

# Product

This chapter details processes specific to the Product department. There may be some crossover between other departments, too.

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# Migration Process Training

Please review the 13 minute training video in Gong here:

<https://app.gong.io/call?id=8983735014238067423>

This training video is specific to how Migrations is designed in Phase 1. The process is likely going to change dramatically and there are plans to use the Migrations object in Salesforce for a number of situations.

The training video above details:

- How a Migration record is created through automation
- What the fields on the Migration record mean; how they are intended to be used
- How to appropriately move a Migration record through each status (New, Cancelled, Working, Scheduled, Completed)
- List Views of Migrations

The Owner on Migrations is automated at the moment through a custom object called "Round Robin". When a Migration record is created, records from the Round Robin are queried. Individuals a part of the "Migration - Internal" process are found and the person with the lowest count will be assigned to the newly-created Migration record.

# Migration Object

## Introduction

This training video reviews the Migrations object in Salesforce, its intended use, and where you can see Migration records.

Knowing this information is likely useful to most Salesforce users, particularly for:

- CAEs
- CSMs
- Support

Migration records can tell you the Status of a customer's data migration, the type of migration taking place, who is in charge of the migration, and more.

Training Video in Gong: <https://app.gong.io/call?id=7070818315507194264>

# Migration Report and Dashboard Creation Training

This training was held with Kelsee Beck and Brock Cutler when they requested an understanding of how to report on customers that had purchased a migration. Especially, customers migrating from EFCO to Rubex.

While this training is for this particular scenario, this is a very useful training to watch if you need to report on other aspects of the "Migrations" object. It also shows how to take the report and add it to an existing dashboard.

Link to Gong training: <https://app.gong.io/call?id=1221528492914961290>

# Migration Records - Created by Mistake or Critical Information Missing?

Since Migration records are auto-created based off of criteria from a Closed Won Opportunity and its related Order, sometimes, there can be inaccurate information that makes the system think a migration is happening.

However, usually, there is missing information (due to a poor data migration from Zuora), such as the "From Platform" being blank.

There are 3 clues to look at to know whether a migration record was created in error or whether critical information is missing and needs to be added:

1. Check all the Contracts on the Account
  1. Who created the Contract? Was it "Zuora Data Migration" user? If so, there is probably some missing information.
2. Check the Opportunity that triggered the Migration record creation
  1. Did the Sales Rep happen to add a Migration product to the Quote? If so, what is the "From Platform" there?
3. Check the Hub
  1. **Always verify in the Hub whether there is a potential legacy system on the Account**
4. [Optional] Verify with the Sales Rep on the related Opportunity

See this training video for detailed instructions. **Never mark a Migration record as "Cancelled" until you thoroughly investigate and know for certain that the record was created in error.**

Gong Link: <https://app.gong.io/call?id=7554584971494793653>

# Migration Records - How to Create Manually

The ability to manually create Migration records in Salesforce is limited to a few people. If you believe you should have the ability to manually create a migration record, please submit a ticket in #salesforce\_support in Slack.

Migration records should have the following upon create:

- Name
  - [AccountName] - [FromPlatform] --> [ToPlatform]
- From Platform
- To Platform
- Opportunity
- Account
- Order (optional, but highly recommended if it exists)
- Contact (optional)

Please watch this training video as it thoroughly shows how to first, verify if a migration record is needed and second, how to properly create it.

<https://app.gong.io/call?id=1592957490232916457>