# Migrata User Documentation

This document is for **Migrata by Selegic Inc.**, which would help you to understand the application, its features and allow you to operate it more efficiently.

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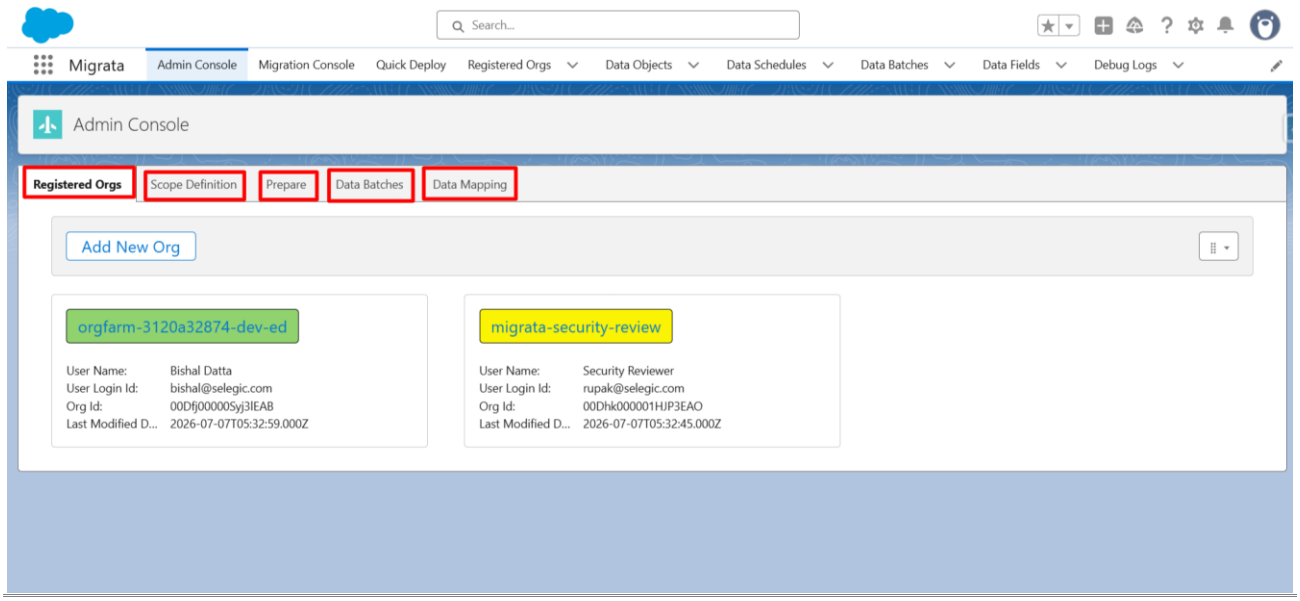
# 1. Setting up Migrata

Before we start to use the application, we need to set it up with the important fields.

> **Note:** You will have to set up the application again if you reinstall.

## First-Time Setup Steps

1. Log in to the **Admin Console** for the very first time
2. Head over to the **Scope Definition** tab
3. Under **Data Object Scope**, click the **Reset Default** button — this resets all fields to their default values (one-time operation)
4. Click the **Update List** button at the bottom left — this populates all required fields with their default values
5. After completing Scope Definition, head over to the **Prepare** tab and click **Prepare Metadata**




## 2. Admin Console Overview

The **Admin Console** is the primary setup and configuration area. You will find the following tabs:

| Tab | Purpose |
|---|---|
| **Registered ORGs** | Register new Source, Console and Destination ORGs |
| **Scope Definition** | Define the scope of objects and fields for migration |
| **Prepare** | Prepare metadata — creates DataObjects, DataFields and External IDs |
| **Data Batches** | Create and manage DataSets for your ORGs |
| **Data Mapping** | Select External IDs, manage Unique Fields and Sync Ext IDs |

## 3. Scope Definition

The **Scope Definition** tab is where you define which Salesforce objects and fields are included in the migration. It is divided into two sections: **Data Object Scope** and **Data Field Scope**.

### Data Object Scope

| Field | Description |
|---|---|
| **Include Standard Objects** | Used to include the Standard Salesforce Objects you wish to migrate |
| **Include Custom Objects** | Used to include Non-Standard (self-created) Objects |
| **Include Default Exclude Objects** | Fill this with objects that are excluded by default but you want to include |
| **Package Prefix** | Fill with the prefix for your organization (e.g. `selmga`) |

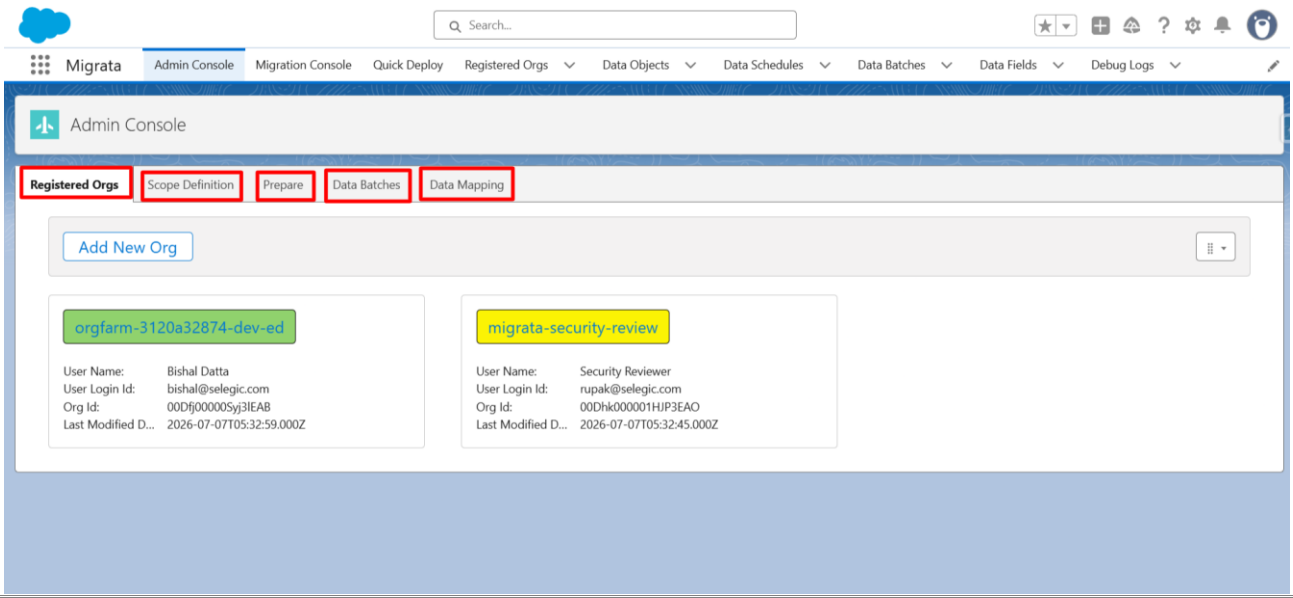
| Field | Description |
|---|---|
| **Exclude Object List** | Objects you want to explicitly avoid migrating |

## Data Field Scope

| Field | Description |
|---|---|
| **Exclude Fields** | Fields you want to avoid creating/migrating |
| **Audit Fields** | Creation time, modification time and other metadata fields in the ORGs |
| **Self Made Reference** | If a field is a string type referring to another object, add the field names here to create them along with the reference |
| **Audit Field Enabled** | Enable this checkbox so that Audit Fields get created |
| **Include Default Exclude Fields** | Fill this when a field has been excluded by default but you wish to include it |
| **Default Excluded** | Fill this to exclude fields you do not wish to create |

## Steps to complete Scope Definition

1. Navigate to the **Scope Definition** tab in Admin Console
2. Under **Data Object Scope**, click **Reset Default** (one-time operation)
3. Click **Update List** at the bottom left to populate default values
4. Configure **Data Field Scope** fields as needed
5. Proceed to the **Prepare** tab



# 4. Adding a New ORG

Before running any migration, you must register the ORGs Migrata will work with.

