy Last** field property to deploy conditional entries before deploying the condition which references them.*
- ❏ 9. In your Salesforce destination organization, ensure the **Standard Price Book** is active.
- ❏ 10. Determine the approach to avoiding creation of duplicate records appropriate for your use case. Prodly recommends using VEID unless there is existing data in your destination organization that was entered by a method other than a sandbox refresh or sandbox cloning (such as a data loader or manual entry), in which case you must use CEID, formal Salesforce external IDs (FEID), or first consolidate the data. Refer to the chapter on data set customization for more information.
- ❏ 11. In Moover on the **Connections** tab, ensure you have created connections using your connection user to your schema, source, and destination organizations.

  > *Note: Prodly recommends that admins with a full system administrator profile create your connections to avoid permission and access issues. For connections to data destination organizations, the user you use to create the connections needs to have write access for all of the objects in the data set. For connections to data source organizations, the user needs to have write access for all of the objects in the data set.*
- ❏ 12. In Moover, import the desired data sets from the Moover Salesforce CPQ template version that matches your version of Salesforce CPQ and the upsert method you determined in the previous step.
- ❏ 13. In Moover, when using CEID templates, ensure that the default composite external IDs are truly unique for your specific data.

Deployment

- ❏ 14. In Moover, deploy the SBQQ Price Book Data Set first, before deploying any other data sets.
- ❏ 15. In Moover, deploy the SBQQ Product Data Set next, before deploying any other data sets.

❏ 16. In Moover, deploy the remaining data sets in any order. If using a deployment plan, deploy the price rule, product rule, localization, and quote template data sets sequentially (one data set per deployment plan item) and the remaining data sets concurrently (together in one deployment plan item).

❏ 17. In Moover, validate your deployment results.

Note: If you see errors using CEID, check the uniqueness of your composite external IDs.

Post-Deployment

❏ 18. In Salesforce, enable CPQ triggers in your destination organization by navigating to **Setup > Installed Packages > Salesforce CPQ > Configure > Additional Settings**, deselecting **Triggers Disabled**, and clicking **Save**.

❏ 19. On the same **Additional Settings** tab, under **Post Install Steps**, click **Execute Scripts**.

❏ 20. Enjoy all the free time Moover gives you!

Salesforce CPQ Objects and Data Types

Salesforce CPQ consists of objects containing reference data (for example, products, and price books), objects containing transaction data (for example, opportunities and orders), and internal use objects. Transaction and internal use objects are not part of a typical CPQ data deployment, and thus not part of the Moover Salesforce CPQ templates. The following table lists the CPQ objects along with their object types, data types, and the Salesforce CPQ managed package versions in which they appear. The CPQ templates consider only objects with checkmarks in the reference data column.

Object	Object Provider	Reference Data	Transaction Data	Internal Use Only	216 W'19 214 S'18 212 S'18 210 W'18	208 S'17	27 W'17
Account	Salesforce		✔		✔	✔	✔
Additional Document	Salesforce CPQ	✔	✔		✔	✔	✔
Asset	Salesforce		✔		✔	✔	✔
Attribute Item	Salesforce CPQ	✔			✔		
Attribute Set	Salesforce CPQ	✔			✔		
Attribute Value	Salesforce CPQ		✔		✔	✔	✔

Block Price	Salesforce CPQ	✔			✔	✔	✔
Configuration Attribute	Salesforce CPQ	✔			✔	✔	✔
Configuration Rule	Salesforce CPQ	✔			✔	✔	✔
Contract	Salesforce		✔		✔	✔	✔
Contracted Price	Salesforce CPQ		✔		✔	✔	✔
Cost	Salesforce CPQ	✔			✔	✔	✔
Custom Action	Salesforce CPQ	✔			✔	✔	✔
Custom Action Condition	Salesforce CPQ	✔			✔	✔	✔
Custom Script	Salesforce CPQ	✔			✔	✔	✔
Discount Category	Salesforce CPQ	✔			✔	✔	✔
Discount Schedule	Salesforce CPQ	✔	✔		✔	✔	✔
Discount Tier	Salesforce CPQ	✔	✔		✔	✔	✔
Error Condition	Salesforce CPQ	✔			✔	✔	✔
Favorite	Salesforce CPQ		✔		✔	✔	✔
Favorite Product	Salesforce CPQ		✔		✔	✔	✔
Favorite Share	Salesforce CPQ		✔		✔	✔	✔

