



Step-by-Step Guide to Migrate Workflow Rules and Process Builders to Flow

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About Industry Dive



Industry Dive, a leading digital B2B media company, has seen explosive growth since we first starting using Sales Cloud in 2012.

Salesforce Environment:

**Sales Cloud
& Marketing
Cloud**

200+ users

**2 Admins &
2 Analysts**

**Operations
system of
record**



Process Builder Migration

Our use case

salesforce

Challenge:

Salesforce announced the retirement of Process Builders and Workflow Rules.

Approach:

- Partner with Dupont Circle Solutions
- Make steady progress
- Be flexible and iterate

Our Roadmap

1. Understand Current State
2. Create Consolidation Plan
3. Migrate to Flows
4. Test the Updates
5. Implement & Monitor Changes

Step 1 - Understand the Current State

Define the work.

In this phase, we...

- **Analyzed** total number of Process Builders and Workflow Rules to be consolidated, by object.
- **Reviewed** all fields referenced.
- **Confirmed** automation timing.

Tips:

- Coordinate with business users to confirm automations are still needed - we learned 25% automations were unnecessary.
- Review all automations before any migration begins.

Organization is Key



Use a master spreadsheet to track all relevant components.

Object	Type	Automation Name	Triggering Criteria	Criteria	Field Updates	Still Relevant?
Account	Process Builder	Account: Set Accounting Type	Account is Created or Edited	1) Name: No Accounting Type and Total Sales > 0 Logic: (1 AND 2) [Account].Accounting_Type_c is NULL [Account] Total_Sales_USD_c > 0	1) Accounting Type = (picklist) Customer 2) 1099 Vendor = True	Yes



Step 2 - Create the Consolidation Plan

Consider availability and change volume.

In this phase, we...

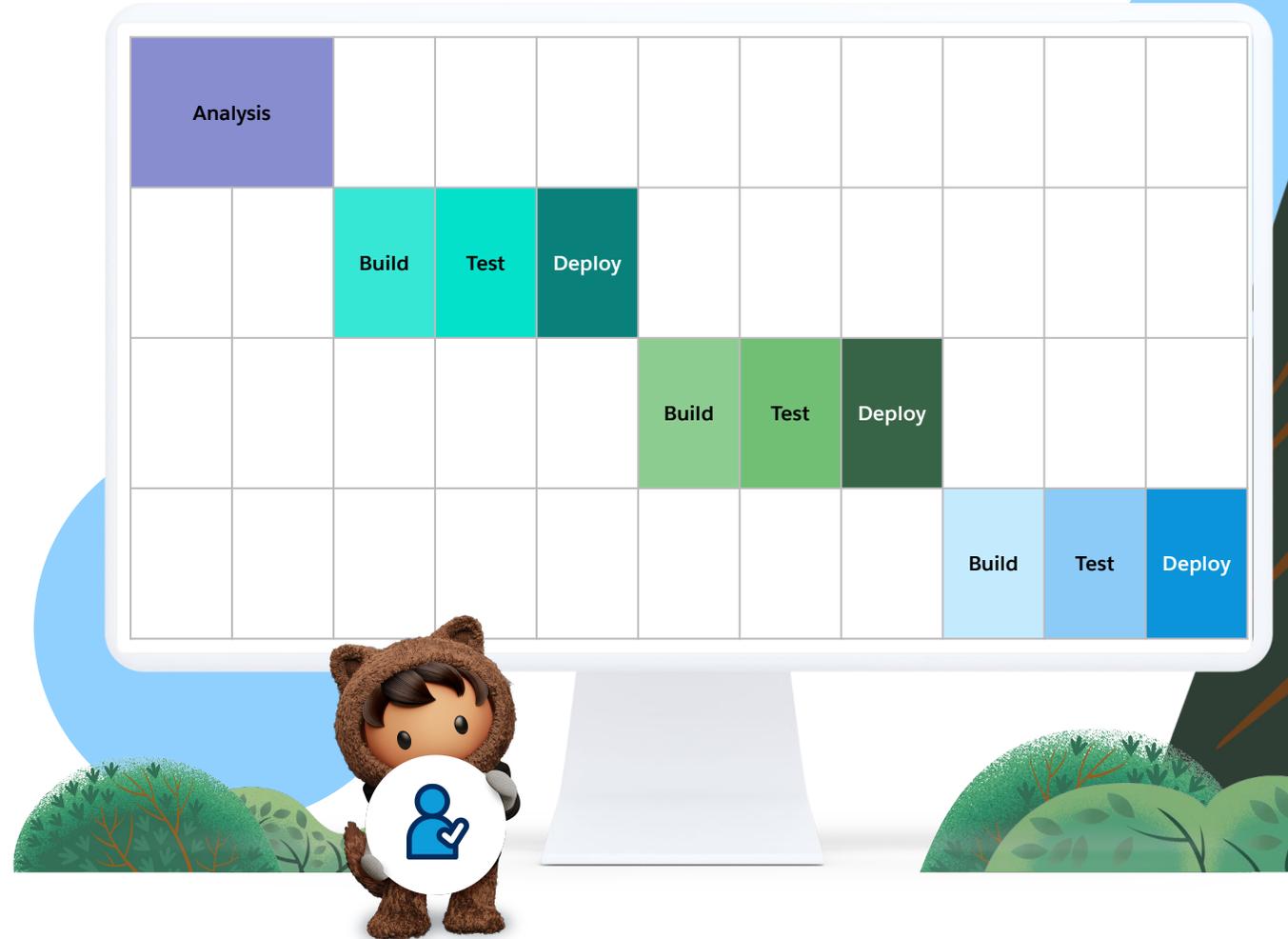
- **Divided** automations into 4 groups by object.
- **Reviewed** existing flows for relevant objects.
- **Piloted the process** with objects with limited automations.
- **Saved** the most complex objects for a later group.