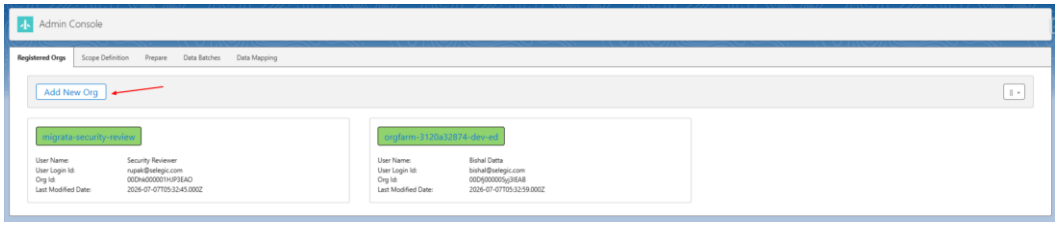
## Understanding ORG Types

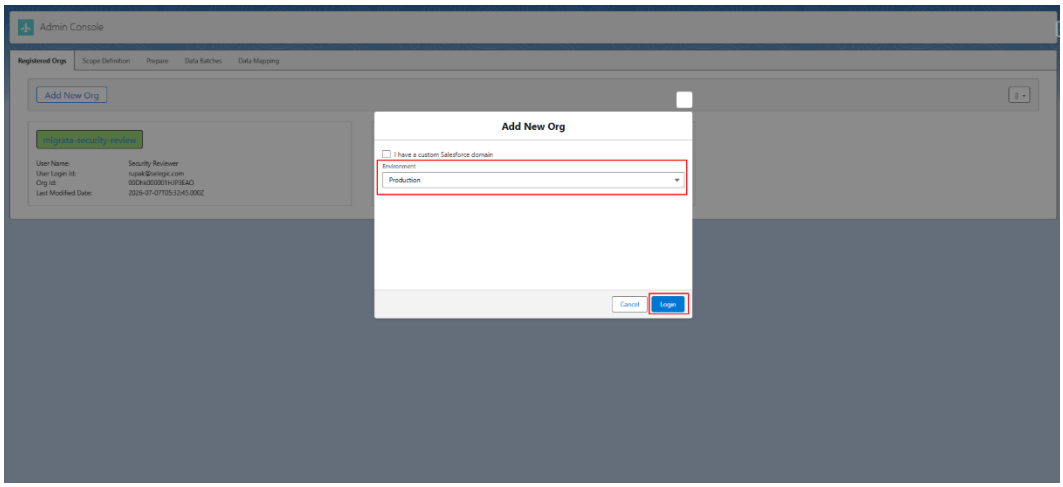
| ORG Type | Description |
|---|---|
| **Engine / Console ORG** | The org where Migrata is installed — coordinates all operations |
| **Source ORG** | The org from which data will be migrated |
| **Target ORG** | The org into which data will be migrated |

## Steps to Add a New ORG

1. In the Admin Console, navigate to the **Registered ORGs** tab
2. Click **Add New Org**
3. In the dialog that opens:
    - If you have a custom Salesforce domain, check **I have a custom Salesforce domain** and enter your domain name
    - Select the **Environment** — Production or Sandbox
4. Click **Login** — this initiates OAuth and registers the org
5. The new ORG card appears in the grid showing its Domain Name, User Name, User Login Id, Org Id, and Last Modified Date

The Registered ORGs tab will show all your registered ORGs as cards. You can sort them using the menu at the top right: **Sort Z-A**, **Sort A-Z**, or **By Date**.



# 5. Deploying Metadata and Assigning Permissions

Once your ORGs are registered, you need to deploy the Migrata Apex classes and assign permissions to each org.

## Steps

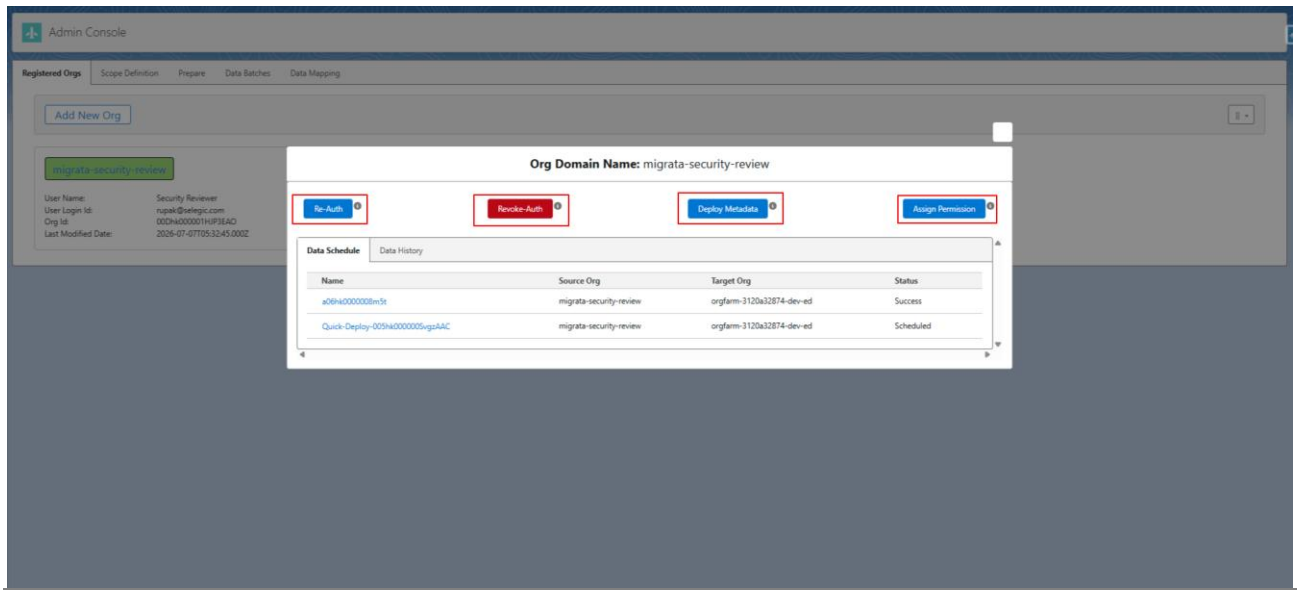
1. In the **Registered ORGs** tab, click on the name of the ORG you want to configure
2. A pop-up will open showing the ORG domain name. You will see the following buttons:

| Button | Action |
|---|---|
| **Re-Auth** | Re-authorize the org — use this when the auth token has expired |
| **Revoke-Auth** | Remove authentication — the org will no longer have access to Migrata |
| **Deploy Metadata** | Deploys the required Migrata integration components into the registered org so it can participate in migrations. Specifically, this installs the Apex classes needed for the Target org to receive and process data (`TargetOrgMaintenanceApi`, `ObjectFieldsApi`, `RevenueCloudDataHelper`, `MigrataDateInfoBatch`), the `MigrataDateInfo__c` custom object, and the `Migrata_API` permission set. Must be run for every Source and Target org before migration. A "See Details" link appears once complete. |
| **Assign Permission** | Assigns all required permissions (`Migrata_API` permission set) to the org |

1. Click **Deploy Metadata** first — this installs the required integration Apex classes, the `MigrataDateInfo__c` object, and the `Migrata_API` permission set into the org
2. Then click **Assign Permission** — this assigns all permissions required for migration

The pop-up also shows two sub-tabs:

- **Data Schedule** — all schedules linked to this org
- **Data History** — historical migration runs for this org




# 6. Operations — Prepare Metadata

After completing the Scope Definition, head over to the **Prepare** tab and run **Prepare Metadata**. This generates the DataObject and DataField records in Salesforce.