Import Column	Salesforce CPQ	✔			✔	✔	✔
Import Format	Salesforce CPQ	✔			✔	✔	✔
Install Processor Log	Salesforce CPQ			✔	✔	✔	✔
Line Column	Salesforce CPQ	✔			✔	✔	✔
Localization	Salesforce CPQ	✔			✔	✔	✔
Lookup Data	Salesforce CPQ	✔			✔	✔	✔
Lookup Query	Salesforce CPQ	✔			✔	✔	✔
Opportunity	Salesforce		✔		✔	✔	✔
Opportunity Product	Salesforce		✔		✔	✔	✔
Option Constraint	Salesforce CPQ	✔			✔	✔	✔
Order	Salesforce		✔		✔	✔	✔
Order Product	Salesforce		✔		✔	✔	✔
Price Action	Salesforce CPQ	✔			✔	✔	✔
Price Book	Salesforce	✔			✔	✔	✔
Price Book Entry	Salesforce	✔			✔	✔	✔
Price Condition	Salesforce CPQ	✔			✔	✔	✔
Price Dimension	Salesforce CPQ	✔			✔	✔	✔

Price Rule	Salesforce CPQ	✔			✔	✔	✔
Price Schedule	Salesforce CPQ		✔		✔	✔	✔
Price Tier	Salesforce CPQ		✔		✔	✔	✔
Process Input	Salesforce CPQ	✔			✔	✔	✔
Process Input Condition	Salesforce CPQ	✔			✔	✔	✔
Process Input Values	Salesforce CPQ		✔		✔	✔	✔
Product	Salesforce	✔			✔	✔	✔
Product Action	Salesforce CPQ	✔			✔	✔	✔
Product Attribute	Salesforce CPQ	✔				✔	
Product Attribute Set	Salesforce CPQ	✔			✔		
Product Feature	Salesforce CPQ	✔			✔	✔	✔
Product Option	Salesforce CPQ	✔			✔	✔	✔
Product Rule	Salesforce CPQ	✔			✔	✔	✔
Quote	Salesforce CPQ		✔		✔	✔	✔
Quote Document	Salesforce CPQ		✔		✔	✔	✔
Quote Line	Salesforce CPQ		✔		✔	✔	✔

Quote Line Group	Salesforce CPQ		✔		✔	✔	✔
Quote Process	Salesforce CPQ	✔			✔	✔	✔
Quote Template	Salesforce CPQ	✔			✔	✔	✔
Quote Term	Salesforce CPQ	✔			✔	✔	✔
Record Job	Salesforce CPQ			✔	✔	✔	✔
Search Filter	Salesforce CPQ	✔			✔	✔	✔
Search Index	Salesforce CPQ	✔			✔	✔	✔
Solution Group	Salesforce CPQ	✔			✔	✔	✔
Subscribed Asset	Salesforce CPQ		✔		✔	✔	✔
Subscription	Salesforce CPQ		✔		✔	✔	✔
Summary Variable	Salesforce CPQ	✔			✔	✔	✔
Template Content	Salesforce CPQ	✔			✔	✔	✔
Template Section	Salesforce CPQ	✔			✔	✔	✔
Term Condition	Salesforce CPQ	✔			✔	✔	✔
Theme	Salesforce CPQ	✔			✔	✔	✔
Timing Log	Salesforce			✔	✔	✔	✔

	CPQ						
Upgrade Source	Salesforce CPQ	✔			✔	✔	✔
Web Quote	Salesforce CPQ		✔		✔	✔	✔
Web Quote Line	Salesforce CPQ		✔		✔	✔	✔

Template Access

Each version of the Moover Salesforce CPQ templates resides in a .zip file on the Prodly website at https://www.prodly.co/resources and in GitHub at https://github.com/prodly/salesforce-cpq-templates.

