

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>

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