## Steps

1. Navigate to the **Prepare** tab in Admin Console
2. Click the **Prepare Metadata** button
3. A progress indicator shows the following steps in sequence:
    - Create Data Objects
    - Ext Id for Console Org
    - Add Ext Id Permission
    - Create Data Fields
    - Update Depended On And By Objects
    - Completed
4. Wait for all steps to complete before moving on

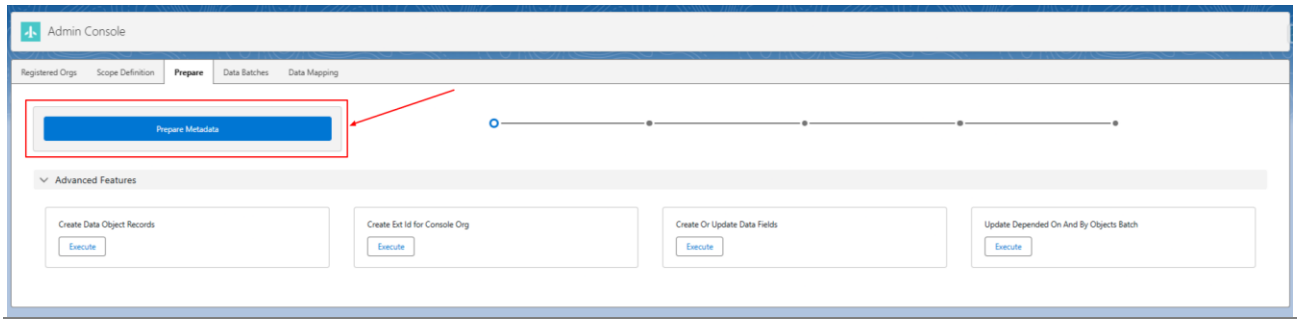
The progress bar on the left displays the application progress and the modifications that need to be updated.

## Advanced Features

Below the main Prepare Metadata button, you'll find **Advanced Features** (collapsible panel) with individual operations:

| Operation | Description |
|---|---|
| **Create Data Object Records** | Creates or updates DataObject__c records for all in-scope objects |
| **External IDs** | Creates External ID fields for the Console org |

| Operation | Description |
|---|---|
| **Create or Update Data Fields** | Creates or updates DataField__c records for all in-scope fields |
| **Update Depended On And By Objects Batch** | Recalculates object dependency relationships for all batches |




# 7. Creating Data Batches

This is the most important part of your Migrata application as it allows you to create and manage the Data Batches for your migration.

## Steps

1. Navigate to the **Data Batches** tab in Admin Console
2. The page shows all existing batches as cards. Use the **search bar** to quickly find a batch by name.
3. Click **Add Data Batch** to create a new batch
4. Fill in the fields in the dialog that opens:
    - **Name** (required)
    - **Description**
    - **Target Operation** (required) — e.g. Upsert, Insert
    - **Quick Deploy** checkbox — enable for selective record deployment using External IDs
5. Click **Save**

The batch card will now appear in the grid and is ready for configuration.

## Batch Card Actions

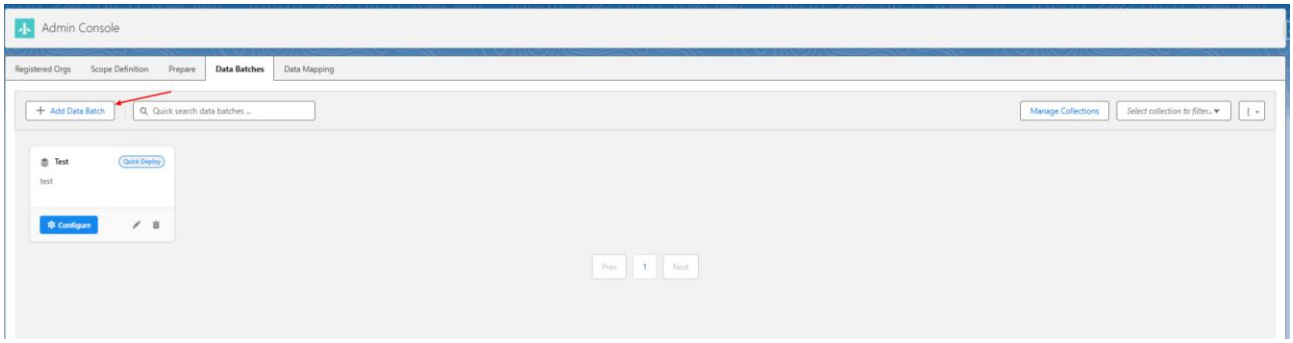
Each batch card shows the batch name and description. The card has three action buttons:

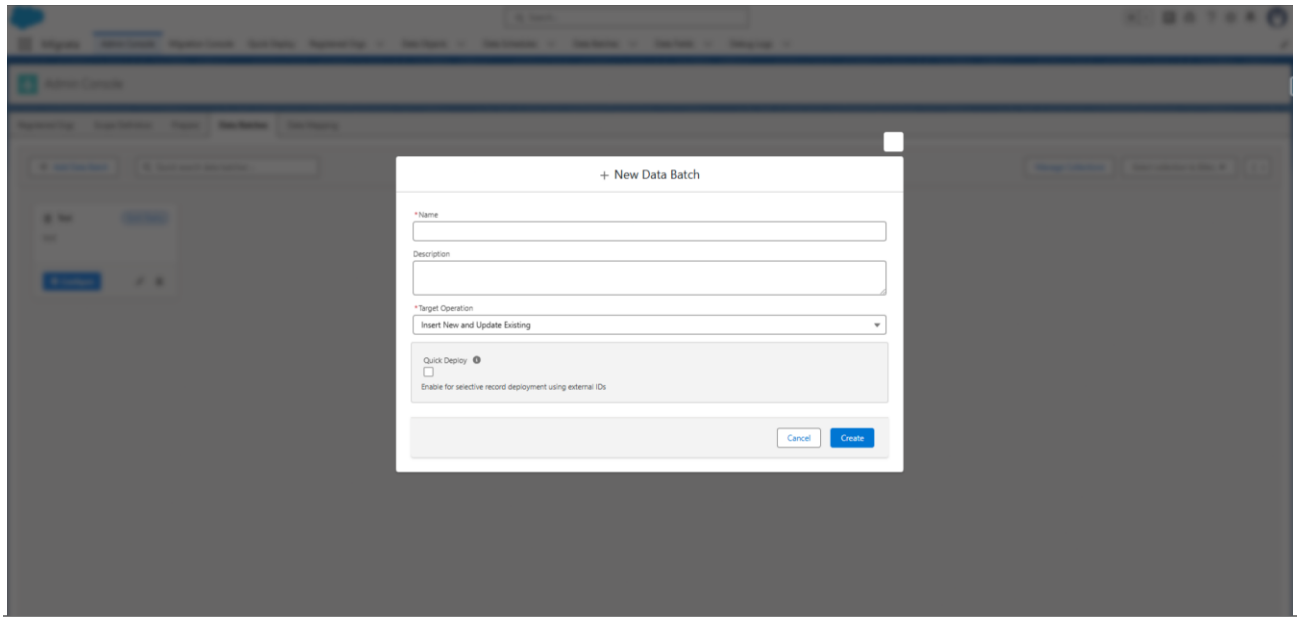
| Button | Action |
|---|---|
| **Configure** (gear icon) | Opens the batch configuration — where you set up Data Batch Items and object hierarchy |
| **Edit** (pencil icon) | Edit the batch name, description, and target |

| Button | Action |
|---|---|
| | operation |
| **Delete** (trash icon) | Permanently delete the batch (shows a confirmation prompt first) |

### Other Header Controls

- **Search bar** — type to quickly search and filter batches. Clicking a result directly opens that batch's Configure modal.
- **Manage Collections** — manage groupings of batches (see Section 9)
- **Collection filter dropdown** — filter the batch grid by collection
- **Three-dot menu** — Sort A-Z, Sort Z-A, Default View, **Restore CPQ Defaults** (restores the default CPQ batch set), **Restore RLM Defaults** (restores the default RLM batch set)




## 8. Configuring Data Batch Items

Data Batch Items define the individual objects and their hierarchy within a batch. Migrata uses a hierarchical model where objects are organized by levels.