Tips:

- Consider testing time.
- Key objects like Opportunities likely have more complexity, so plan accordingly.

Our Plan

- Migrate 72 Process Builders and Workflow Rules across 17 objects to Flows.
- Divide processes into multiple groups based on objects, complexity, and testing time.
- Utilize an iterative cycle for each group: migrate, test, and deploy.



Step 3 - Migrate to Flows

Time to build your Flows!

In this phase, we...

- **Utilized** the Migrate to Flow tool.
- **Built** one before and one after save flow per object.
- **Merged** changes into existing flows when relevant.

Tips:

- Understand the Flow Builder roadmap.
- Use the Migrate to Flow tool strategically.

Flow Best Practices and Considerations



- **Managed Packages:**
 - Confirm plan for managed package Process Builders & Workflow Rules.
 - Review timing for automation migration.
- **Error Management:**
 - Consider what should happen when the flow hits an error, including who should be notified.
 - Update those fault paths accordingly.
- **Building for Scale:**
 - Avoid hard coding IDs or reference logic in a decision that could change frequently.
 - Revisit or add naming conventions for clarity and accuracy with future updates.



Step 4 - Test the Updates

Put your changes to the test.

In this phase, we...

- **Utilized** a multi-environment strategy.
- **Documented** the test plan, including scenarios and expected results.
- **Executed** testing in multiple phases:
 - Functional Testing
 - Performance Testing
 - End User Validation

Tips:

- Test scripts can be started early.
- Include testing by non-admin profiles and roles.
- Don't forget negative scenarios.

Testing Recommendations

Functional Testing

- Completed in Dev Sandbox.
- Confirm accuracy and review if any behavior changes.
- Include negative scenarios.
- Completed by admin or developer.

Performance Testing

- Completed in Full Sandbox.
- Test bulk scenarios, like dataload inserts.
- Run apex alongside updates to look for conflicts.
- Completed by admin and developer.

End User Validation

- Completed in Full Sandbox.
- Full user acceptance testing recommended for key processes.
- Review of tested records is an alternate option.
- Completed by business users.

Step 5 - Implement & Monitor Changes

Once you deploy to Production, don't forget to monitor the results!

In this phase, we...

