

CLOUD EXPLORER FOR SALESFORCE

QUICK START GUIDE

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1 Introduction

This document demonstrates a common Cloud Explorer use case, which is to copy data from production to sandbox, and delete data. The following topics are covered:

- Add a Sandbox Organization to your Cloud Explorer Account
- Configure Explore Settings to show Account and Contact objects
- Configure Copy Settings to copy the Contacts related list of the Accounts when Accounts are being copied
- Copy Accounts and their Contacts related list records from the production org to the sandbox org
- Delete data in the sandbox org
- Logout from the org

2 Prerequisites

It is assumed that the user has already created a Cloud Explorer account. For details on how to create a Cloud Explorer account, please refer to the Cloud Explorer User's Guide.

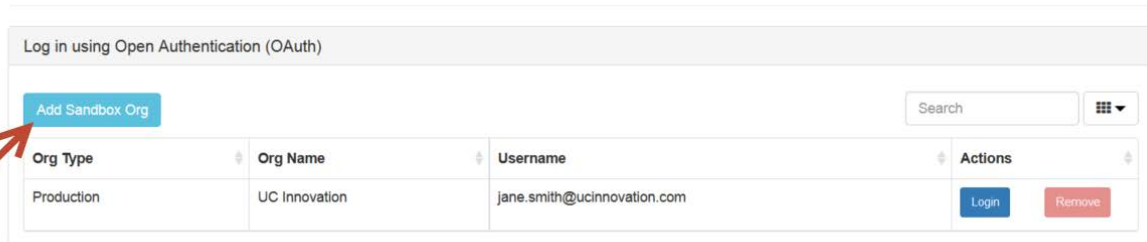
3 Add Sandbox Org

In order to use Cloud Explorer to copy data from a Salesforce production org to a sandbox org, the sandbox org first must be added to your Cloud Explorer account.

1. Log into Cloud Explorer.
2. From the **SFDC Orgs** page, Click on **Add Sandbox Org**.

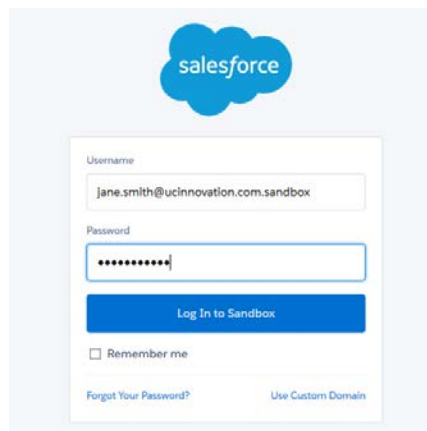
Salesforce Org Login

Log into the Salesforce Org you want to explore.



Org Type	Org Name	Username	Actions
Production	UC Innovation	jane.smith@ucinovation.com	Login Remove

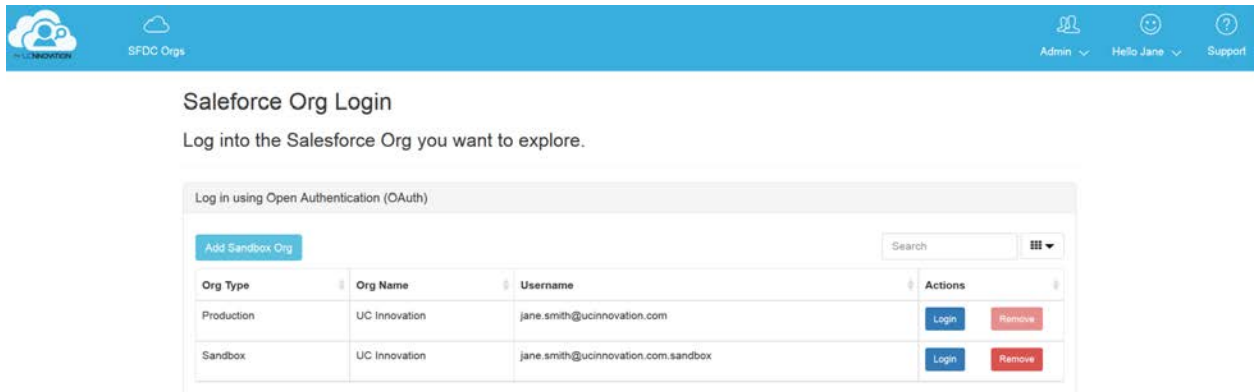
3. Enter your Salesforce Sandbox credentials, and click **Log In to Sandbox**.