## Understanding the Hierarchy Model

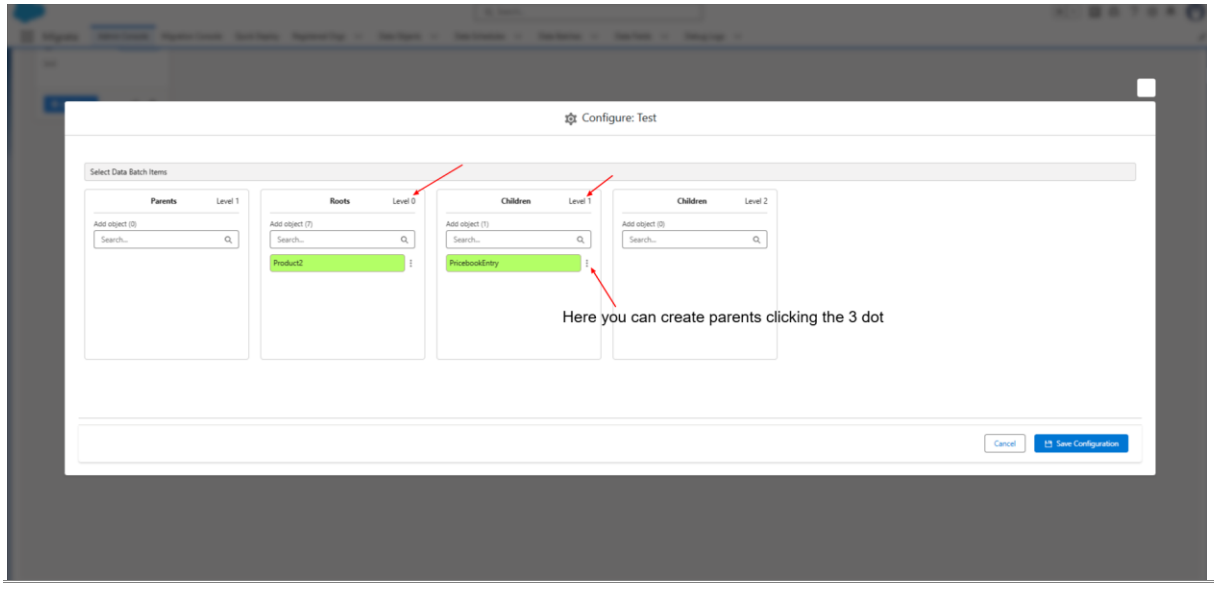
Migrata organizes batch items into four levels:

```
Root        (Level 0 — top of the hierarchy, parent of all)
Parent      (Level 1 — direct children of Root)
Child L1    (Level 2 — children of Parent)
Child L2    (Level 3 — children of Child L1)
```

- **Root** is the top of the hierarchy — the parent of all other items
- **Parent** items are direct children of Root
- **Child L1** items are children of Parent
- **Child L2** items are children of Child L1

## Steps to Configure Batch Items

1. On a batch card in the **Data Batches** tab, click the **Configure** button (gear icon)
2. The **Configure: {Batch Name}** modal opens
3. The modal shows a panel titled **Select Data Batch Items** with four sections (Root, Parent, Child L1, Child L2)
4. At each level, use the **search box** to find and add objects
5. Once an object is added to a level, click the **three-dot menu** on that object to:
    - **Childs** (for parent/root items) — define child relationships
    - **Parents** (for child items) — define parent relationships
    - **Filter** — set download filters for this object in the batch
    - **Delete** — remove the object from this level
6. Once all objects and relationships are defined, click **Save Configuration**
7. Click **Cancel** to discard changes



# 9. Batch Collections

Batch Collections let you group multiple Data Batches together so you can filter and organize them easily.

## Creating a Collection

1. In the **Data Batches** tab, click **Manage Collections**
2. The Manage Collections modal shows all existing collections
3. Click **New Collection**
4. Enter a **Collection Name**
5. Use the **dual listbox** to move batches from Available to Selected
6. Click **Save**

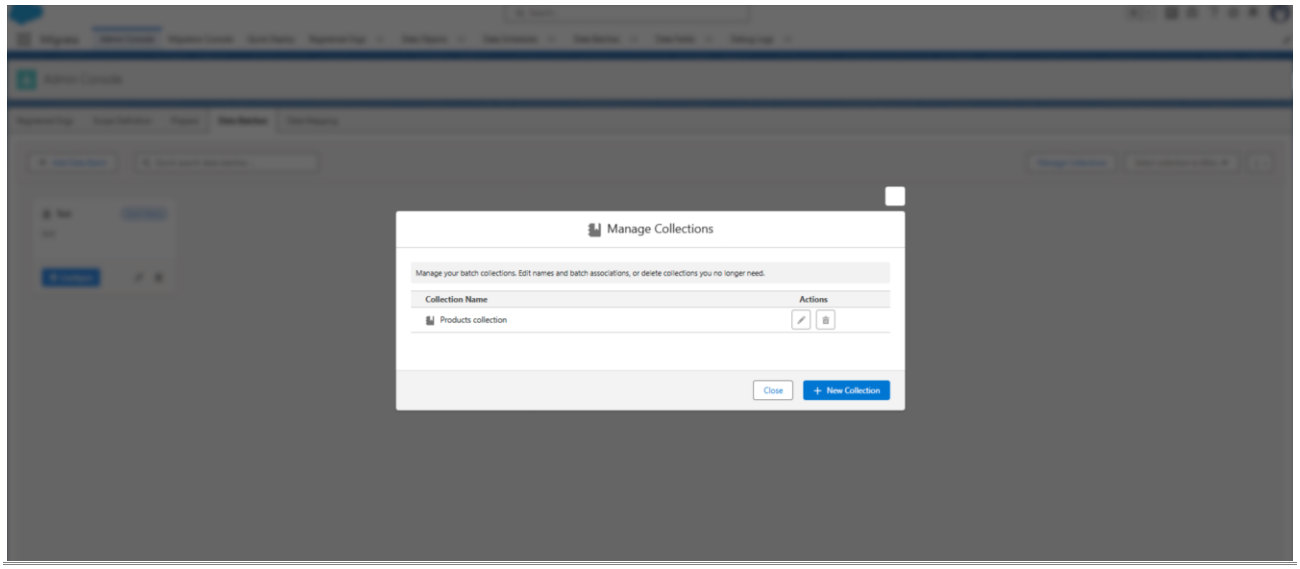
## Managing Existing Collections

From the **Manage Collections** modal you can:

- Click the **Edit** icon on a collection to rename it or change which batches it contains
- Click the **Delete** icon to permanently remove a collection (the batches themselves are not deleted)

## Filtering by Collection

- Use the **Collection filter dropdown** in the Data Batches header to filter the batch grid by a specific collection
- A badge appears at the top of the page showing the active filter — click the × on the badge to clear it




# 10. Data Mapping

The **Data Mapping** tab provides tools for managing External IDs and Unique Fields across your

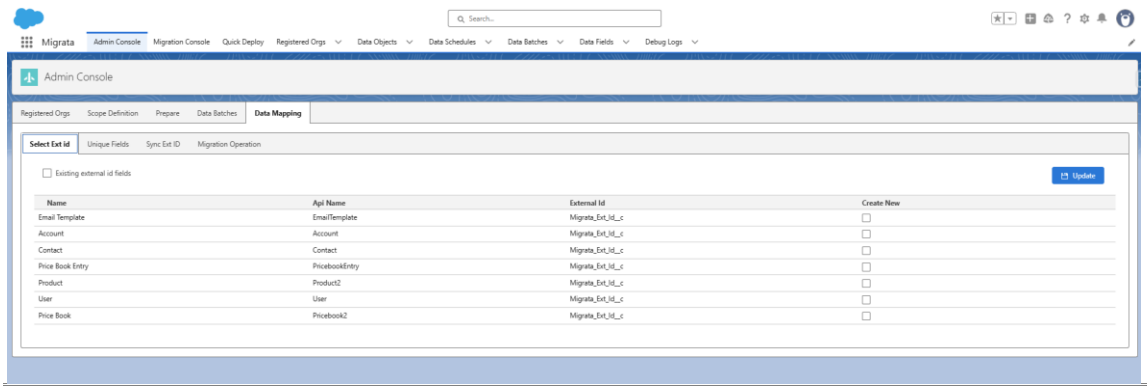
orgs. It contains four sub-tabs:

| Sub-Tab | Purpose |
|---|---|
| **Select Ext Id** | Select which External ID field to use for the migration |
| **Unique Fields** | View and manage unique fields per object |
| **Sync Ext ID** | Sync External ID values across orgs when multiple Ext IDs exist |
| **Migration Operation** | Additional object-level migration operations |

### Select Ext Id

Use this sub-tab to choose the External ID field that Migrata will use to match records during upsert operations.