To access the Moover templates from the Prodly website, perform the following steps:
1. In a web browser, navigate to the resources page of the Prodly website.
2. In the **Moover Templates** section, click the link for the template version you desire and download the .zip file to your computer.
3. Extract the Moover template JSON files into a directory of your choosing.
4. In the Moover app, click the **Moover Admin** tab. The **Moover Admin** page appears.
5. Click **Import**. A standard file browse dialog box appears.
6. If you are importing from a template containing a deployment plan, perform the following step:
   a. Navigate to the extracted JSON files and select a file to upload. Moover imports the deployment plan and all its data sets from the template file and displays a message indicating successful import of the deployment plan.
7. If you are importing from a template that does not contain a deployment plan, perform the following steps:
   a. Navigate to the extracted JSON files and select a file to upload. Moover imports the data set from the template file, opens the data set editor in a new browser tab, and displays the data set element for the root deployment object in the data set.
      > Note: *A warning message appears if deployment objects in the imported data set do not exist in the data model of your control organization. Refer to Schema Organization Selection for details.*
   b. Close the new browser tab. The previous browser tab appears, displaying a message indicating successful import of the data set.
      > Note: *If you have a popup blocker enabled, Moover likely never opened a new browser tab. Simply refresh your browser window to continue.*
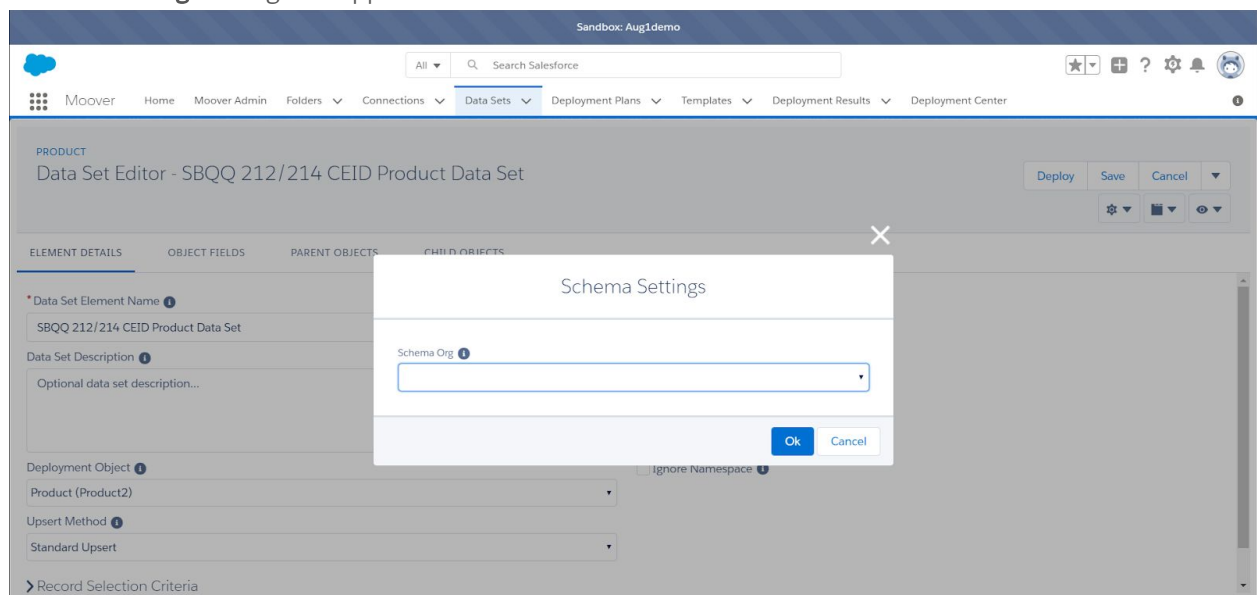   c. Repeat the upload steps for each JSON file you need.