Note: To add a custom sandbox org, click on the **Use Custom Domain** link in the Salesforce login page. Then follow steps 4-5 below.

4. Click **Allow** to allow Cloud Explorer to access your Salesforce instance.
5. Click **OK**.

6. Verify that your sandbox org has been successfully added to your Cloud Explorer account.



Once your source org and target org are associated with your Cloud Explorer account, you can log into each org in order to start working with your data.

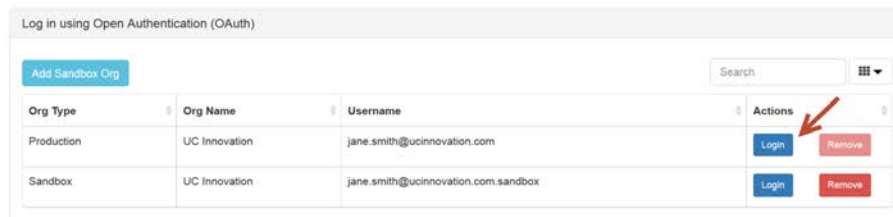
4 Configure Explore Settings

1. Click **Login** on your Salesforce production org. For the purposes of this exercise, this will be the source org.



Salesforce Org Login

Log into the Salesforce Org you want to explore.

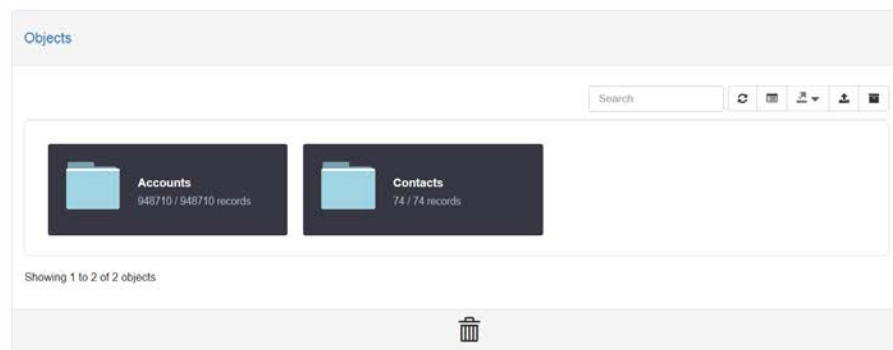


2. A new browser will open Cloud Explorer's Explore menu.



Copy Records Between Salesforce Orgs

Drag and drop folder between browsers.

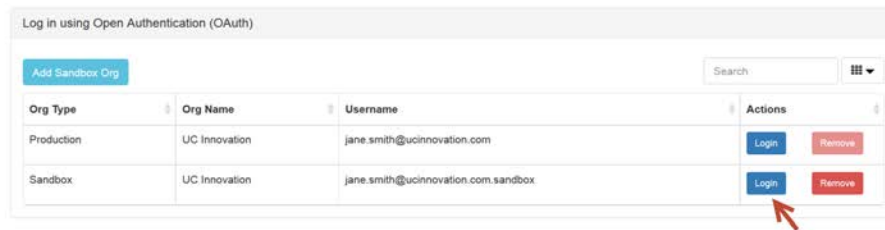


- Repeat steps 7-8 above to open another browser tab for your Sandbox Salesforce Org. For the purposes of this exercise, this will be target org.