- **Created** a deployment checklist for each group.
- **Monitored** progress for 60-90 days.
- **Determined** timing for deleting the old versions

Tips:

- Use Reports & Dashboards to help monitor and flag any new issues.
- Deployment timing is especially critical since the goal is for minimal impact to end users.

Deployment & Monitoring Recommendations

Deployment

- Alert key business stakeholders and power users of deployment timing.
- Leverage your tracking spreadsheet to summarize the status of each group, including:
 - Completed
 - Deployed; Pending Activation
 - Ready for Testing

Monitoring

- Be on call post-deployment to quickly resolve any unexpected issues.
- Keep an eye on any fault path notifications or flow errors via email.

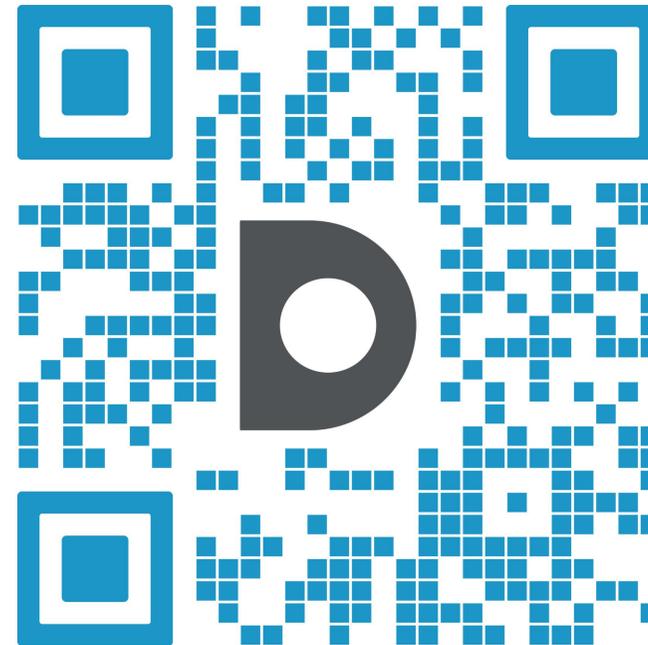
Lessons Learned

Now that we have completed our migration, we've learned...

- *Spread out the work!*
- *Set aside time each week.*
- *Ask all stakeholders about the volume needed for each automation.*
- *Prepare for new requests.*

Download Resources

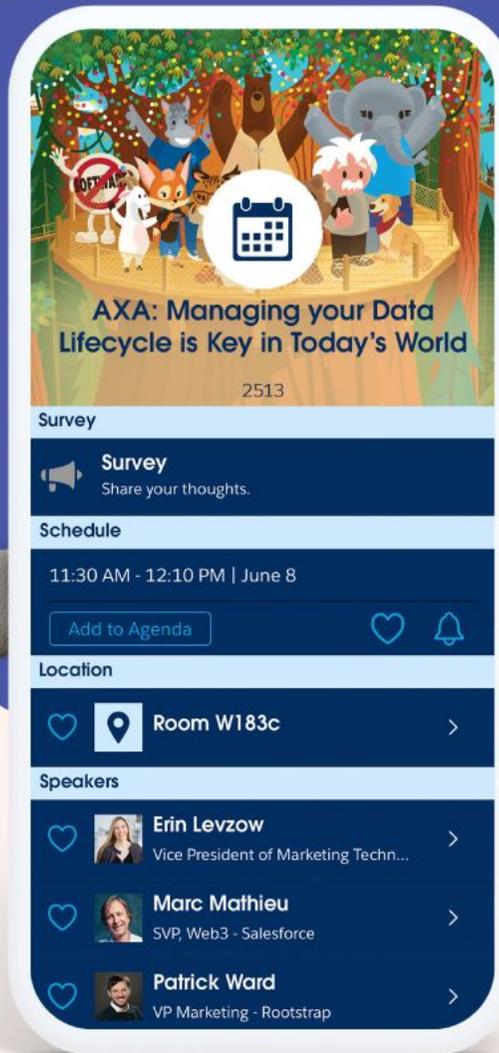
- This PPT Deck
- Flow Trailmix
- Master Spreadsheet Template





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