Schema Organization Selection

A data set uses a subset of the data model (schema) of a Salesforce organization. Each data set contains a field identifying the Salesforce organization that contains the schema for the data set. For obvious security reasons, Moover template files do not include the schema field values.

During import, Moover defaults to using your control organization as the schema organization for the data set. Depending on your use case, the schema in your Moover control organization might not contain all the objects necessary for CPQ data deployment. Moover allows you to use any Salesforce organization you have access to as your schema organization on a per-data-set basis.

If you are using an organization other than your control organization as your CPQ schema organization, perform the following steps to assign a CPQ schema organization to each data set you just imported:

1. In Moover, click the **Data Sets** tab. The data sets list page appears, displaying the **Recently Viewed** list view.
2. Click the down arrow to the right of **Recently Viewed** and select **Data Sets (Root Elements)**. All your data sets, including the ones you just imported, appear in the list.
   > *Note: Prodly recommends creating a **CPQ Data Sets** list view identical to the **Data Sets (Root Elements)** list view plus a **Data Set Element Name starts with SBQQ** filter for easier access to the CPQ template data sets.*
3. Click the link to a data set in the **Data Set Element Name** column. The data set editor appears.
4. Click the **Data Set Controls** dropdown list (gear icon, upper right) and select **Schema Settings**. The **Schema Settings** dialog box appears.

5. In the **Schema Org** list, select one of the existing connections to tell the data set editor which organization contains the CPQ schema.
6. Click **OK**. The dialog box closes.
7. Click **Save**.

Alternatively, to bulk edit the schema organizations for all your data sets from a list view, perform the following steps:

1. In Moover, click the **Data Sets** tab. The data sets list page appears, displaying the **Recently Viewed** list view.
2. Click the down arrow to the right of **Recently Viewed** and select **Data Sets (Root Elements)**. All your data sets, including the ones you just imported, appear in the list.
3. Perform the following steps to add the **Use Local Schema** column to the **Data Sets (Root Elements)** list view:
    a. At the right of the screen, click the **List View Controls** icon and select **Select Fields to Display**. The **Select Fields to Display** dialog box appears.
    b. Move **Use Local Schema** from the **Available Fields** list to the **Visible Fields** list.
    c. Click the up and down arrows to position **Use Local Schema** immediately after **Schema Org** in the list.
    d. Click **Save**.

4. For each data set you just imported, deselect **Use Local Schema**.
5. For each data set you just imported, enter the **Schema Org** you desire to use.
6. Click **Save**.

CHAPTER 2. Data Set Customization

Because every implementation is unique, you need to modify the data sets to accurately reflect your implementation. This topic provides guidelines for successful use of the Moover templates.

Duplicate Record Considerations

Your first and most important decision is to determine the approach to avoiding creation of duplicate records that is most appropriate for your use case. The following approaches are available:

- Prodly's virtual external ID (VEID)
- Prodly's composite external ID (CEID)
- Salesforce's formal external ID (FEID)

Moover allows you to specify the approach for each data set element independently. Refer to the expanded upsert capabilities topic in the Prodly Moover for Salesforce User Guide for more information.

Prodly highly recommends using VEID unless you start using Moover in the middle of a development cycle and there is existing data in your destination organization that was entered by a method other than a sandbox refresh or sandbox cloning (such as a data loader or manual entry). When starting mid-cycle, consult with Prodly to determine whether using CEID, using FEID, or first consolidating your data and using VEID is best for your use case.