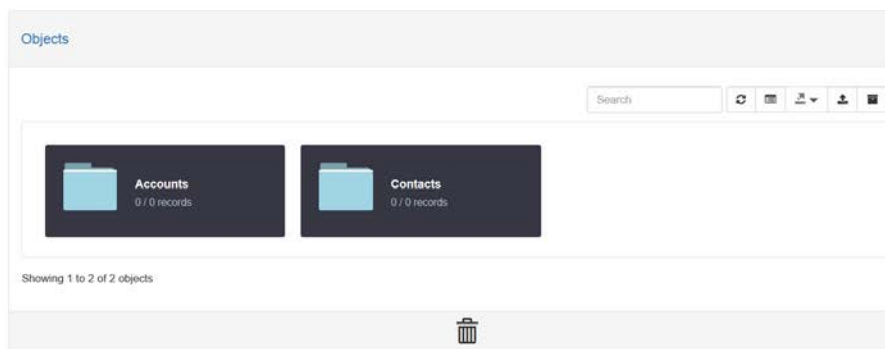
Salesforce Org Login

Log into the Salesforce Org you want to explore.



Copy Records Between Salesforce Orgs

Drag and drop folder between browsers.

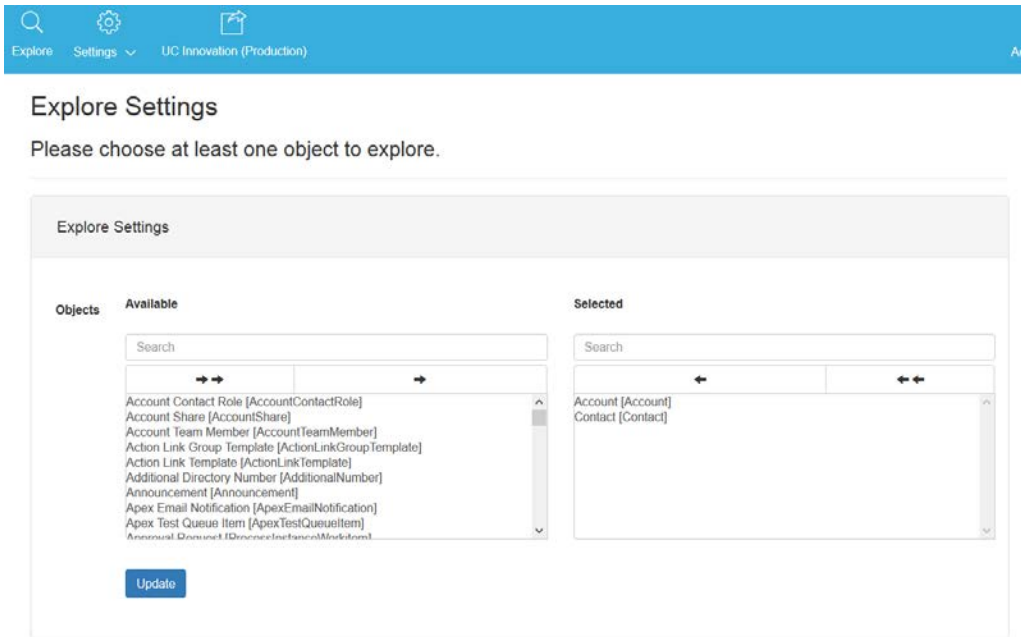


Note: Sandbox orgs have a light brown bar menu, while Production orgs have a blue bar menu within Cloud Explorer.