1. Navigate to **Data Mapping → Select Ext Id**
2. Select the Ext ID field from the available list
3. Save your selection




# 11. Migration Console

The **Migration Console** is where you execute the actual data migration. It is a split-panel layout:

- **Left sidebar** — a searchable list of all Data Schedules. Each schedule shows the Data Batch name, Source Org, and Target Org. Use the **three-dot menu** on a schedule to Edit or Delete it.
- **Top right** — quick navigation buttons for **Registered Orgs** and **Data Batches**
- **Main panel** — shows the selected schedule's details and 8 action tabs

### Schedule Header

When you select a schedule from the sidebar, the header shows:

- **Data Batch** — name of the batch (clickable link to the record)
- **Source** — source org name with a green  (authenticated) or red  (expired) icon

- **Target** — target org name with the same auth indicator
- **Status** — Active / Inactive badge

If the auth icon shows red for Source or Target, click the **Re-Auth** button that appears inline next to the org name.

## Creating a New Data Schedule

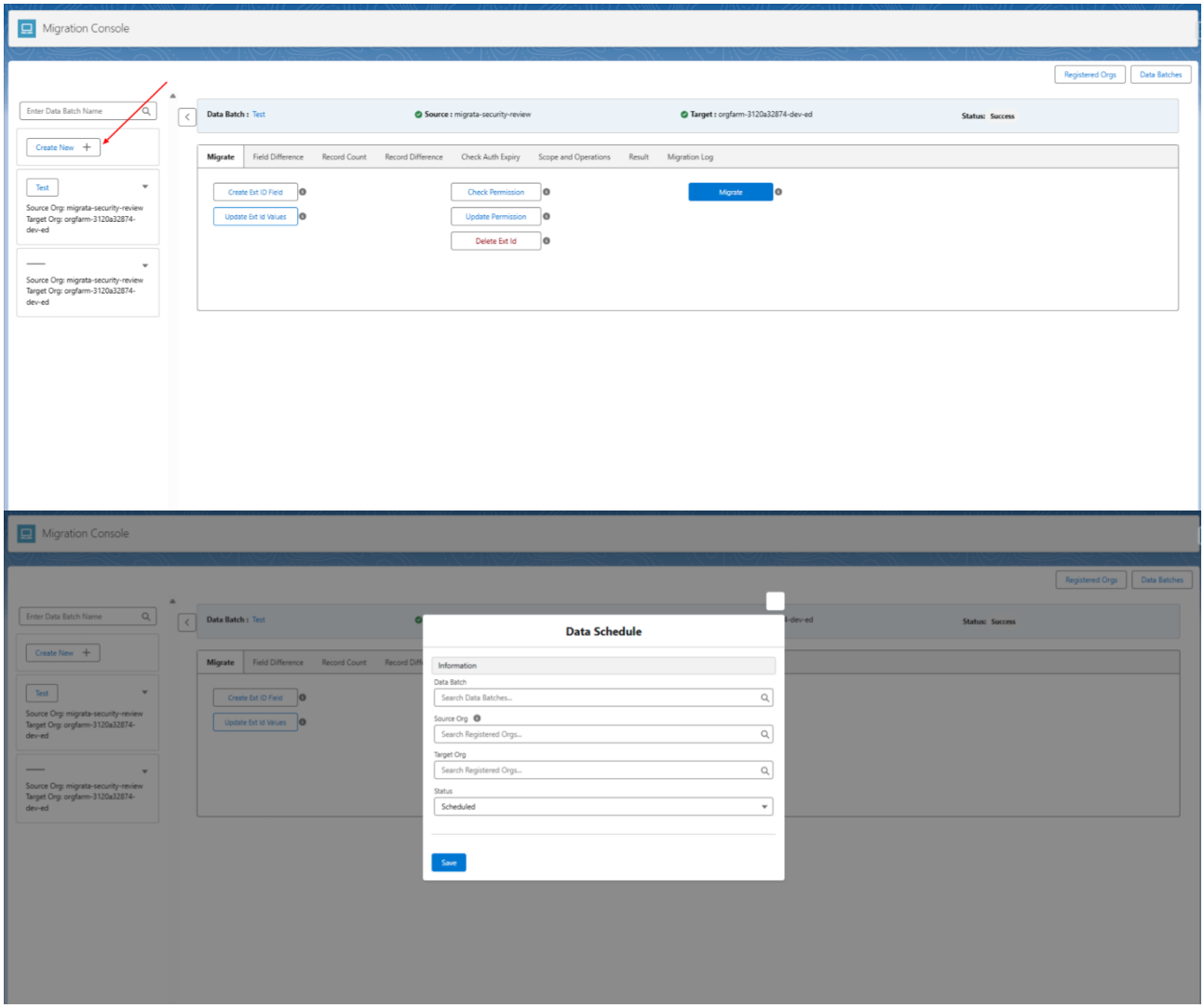
1. In the left sidebar, click **Create New +**
2. The **Data Schedule** modal opens — fill in:
    - **Data Batch** — select the batch to use
    - **Source Org** — the org to extract data from
    - **Target Org** — the org to load data into
    - **Status** — Active or Inactive
3. Click **Save**

The new schedule appears in the sidebar list and is ready to use.

## Migration Console Tabs

Once a schedule is selected, the main panel shows these 8 tabs:

| Tab | Purpose |
|---|---|
| **Migrate** | Run the migration and manage Ext IDs and permissions |
| **Field Difference** | View and act on schema differences between Source and Target |
| **Record Count** | See total record counts per object |
| **Record Difference** | Compare records between Source and Target |
| **Check Auth Expiry** | View authentication status for all orgs |
| **Scope and Operations** | View objects in scope for the current batch |
| **Result** | View detailed action logs for each migration run |
| **Migration Log** | View server-side error and migration logs |




# 12. Running a Migration

The **Migrate** tab is the main execution area. It contains all the buttons needed to prepare and run a migration.

## Action Buttons

### Ext ID Operations:

| Button | Description |
|---|---|
| **Create Ext ID Field** | Creates the External ID custom field in both Source and Target orgs |
| **Update Ext Id Values** | Inserts/updates External ID field values in the Source org only |

### Permission Operations:

| Button | Description |
|---|---|
| **Check Permission** | Checks if objects have the Migrata_API |

| Button | Description |
|---|---|
| | permission set assigned. Shows a table with Source and Target permission status. |
| **Update Permission** | Assigns objects and their fields to the Migrata_API permission set |
| **Delete Ext Id** | Permanently deletes the External ID field from both Source and Target orgs — shows a warning confirmation first |

**Migration:**

| Button | Description |
|---|---|
| **Migrate** | Runs the data migration from Source to Target org |
| **Check Rule Dependencies** | *(Only shown when applicable)* Checks if all records referenced by ProductConfigurationRules exist in the Target org |

## Running the Migration

1. Select a Data Schedule from the left sidebar
2. Verify the Source and Target auth icons are both green — if not, click **Re-Auth**
3. If not done already, click **Create Ext ID Field** — wait for completion
4. Click **Update Ext Id Values** — wait for completion
5. Click **Check Permission** to verify permissions are in place
6. If permissions are missing, click **Update Permission**
7. Click **Migrate** to start the migration

Once you click Migrate:

- A **Migration Progress** bar appears showing the current percentage and status message
- When complete, a **Migration Results** table shows per-object counts: Inserted, Updated, Skipped, Failed

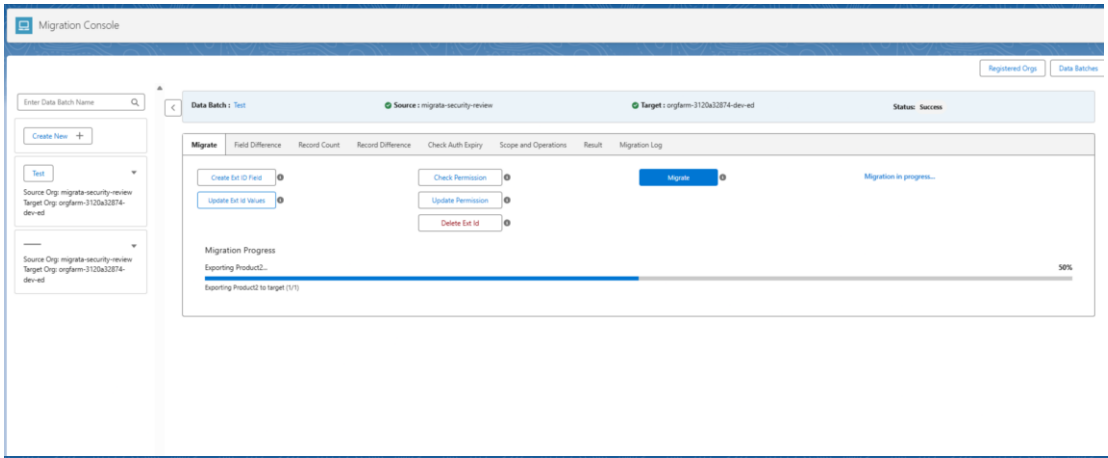
**Auth mismatch warning:** If the current Source/Target differs from the last used Source/Target, a pop-up warns you and asks you to confirm before continuing.