About VEID

When using VEID, the Moover VEID manager tracks and manages the IDs for you. Moover VEID provides upsert capability without having to know or define any formal Salesforce external ID fields. FEIDs can exist; Moover simply does not use them. New users have a much quicker time to deployment, less ramp up effort, less frustration, and reduced learning curve. Experienced users can simplify their data set model and streamline their deployment performance. Refer to the expanded upsert capabilities topic in the Prodly Moover for Salesforce User Guide for more information.

To use VEID, you must first initialize the VEID manager database. If there is existing data in your source or destination organization that was entered by a method other than a sandbox refresh or sandbox cloning (such as a data loader or manual entry), you must first consolidate the data. Refer to the VEID manager appendix in the Prodly Moover for Salesforce User Guide for more information and data consolidation instructions.

About CEID

When using CEID, understanding and carefully choosing the unique identifier for every deployment object in each data set is essential for successful data deployment. Moover allows you to combine fields to create unique CEIDs. These Moover templates make some assumptions about the optimal CEID for each data set element deployment object. Carefully review the CEID of each deployment object to ensure each works for your use case.

For example, when a name field is part of a CEID, implementing the templates assumes that the names will not change over time. If a name changes in your source organization, the upsert operation will perform an insert instead of an update, which might lead to unnecessary records and incorrect deployment in the destination organization.

For some objects, the record name is normally an autonumber field. Because there is no way to guarantee that a destination organization will have the same autonumbering as the source organization, Moover does not allow autonumber fields to be part of a CEID. Thus, some objects require using almost every field in the object to create a unique CEID.

Using long text area fields, rich text fields, and formula expression fields as part of a CEID might result in errors during deployment. For example, the `Price Condition` and `Price Action` objects contain formula expression fields. Moover prohibits you from using fields with these field types in your CEIDs.

In some cases, you might need to create a Salesforce external ID field to represent a unique identifier, depending on the specific data in your source and destination organizations.

About FEID

Moover treats FEIDs the same as CEIDs. The only differences are Salesforce guarantees FEIDs to be unique (pro) but you must take extra steps outside of Moover to create FEIDs (con). Prodly designed Moover to minimize the need for FEIDs, but in cases where both complicated unconsolidated data makes using VEID difficult and there is not enough uniqueness in your data for CEID, using FEID might be the only viable option for a specific data set element in your use case.

Data Set Details

This topic describes the default values for the data set elements and CEIDs for each deployment object in the Moover Salesforce CPQ template data sets, and also offers recommendations for which CEIDs to carefully verify as unique identifiers for your data. Use the tables in this topic in conjunction with the data set editor in Moover to analyze the CEID for each deployment object.

The following screenshot shows the default values for the root element in a data set.

Default Data Set Element Values

The following table shows default values for the data set element attributes. For descriptions of each data set element attribute, refer to the Prodly Moover for Salesforce User Guide.

Data Set Element Attribute	Default Value	Comments
Active	Set	Always select this checkbox. Moover only deploys data residing in active deployment objects.
Replicate Owner	Unset	The default value is unset because the data is reference data, not transaction data.
Replicate Record Type	Unset	Salesforce CPQ does not use record types by default.
Create Missing Fields	Set	The default value is set because Salesforce CPQ implementations often involve custom fields.
Sync Picklist Field Values	Set	The default value is set to keep the picklists synchronized.
Set Audit Fields	Unset	Because the Moover Salesforce CPQ template data sets deploy reference data, not transaction data, this field is unset by default.
Ignore Namespace	Unset	The default value is unset so Moover considers the namespace.