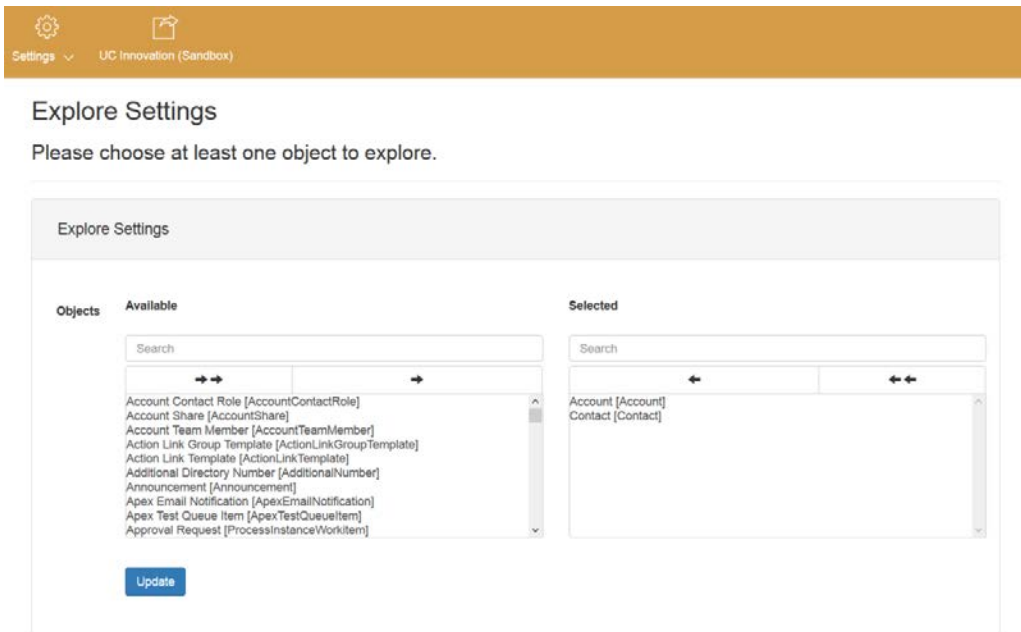
Use the Explore settings to select which Salesforce objects to work with within Cloud Explorer. The objects selected will be available in the Explore menu to view, query, copy, delete, import, and export.

- In your Cloud Explorer Production browser, Choose **Settings** → **Explore**.

5. Move the **Account** and **Contact** Objects from the **Available Objects** section to the **Selected Objects** section, and click **Update** to save these settings.



6. Repeat steps 4-5 above in your Cloud Explorer Sandbox browser.



Note: If you are logged in to your Salesforce org for the first time with Cloud Explorer, you will be directed automatically to the Explore settings page to configure which objects you want to explore. Once you have configured the objects you want to explore, Cloud Explorer will navigate you to the Explore menu the next time you log in.

5 Configure Copy Settings

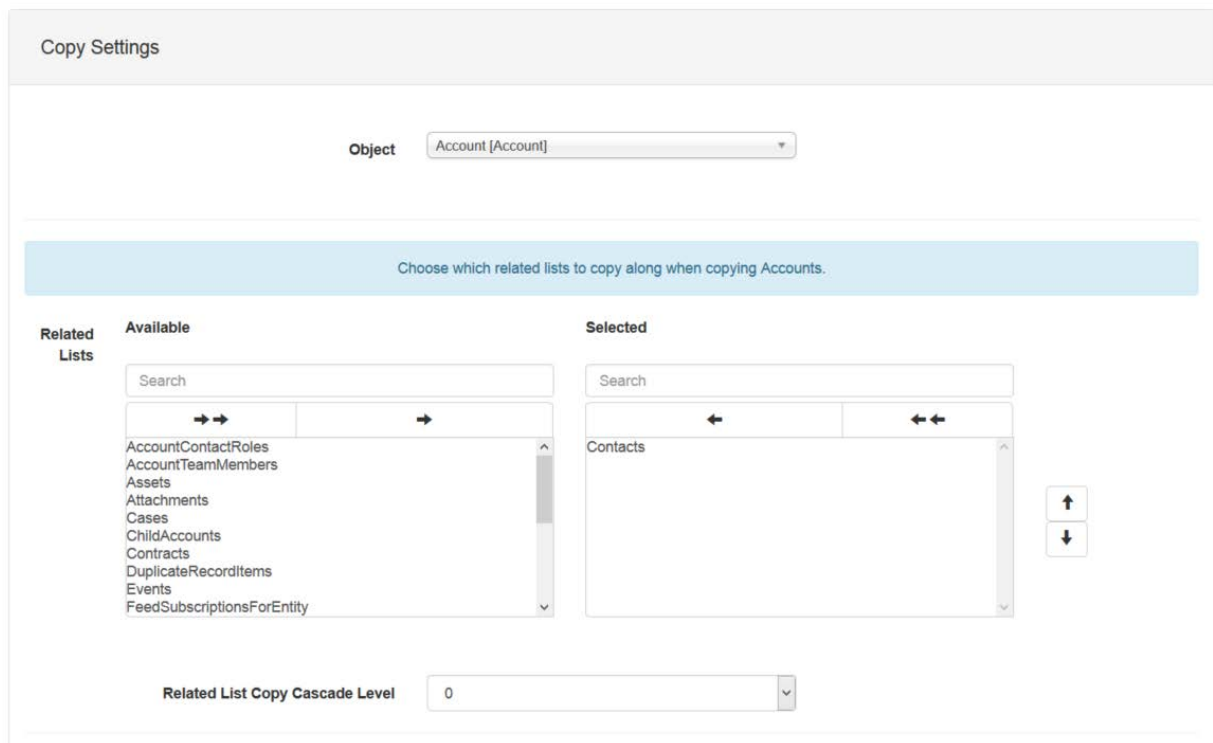
Configure the Copy settings to customize how Salesforce objects are migrated from one Salesforce org to another.