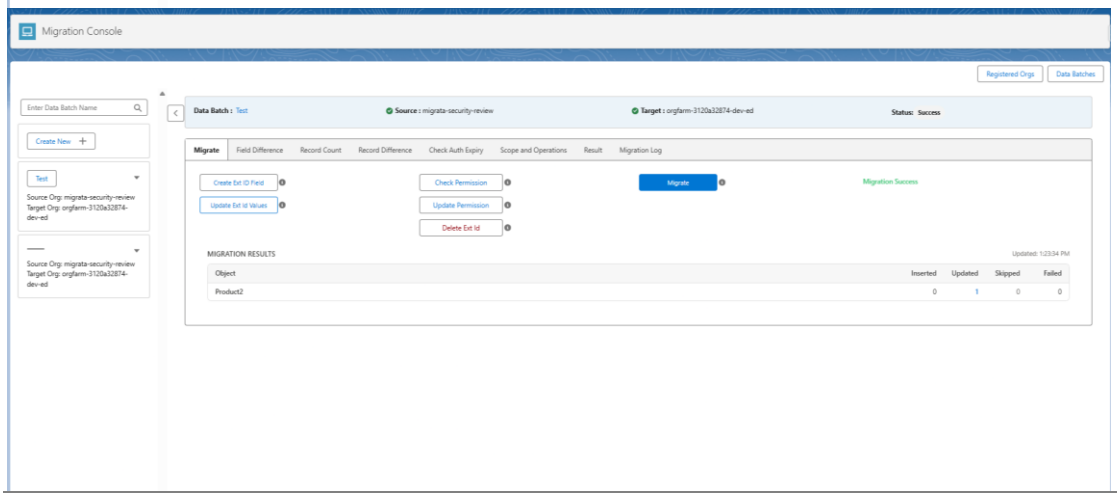
## Check Rule Dependencies (if shown)

If the **Check Rule Dependencies** button appears:

1. Click it to check that all dependent records exist in the Target org
2. A **Rule Dependency Status** table appears showing per-object: Total Referenced, Found in Target, Missing, Outdated

3. If issues are found:
    - Click **Deploy Missing to Target** to push missing records
    - Click **Sync Outdated to Target** to update outdated records
    - Click **See Differences** to view a diff of outdated records




## 13. Field Difference and Deploy

The **Field Difference** tab lets you view and act on schema differences between Source and Target orgs.

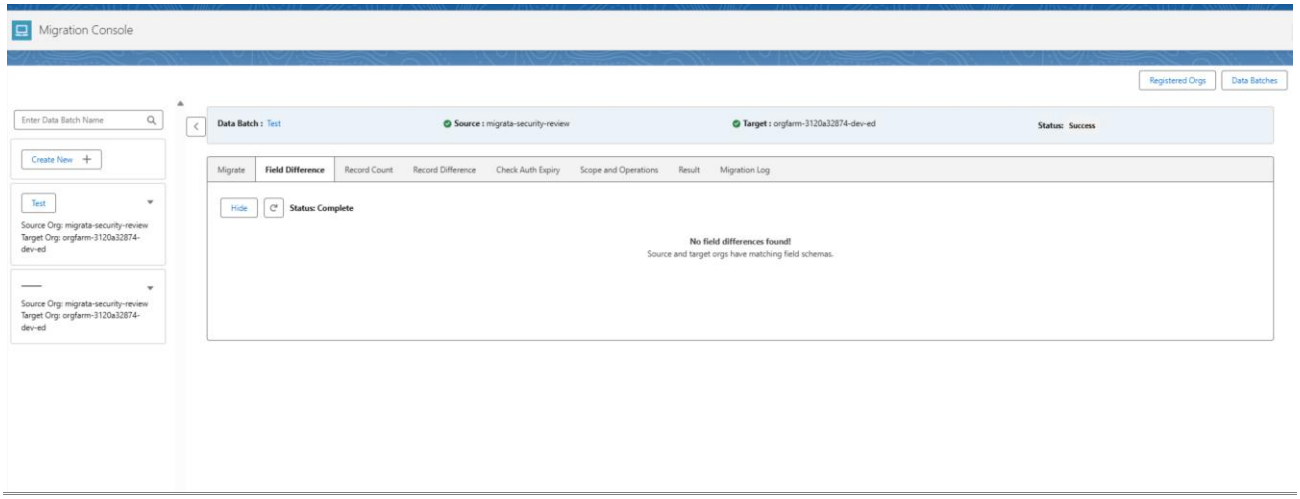
### Viewing Field Differences

1. Select a Data Schedule from the sidebar
2. Click the **Field Difference** tab
3. Select **Source** and **Target** from the dropdowns
4. Select a **Field Scope** from the dropdown:
    - **Full** — shows all differences between Source and Target
    - **Schema** — shows object schema differences only
5. Click **View Field Difference**

### Acting on Differences

For each difference shown, you can take one of four actions:

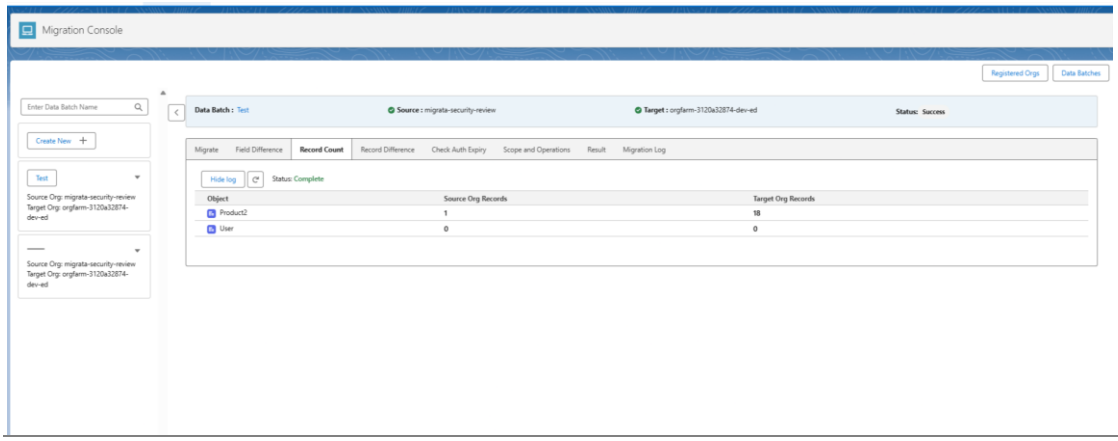
| Button | Behavior |
|---|---|
| **Deploy** | Deploys the schema change to the Target org |
| **Delete** | Removes the differing field from the comparison |
| **Ignore** | Marks this difference to be skipped going forward |
| **Unignore** | Reverses a previously Ignored difference |




## 14. Record Count

The **Record Count** tab shows the total number of records per object in the current schema for the selected Data Schedule.