Ignore Relationship Constraint	Unset	The default value is unset so Moover deploys only the related records.
Deployment Object	Varies	Refer to the next table for a list of deployment objects in the data sets.
Upsert Method	Varies	In the VEID templates, the data set elements use **Virtual External ID**. In the CEID templates, the data set elements use **Standard Upsert** to prevent creating duplicate records in your destination organization and to help identify errors in your data.
Query Filter	None*	Add query filters to deploy subsets of your data. Query filters are particularly useful when encountering the 100,000 records per data set element governor limit. *Objects in the following data set elements contain both reference and transaction data. To deploy only the reference data, the data set elements include the following query filters: ● Block Price specifies `SBQQ__OrderProduct__c == NULL AND SBQQ__QuoteLine__c == NULL` ● Discount Schedule specifies `SBQQ__UserDefined__c = false`

Object-Specific Settings and Composite External IDs

The following table contains the following information for each deployment object:
- **Deployment Object** – Lists the names of all the deployment objects referenced in the Moover Salesforce CPQ template data sets.
- **R**oot element – A checkmark in this column indicates the object is the deployment object in a root element of exactly one data set.
- **N**on-root element – A checkmark in this column indicates the object is the deployment object in a non-root element of at least one data set.
- **Composite External ID Fields** – Lists the fields that comprise the default CEID.
- **V**erify composite ID – A checkmark in this column indicates that Prodly strongly recommends very carefully double checking to verify that the corresponding CEID produces unique data matches for your data. These IDs in particular are known to result in duplicate data for some users. You might need to adjust these CEIDs for your use case.

- **$** – A checkmark in this column indicates the deployment object is multi-currency aware. The data sets include the `CurrencyIsoCode` field in the CEID on multi-currency-aware objects. For multi-currency organizations, always include the `CurrencyIsoCode` field in your CEIDs. For single-currency organizations, Moover ignores the `CurrencyIsoCode` field.

Deployment Object	R	N	Composite External ID Fields	V	$

Additional Document*		✔	`SBQQ__Product__c`
			`SBQQ__QuoteTemplate__c`
			`SBQQ__TemplateSection__c`
			`SBQQ__DisplayOrder__c`
				✔	

*Only `SBQQ__DisplayOrder__c` plus one other field (depending on the parent object) comprise the CEID.					

Attribute Item (was renamed in Winter '18 – refer to Product Attribute below)		✔	`SBQQ__AttributeSet__c`
			`SBQQ__Attribute__c`
			`SBQQ__Sequence__c`		

Attribute Set		✔	`Name`		

Block Price		✔	`Name`
			`SBQQ__Product__c`
			`SBQQ__LowerBound__c`
			`SBQQ__UpperBound__c`
			`SBQQ__PriceBook2__c`
			`CurrencyIsoCode`
					✔

Configuration Attribute		✔	`Name`
			`SBQQ__Feature__c`
			`SBQQ__Product__c`		

Configuration Rule		✔	`SBQQ__Active__c`
			`SBQQ__Product__c`
			`SBQQ__ProductFeature__c`
			`SBQQ__ProductRule__c`
			`SBQQ__RuleEvaluationEvent__c`
			`SBQQ__RuleType__c`		

Cost*		✔	`SBQQ__Active__c`
			`SBQQ__Product__c`
			`CurrencyIsoCode`
					✔

* Prodly recommends using a single `Cost` record per product in each currency, with the possibility of inactive duplicates.					

Custom Action*	✔		`Name`
			`SBQQ__Display_Order__c`
			`SBQQ__Label__c`
			`SBQQ__Location__c`
				✔	

* `SBQQ__DisplayOrder__c` is often different in the source and destination organizations.					
Custom Action Condition		✔	`Name`	✔	
Custom Script	✔		`Name`	✔	
Discount Category	✔	✔	`Name` `CurrencyIsoCode`	✔	✔

Discount Schedule		✔	`Name`
			`SBQQ__Type__c`
			`SBQQ__Product__c`
			`SBQQ__Pricebook__c`
				✔	

Discount Tier		✔	`Name`
			`SBQQ__Number__c`
			`SBQQ__Schedule__c`
			`CurrencyIsoCode`
					✔