1. In your Cloud Explorer Production browser, Choose **Settings** → **Copy**.
2. Choose the **Account** Object.
3. Move the **Contact** Object from the **Available Objects** section to the **Selected Objects** section, and click **Update** to save these settings.



Copy Settings

Choose how the related list and parent records will be treated when copying.



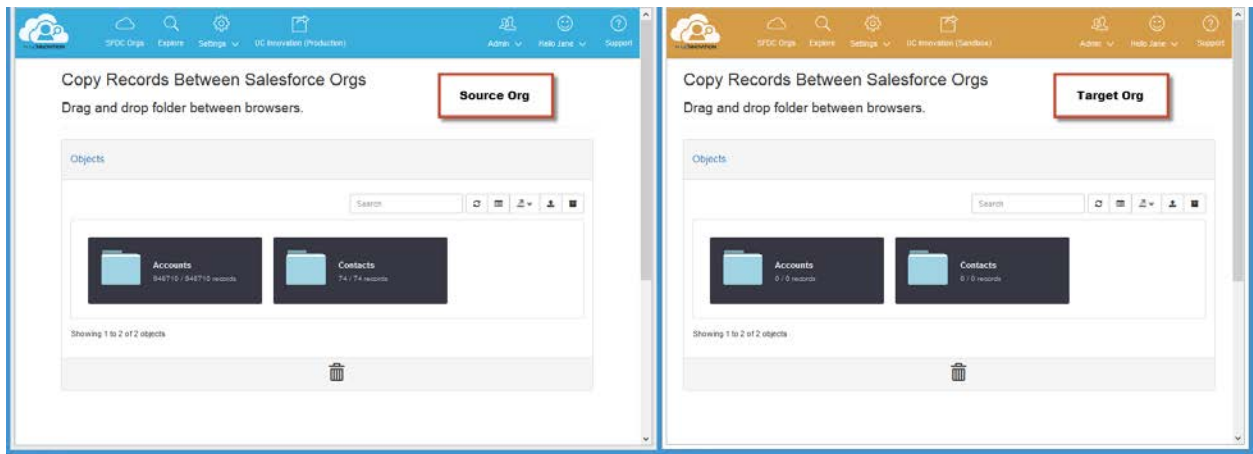
The screenshot shows the 'Copy Settings' interface for the 'Account' object. At the top, the 'Object' dropdown is set to 'Account [Account]'. Below this, a blue banner reads 'Choose which related lists to copy along when copying Accounts.' The interface is divided into two columns: 'Available' and 'Selected'. The 'Available' column contains a search bar and a list of related lists: AccountContactRoles, AccountTeamMembers, Assets, Attachments, Cases, ChildAccounts, Contracts, DuplicateRecordItems, Events, and FeedSubscriptionsForEntity. The 'Selected' column contains a search bar and the 'Contacts' related list. A 'Related List Copy Cascade Level' dropdown is set to '0' at the bottom.

