Migration Checklist

The table below provides a detail view of the scripts that need to be run during Migration:

For customer orgs having huge data sets we need to index the senderId and unformatted mobileNumber field.

Step No	This script helps to	This script should be run because	Do not run this script if	Precaution	Post-run checks
1	Update status of outgoing messages	To show normalized status of an outgoing message.	object has incoming messages. •If there are any active process flow, workflow or triggers which run on update	•Before you run the batch, ensure that there is no active process flow, workflow or trigger running on update of SMS history. •Ensure you are the admin •Ensure that you have access to all the fields and objects (Give permission set) •Ensure that you have disabled Send SMS from the admin portal. •Disable validation rule on SMS History. •Ensure MOC settings are properly done.	none

2	Update direction	To update newly	•SMS history	•Before you run	none
		introduced	object has any	the batch,	
		direction field	incoming	ensure that	
		and set value	messages.	there is no	
		of OUT on	•There are	active process	
		previously	active process	flow, workflow	
		created	flow, workflow	or trigger	
		outgoing	or triggers	running on	
		messages.	which run on	update of SMS	
			update of	history.	
			SMSMagicc	•Ensure you are	
			object	the admin.	
				•Ensure that	
				you have access	
				to all the	
				fields and	
				objects (Give	
				permission	
				set).	
				•Ensure that	
				you've disabled	
				Send SMS from	
				admin portal.	
				•Disable	
				validation rule	
				on SMS History.	

3	Update Unformatted	To update newly	If there are	•Before you run	none
	phone numbers	introduced	any active	the batch,	
		Unformatted	process flow,	ensure that	
		phone field on	workflow or	there is no	
		previously	triggers which	active process	
		created	run on update	flow, workflow	
		outgoing	of SMSMagicc	or trigger	
		messages.	object	running on	
		This field is		update of SMS	
		used for lookup		history.	
		in new logic		•Ensure you are	
		and should be		the admin	
		updated.		•Ensure that	
				you have access	
				to all the	
				fields and	
				objects (Give	
				permission set)	
				•Ensure that	
				you have	
				disabled Send	
				SMS from admin	
				portal	
4	Update Sender id	none	There are few	none	Verify if
			sender ids and		the
			it can be done		sender
			manually		ids have
					correct
					value of
					Used for
					field. If
					not,
					update
					manually.

5	Update Primary object	If you have	If there are	•Before you run	none
	on incoming.	incoming messages in Incoming_SMSc object and you want the old	active process flow, workflow	the batch, ensure that there is no active process flow, workflow or trigger running on update of Incoming_SMSc object •Ensure you are the admin •Ensure that you have access to all the fields and objects (Give permission set) •Ensure that you have disabled Send SMS from admin	
6	Update primary object on inbound messages	If you have incoming messages in SMSMagicc object and you want the old messages to be available in conversations	If there are active process flow, workflow or triggers which run on update of SMSMagic_c object	•Before you run the batch, ensure that there is no active process flow, workflow or trigger running on update of SMS history. •Ensure you are the admin •Ensure that you have access to all the fields and objects (Give permission set) •Ensure that you have disabled Send SMS from admin portal	none

7	Create conversations	If you want the	If there are	•Before you run	none
	on SMS History	old messages to	active process	the batch,	
		be available in	flow, workflow	ensure that	
		conversations	or triggers	there is no	
			which run on	active process	
			update of	flow, workflow	
			SMSMagicc or	or trigger	
			Conversationc	running on	
			object	update of SMS	
				history and	
				Conversationc	
				object.	
				•Ensure you are	
				the admin	
				•Ensure that	
				you have access	
				to all the	
				fields and	
				objects (Give	
				permission set)	
				•Ensure that	
				you have	
				disabled Send	
				SMS from admin	
				portal	

8	Create conversations	if you have	If there are	•Before you run	none
	on Incoming SMS	incoming	active process	the batch,	
		messages in	flow, workflow	ensure that	
		<pre>Incoming_SMSc</pre>	or triggers	there is no	
		object and you	which run on	active process	
		want the old	update of	flow, workflow	
		messages to be	<pre>Incoming_SMSc</pre>	or trigger	
		available in	or	running on	
		conversations	Conversationc	update of	
			object	<pre>Incoming_SMSc</pre>	
				and	
				Conversationc	
				object	
				•Ensure you are	
				the admin	
				•Ensure that	
				you have access	
				to all the	
				fields and	
				objects (Give	
				permission set)	
				•Ensure that	
				you have	
				disabled Send	
				SMS from admin	
				portal	

9	Migrate incoming to	If you want to	•If you don't	•You have no	none
	common object	use a common	have custom	dependency on	Hone
	Common object	object to store		Incoming SMS c	
		both inbound	workflows,	object and all	
		and outbound	reports,	custom	
		messages	buttons or	functionality	
		illessages		has been ported	
			on the	to SMS History	
			Incoming SMS c	-	
			object.	•Before you run	
			•Ensure that	-	
				the batch,	
			there is no	ensure that	
			email	there is no	
			notification	active process	
			etc on new	flow, workflow	
			incoming	or trigger	
			messages	running on	
				update of SMS	
				history and	
				Conversationc	
				object.	
				•Ensure you are	
				the admin	
				•Ensure that	
				you have access	
				to all the	
				fields and	
				objects (Give	
				permission set)	
				•Ensure that	
				you have	
				disabled Send	
				SMS from admin	
				portal	