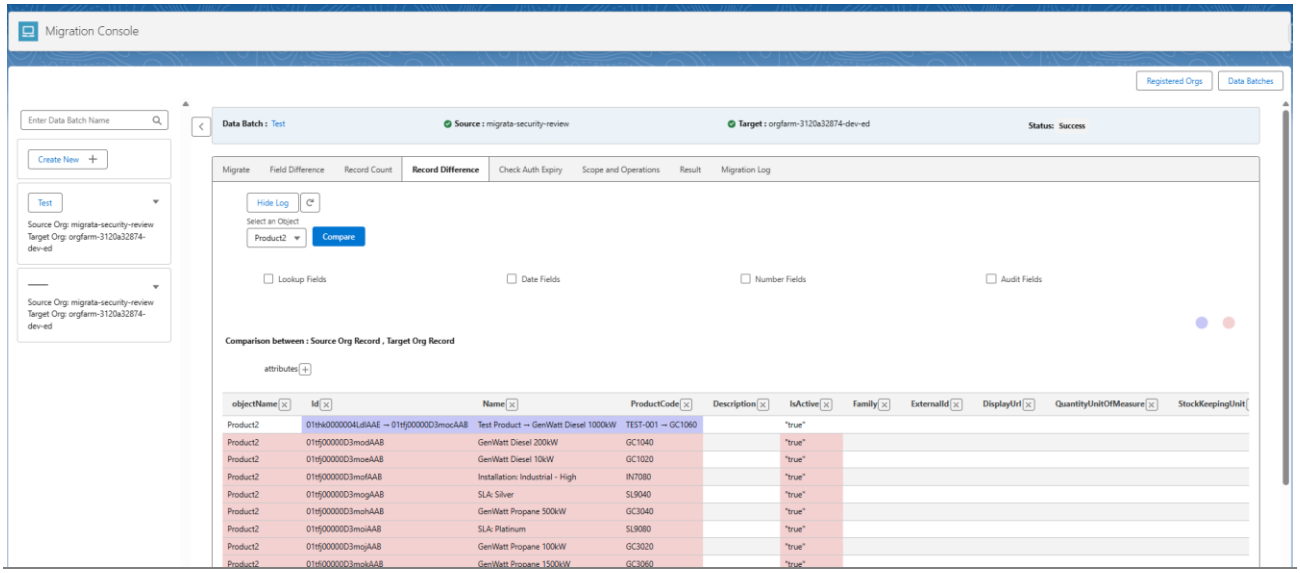
1. Select a Data Schedule from the sidebar
2. Click the **Record Count** tab
3. The table shows each object name and its total record count



## 15. Record Difference

The **Record Difference** tab compares record-level data between Source and Target, showing which records exist in one org but not the other.

1. Select a Data Schedule from the sidebar
2. Click the **Record Difference** tab
3. Review the differences shown — records in Source not in Target and vice versa

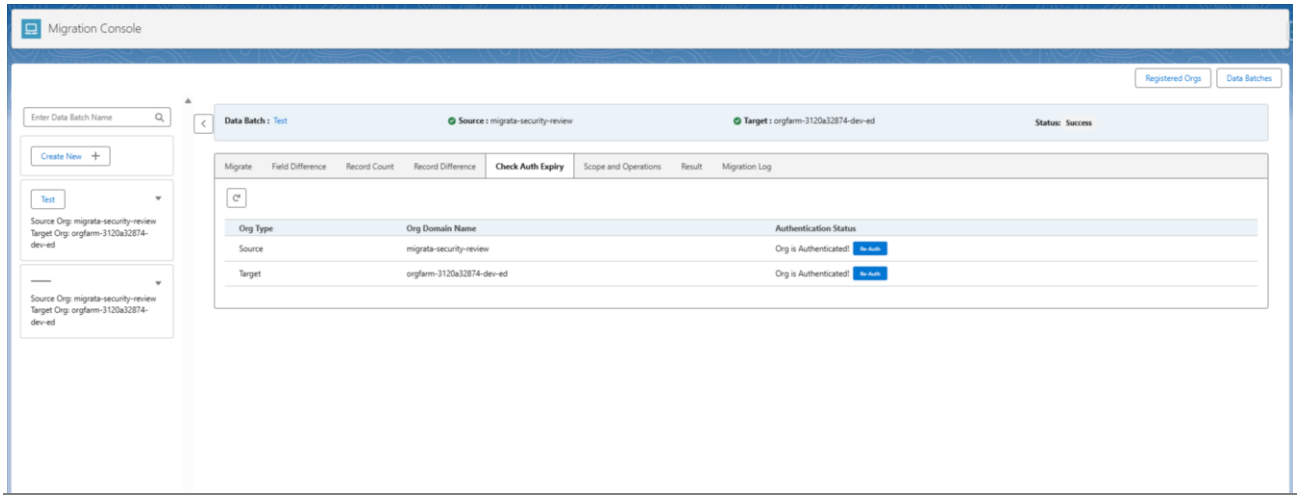



## 16. Check Auth Expiry

The **Check Auth Expiry** tab shows the authentication status for all orgs in the selected schedule.

1. Select a Data Schedule from the sidebar
2. Click the **Check Auth Expiry** tab
3. The table shows:
    - **Org Type** — Source, Target, or Console
    - **Domain Name** — the org's domain
    - **Authentication Status** — Authenticated or Expired

Use this to verify that all orgs are ready before running a migration. If any show as Expired, go to **Registered ORGs** and click **Re-Auth** on that org card.



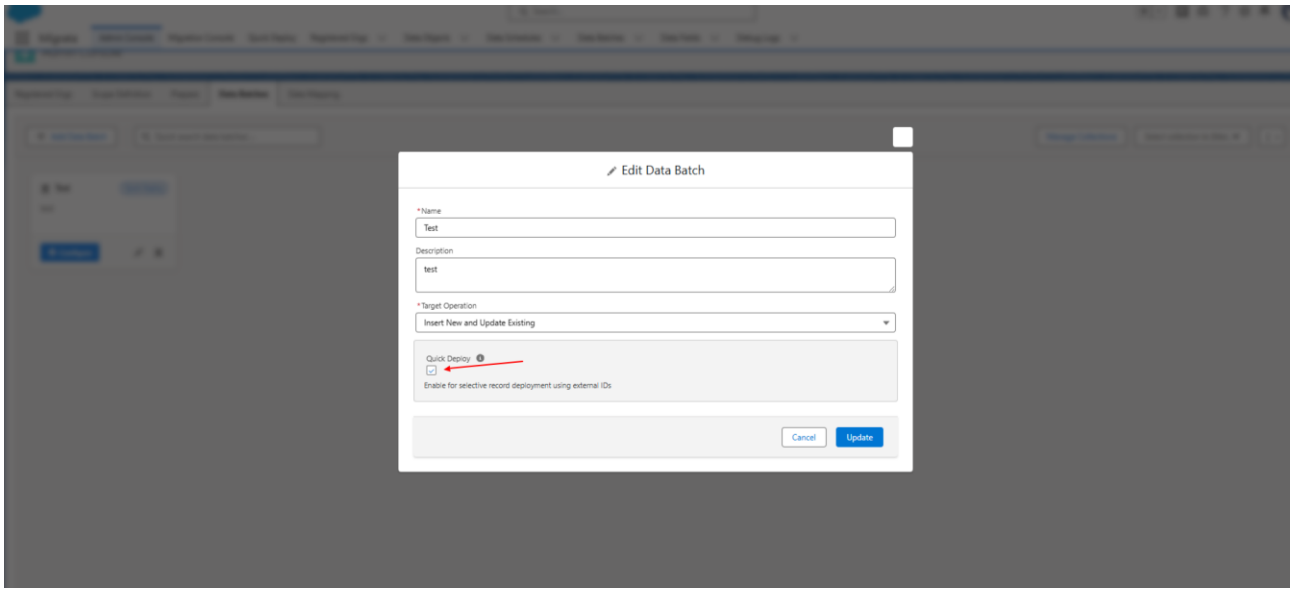

# 17. Quick Deploy

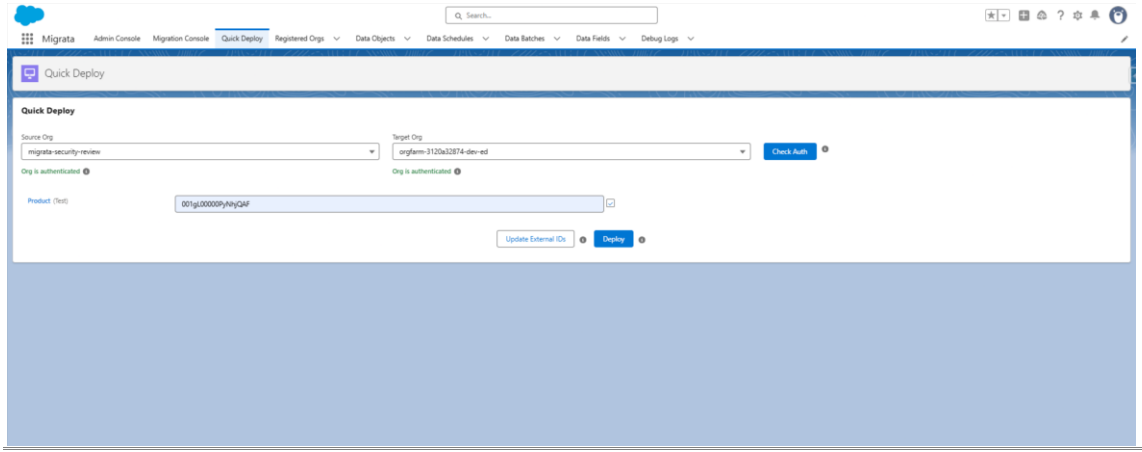
The **Quick Deploy** page provides an accelerated deployment flow for Data Batches that have the **Quick Deploy** flag enabled.