The copy settings above have been configured so that related Contacts will be copied when the Account object records are copied from one org to another.

6 Copying Data from Production to Sandbox

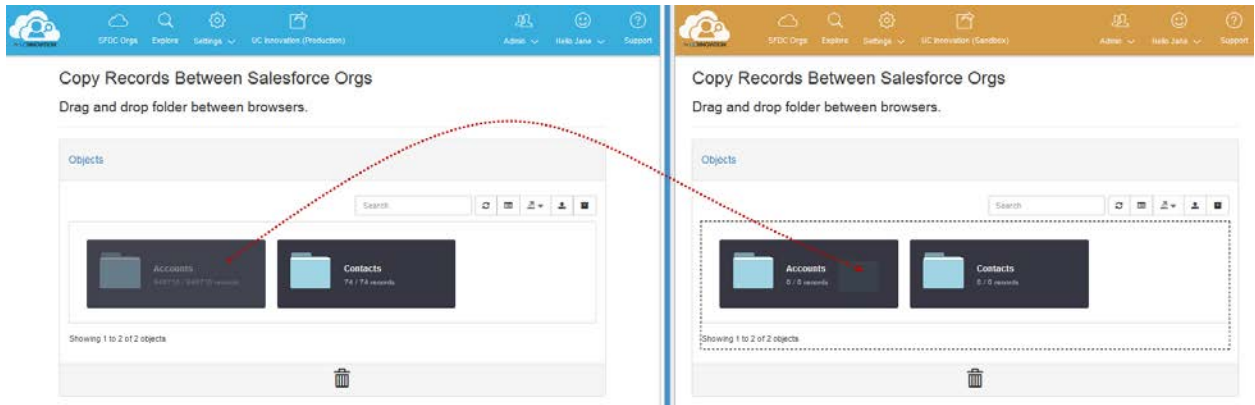
Copying is facilitated by using drag-and-drop functionality. Thus, it is required to have a separate Cloud Explorer browser open for the source org and the target org.

1. Position your Cloud Explorer Production Browser next to your Cloud Explorer Sandbox Browser.



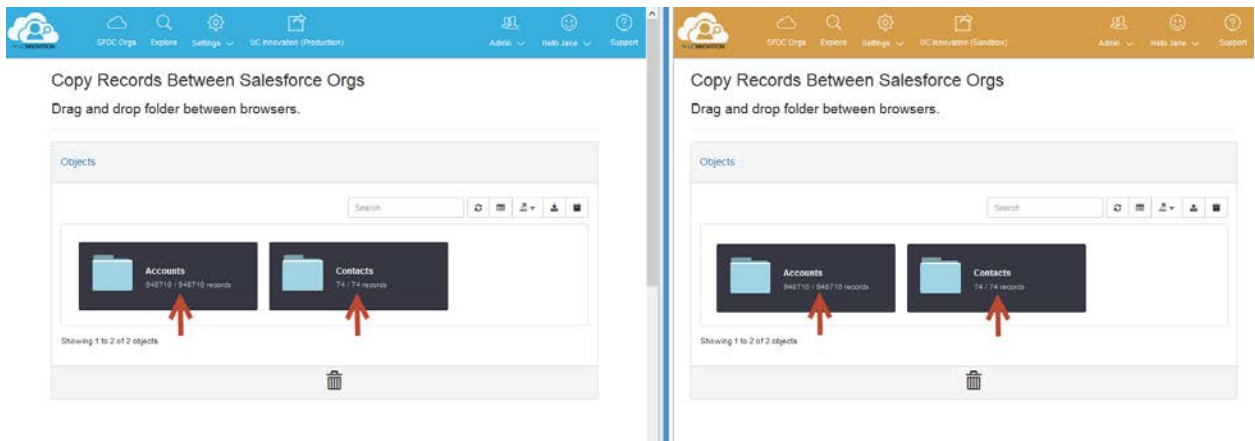
2. Click on the **Explore** menu option in both the source org browser and the target org browser.

