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.	•If SMS history object has incoming messages. •If there are any 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 the admin portal. •Disable validation rule on SMS History. •Ensure MOC settings are properly done.	none

2	Update direction	To update newly introduced direction field and set value of OUT on previously created outgoing messages.	•SMS history object has any incoming messages. •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've disabled Send SMS from admin portal. •Disable validation rule on SMS History.	none

3	Update Unformatted phone numbers	To update newly introduced Unformatted phone field on previously created outgoing messages. This field is used for lookup in new logic and should be updated.	If there are any 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
4	Update Sender id	none	There are few sender ids and it can be done manually	none	Verify if the sender ids have correct value of **Used for** field. If not, update manually.

5	Update Primary object on incoming.	If you have incoming messages in Incoming_SMS__c 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 Incoming_SMS__c object	•Before you run the batch, ensure that there is no active process flow, workflow or trigger running on update of Incoming_SMS__c 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	none
6	Update primary object on inbound messages	If you have incoming messages in SMSMagic__c 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 on SMS History	If 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 or Conversation__c object	•Before you run the batch, ensure that there is no active process flow, workflow or trigger running on update of SMS history and Conversation__c 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	none

8	Create conversations on Incoming SMS	if you have incoming messages in Incoming_SMS__c 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 Incoming_SMS__c or Conversation__c object	•Before you run the batch, ensure that there is no active process flow, workflow or trigger running on update of Incoming_SMS__c and Conversation__c 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	none

9	Migrate incoming to common object	If you want to use a common object to store both inbound and outbound messages	•If you don’t have custom code, workflows, reports, buttons or configuration on the Incoming_SMS__c object. •Ensure that there is no email notification etc on new incoming messages	•You have no dependency on Incoming_SMS__c object and all custom functionality has been ported to SMS History object. •Before you run the batch, ensure that there is no active process flow, workflow or trigger running on update of SMS history and Conversation__c 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	none