Error Condition		✔	`SBQQ__FilterType__c`
			`SBQQ__FilterValue__c`
			`SBQQ__FilterVariable__c`
			`SBQQ__Operator__c`
			`SBQQ__Rule__c`
			`SBQQ__TestedField__c`
			`SBQQ__TestedObject__c`
			`SBQQ__TestedVariable__c`		

Import Column		✔	`Name`
			`SBQQ__ImportFormat__c`
			`SBQQ__Key__c`
			`SBQQ__FieldName__c`
			`SBQQ__ColumnIndex__c`		

Import Format	✔		`SBQQ__Active__c`
			`SBQQ__ImportFormatName__c`
			`SBQQ__TargetObject__c`
				✔	

Line Column		✔	`Name`
			`SBQQ__Section__c`
			`SBQQ__Template__c`		

Localization	✔		`SBQQ__APIName__c`
			`SBQQ__Language__c`
			`SBQQ__LineColumn__c`
			`SBQQ__PriceDimension__c`
			`SBQQ__Product__c`
			`SBQQ__ProductFeature__c`
			`SBQQ__ProductOption__c`
			`SBQQ__QuoteTemplate__c`
			`SBQQ__QuoteTerm__c`
			`SBQQ__TemplateContent__c`		

Lookup Data	✔		`SBQQ__Category__c` `SBQQ__Value__c`	✔	

Lookup Query		✔	`SBQQ__PriceRule2__c (was`
			`SBQQ__PriceRule__c in Winter`
			`'17)`
			`SBQQ__LookupField__c`
			`SBQQ__MatchType__c`
			`SBQQ__Operator__c`
			`SBQQ__TestedField__c`
			`SBQQ__TestedObject__c`
			`SBQQ__TestedValue__c`		

Option Constraint		✔	`Name`
			`SBQQ__ConfiguredSKU__c`
			`SBQQ__ConstrainedOption__c`
			`SBQQ__ConstrainingOption__c`
			`SBQQ__OptionConstraintGroup__`
			`c`
			`SBQQ__Type__c`		

Price Action		✔	`SBQQ__Rule__c`
			`SBQQ__Order__c`
			`SBQQ__ValueField__c`
			`SBQQ__SourceLookupField__c`
			`SBQQ__SourceVariable__c`
			`SBQQ__Field__c`
			`SBQQ__TargetObject__c`
			`SBQQ__Value__c`
				✔	

Price Book	✔	✔	`Name` `IsActive`	✔	

Price Book Entry		✔	`Name`
			`Pricebook2Id`
			`ProductCode`
			`CurrencyIsoCode`
					✔

Price Condition		✔	`SBQQ__Rule__c`
			`SBQQ__Field__c`
			`SBQQ__FilterType__c`
			`SBQQ__Value__c`
			`SBQQ__FilterVariable__c`
			`SBQQ__Object__c`
			`SBQQ__Operator__c`
			`SBQQ__TestedVariable__c`
				✔	

Price Dimension		✔	`Name`
			`SBQQ__Product__c`
			`SBQQ__Type__c`
			`SBQQ__DiscountSchedule__c`
			`SBQQ__TermDiscountSchedule__c`
			`CurrencyIsoCode`
					✔

Price Rule	✔	✔	`Name`
			`SBQQ__Active__c`
			`SBQQ__Product__c`
				✔	

Process Input		✔	`Name`
			`SBQQ__QuoteProcess__c`
			`SBQQ__Active__c`		

Process Input Condition		✔	`SBQQ__MasterProcessInput__c`
			`SBQQ__Processinput__c`
			`SBQQ__Active__c`		

			`Name`		

Product	✔	✔	`Name`
			`ProductCode`
			`IsActive`
				✔	

Product Action		✔	`SBQQ__Product__c`
			`SBQQ__Rule__c`
			`SBQQ__Type__c`		

Product Attribute (renamed in Winter '18 – refer to Attribute Item above)		✔	`SBQQ__Attribute__c`
			`SBQQ__Option__c`
			`SBQQ__Feature__c`
			`SBQQ__Product__c`		