3. In the source browser, select the **Account** object, and drag it from the source browser to the objects section in the target browser.



A progress bar will display while the data is being copied over.

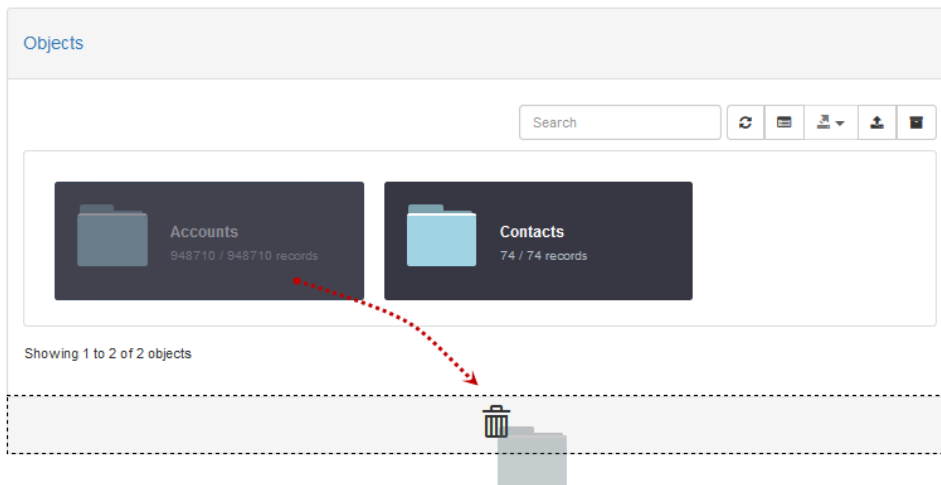
4. Click **OK** to confirm success.
5. Verify that both Account and Contact data has been copied over.



7 Delete Data

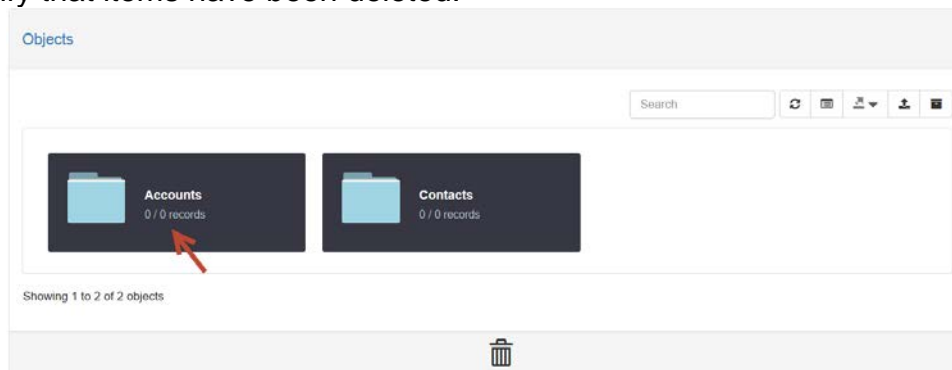
You can use Cloud Explorer to delete data from any Salesforce Object. Similar to the Cloud Explorer Copy function, the Delete function uses drag-and-drop functionality.

1. In your Cloud Explorer Sandbox browser, click on the **Explore** menu option.
2. Select the **Account** Object.
3. Drag the **Account** Object to the **Trash Can**  located at the bottom of the page.



Dragging an object to the trash can will delete all records for the object. In this case, all the Account records will be deleted.

4. Click **OK** to confirm deletion.
5. Click **OK** to confirm success.
6. Verify that items have been deleted.



8 Logout

To logout from Cloud Explorer:

1. Choose **<User Name> → Logout.**