## Using Quick Deploy

1. When creating a Data Batch, check the **Quick Deploy** checkbox
2. Access the **Quick_Deploy** Lightning App page
3. Select the batch and deploy directly using External ID-based filtering

Quick Deploy is useful when you need to push targeted changes without running a full schema comparison.






# 18. Results

If you have come this far, congratulations! You have completed all the steps and learned how to use this application.

## Viewing Migration Results

The one final step is to check if the output is according to your expectations.

1. In the **Migration Console**, select the schedule that was just run
2. Click the **Result** tab
3. Find all the newly migrated data
4. Expand each object result to view the logs

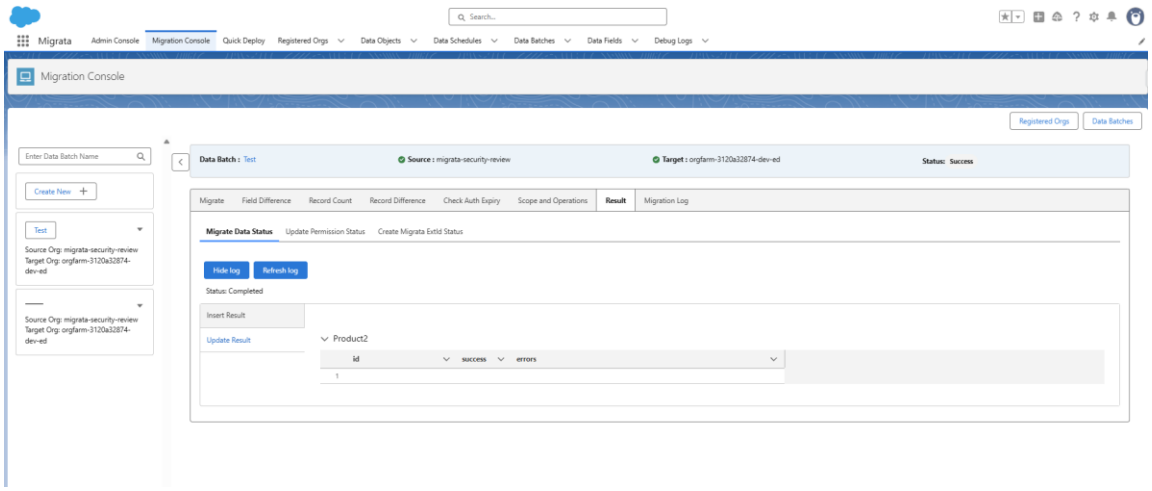
The Result tab shows:

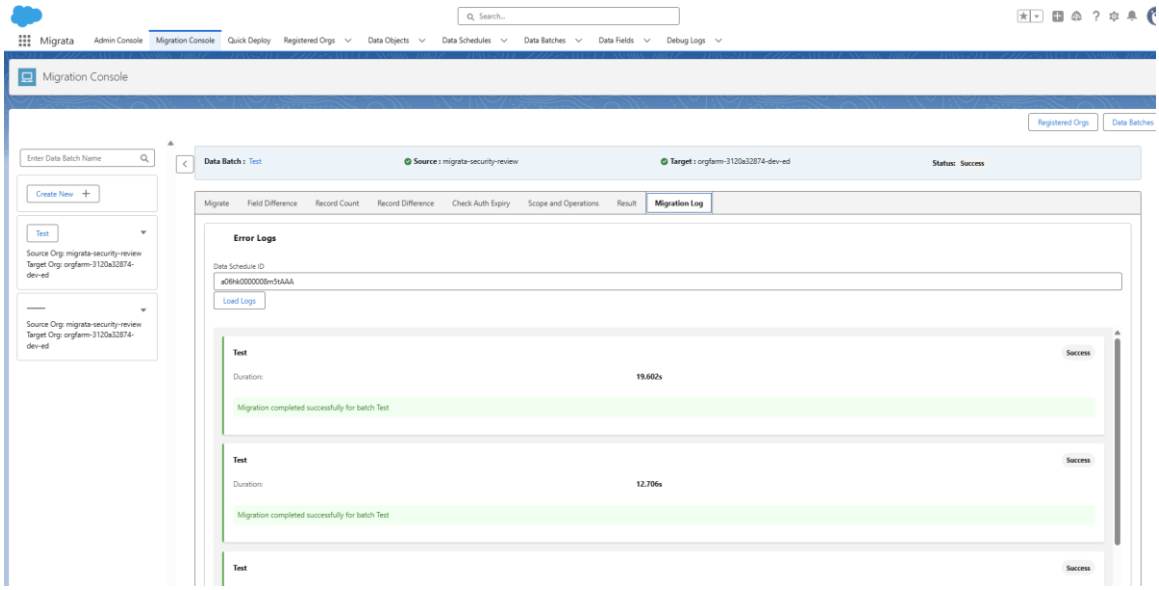
- **Migrate Data Status** — the outcome of the migration
- **Update Permission Status** — permission update results
- **Create Migrate ExtID Status** — Ext ID creation status for Console orgs
- **Check Duplicate Records** — identifies duplicate records post-migration

## Migration Log

The **Migration Log** tab shows server-side error and success logs:

1. Click the **Migration Log** tab
2. The logs load automatically for the selected schedule
3. Each log entry shows:
    - **Batch Name**
    - **Status** badge (Success / Failed)
    - **Duration** (if available)
    - **Message** (shown in green for success, red for errors)
    - **Timestamp**




# Glossary

| Term | Definition |
|---|---|
| **Engine / Console ORG** | The Salesforce org where Migrata is installed and coordinates all operations |
| **Source ORG** | The org data is extracted from |
| **Target ORG** | The org data is loaded into |
| **Data Batch** | A named group of objects to be migrated together |
| **Data Batch Item** | An individual object within a Data Batch, assigned to a hierarchy level |
| **Configure** | The button on each batch card that opens the batch items editor |
| **Batch Collection** | A named grouping of Data Batches for filtering and organization |

| Term | Definition |
|---|---|
| **Data Schedule** | Links a Data Batch to a Source and Target ORG for execution |
| **External ID (Ext ID)** | A unique custom field used to match records between orgs during upsert |
| **Scope Definition** | Configuration defining which objects and fields are included in migration |
| **Prepare Metadata** | Operation that creates DataObject and DataField records from the scope config |
| **Field Difference** | Schema discrepancy between Source and Target orgs |
| **Record Difference** | Record-level discrepancy between Source and Target orgs |
| **Quick Deploy** | Accelerated schema deployment using External IDs; enabled per batch |
| **Audit Fields** | CreatedDate, CreatedById, LastModifiedDate, LastModifiedById — preserved during migration |
| **Re-Auth** | Re-authorize an org when its OAuth token has expired |
| **Deploy Metadata** | Deploys the Migrata integration package into a registered org — includes Apex classes (`TargetOrgMaintenanceApi`, `ObjectFieldsApi`, `RevenueCloudDataHelper`, `MigrataDateInfoBatch`), the `MigrataDateInfo__c` custom object, and the `Migrata_API` permission set. Required on every Source and Target org before running a migration. |
| **Assign Permission** | Assign the Migrata_API permission set to an org's integration user |
| **RLM** | Revenue Lifecycle Management — Salesforce's revenue contracts platform |

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