Product Attribute Set		✔	`SBQQ__AttributeSet__c`
			`SBQQ__ConfiguredSKU__c`
			`SBQQ__ProductOption__c`
			`SBQQ__Sequence__c`		

Product Feature		✔	`Name` `SBQQ__ConfiguredSKU__c`		

Product Option		✔	`SBQQ__ConfiguredSKU__c`
			`SBQQ__Feature__c`
			`SBQQ__Number__c`
			`SBQQ__OptionalSKU__c`		

Product Rule	✔	✔	`SBQQ__Active__c`
			`Name`
			`SBQQ__Scope__c`
			`SBQQ__Type__c`
				✔	

Quote Process	✔		`Name`	✔	
Quote Template	✔	✔	`Name`	✔	

Quote Term	✔	✔	`SBQQ__PrintOrder__c`
			`SBQQ__Status__c`
			`SBQQ__Type__c`
			`SBQQ__ConditionsMet__c`
			`SBQQ__Active__c`
				✔	

Search Filter		✔	`Name`	✔	

Search Index*		✔	SBQQ__Value__c		
			* If deploying with triggers enabled, you likely do not need to deploy this object because Salesforce auto-generates it.		
Solution Group	✔		Name	✔	
Summary Variable		✔	Name		
Template Content		✔	Name	✔	
Template Section		✔	Name SBQQ__Template__c		
Term Condition		✔	SBQQ__Operator__c SBQQ__TestedField__c SBQQ__Value__c	✔	
Theme	✔		Name	✔	
Upgrade Source		✔	SBQQ__SourceProduct__c SBQQ__UpgradeProduct__c	✔	

APPENDIX A. Template File Contents

The following table lists the JSON-formatted Moover Salesforce CPQ template files and the data set elements contained in each. Bold text in the **Data Set Elements** column indicates the root deployment object of the data set in each template file.

Template File	Data Set Elements (bold indicates the root element)
SBQQ Custom Action Data Set Template.json	Custom Action Condition **Custom Action** Search Filter
SBQQ Custom Script Data Set Template.json	**Custom Script**
SBQQ Discount Category Data Set Template.json	**Discount Category**
SBQQ Import Format Data Set Template.json	Import Column **Import Format**
SBQQ Localization Data Set Template.json	Line Column **Localization** Price Dimension Product Product Feature Product Option Quote Template Quote Term Search Index Template Content
SBQQ Lookup Data Data Set Template.json	**Lookup Data**
SBQQ Price Book Data Set Template.json	**Price Book** Price Book Entry Product
SBQQ Price Rule Data Set Template.json	Lookup Query Price Action Price Condition

	Price Rule Summary Variable
SBQQ Product Data Set Template.json	Additional Document Attribute Item (Winter '18 only) Attribute Set (Winter '18 only) Block Price Configuration Attribute Configuration Rule Cost Discount Category Discount Schedule Discount Tier Error Condition Lookup Query Option Constraint Price Action Price Book Price Condition Price Dimension Price Rule Product Action Product Attribute (Summer '17 only) Product Attribute Set (Winter '18 only) **Product** Product Feature Product Option Product Rule Upgrade Source Summary Variable
SBQQ Product Rule Data Set Template.json	Configuration Rule Error Condition Product Action Product Product Feature **Product Rule** Summary Variable
SBQQ Quote Process Data Set Template.json	Process Input Condition Process Input **Quote Process**

SBQQ Quote Template Data Set Template.json	Additional Document Line Column **Quote Template** Template Content Template Section
SBQQ Quote Term Data Set Template.json	**Quote Term** Summary Variable Template Content Term Condition
SBQQ Solution Group Data Set Template.json	**Solution Group**
SBQQ Theme Data Set Template.json	**Theme**