

SALESFORCE PROCESS BUILDER RETIREMENT!

Leave it to the professionals

At the end of 2022, Salesforce will be retiring **Workflow Rules** and **Process Builder** automation.



1 What's Happening with Workflow Rules and Process Builder?

While your current Workflow Rules and Process Builders will continue to run, you will not be able to create new automation using these tools. Instead, you will have to create new automation using Flow. Flows have some very important advantages, especially over Process Builders. Flow is more efficient and runs faster than Process Builder. It is far less likely to hit system limits when processing large numbers of records and can do more complex sets of actions across multiple objects. Flow can delete records



2 Migration Risks

Without the **“Translation to Flow”** strategy, you are running a risk of failing successful completion and interrupting your core processes **because of many factors like:**

- **No impact analysis:** no plan B to mitigate potential risks. Important! Create internally or outsource. This is the starting point.
- **No strategy** for deployment and deactivations can cause disruption, duplicate records, or duplicate outbound messaging.
- **No deployment plan:** clear risk of missing the crucial deadline if further issues are discovered or testing is revealing complications due to poor planning without impact analysis.
- **Multi-layer testing:** poor testing can result from process interruption in the live environment.
- **No roll-back strategy:** can cause time delays and potential process interruption caused by manual removals of failed deployments.

Not all processes will be translated automatically by the Salesforce migration tool due to the complexity of some of your processes. Flows have more ways to be triggered than the two basic ways in process builder (Record creation, record update).

Low-skilled technical team can fail to complete all translation requirements successfully Time factor:

Allow time for planning and execution
(*Impact analysis > planning > development in sandbox > testing in sandbox > metadata backup > rollback strategy > deployment > production testing > removing unused configurations*)

To mitigate any risks, you should:

1. Create Impact analysis (Internally or outsource)
 - a) Categorise processes by complexity
 - b) List out all risks
 - c) Provide a full report for reference



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3 Have Clear Strategy to Manage the Risks

Once you understand the risks involved in the migration effort, you can now create a strategy for success. If the impact analysis resulted in low risk level output, you can do the migration in-house with your own team.

If the risks identified are medium or high, you should have a strategy in place on how to approach the translation of more complex processes to Flows, so your business is not impacted or interrupted.

A high-Level strategy can look something like:

1. Create a migration strategy based on the impact analysis
2. Have a backup plan
3. Have a roll-back plan
4. Development (Translation to Flows)
5. Thorough UAT!
6. Deployment
7. Production testing



4 What Will be the Effort?

Depending on the complexity of your processes and the number of integrations, the migration of technically complicated processes can take even several months with proper testing. This in itself should be treated as a small project with proper UAT and deployment plans with timing to ensure that the business will not be interrupted either by not meeting the deadline for the migration or technical issues.

Smplicity specialising on providing the full Impact Analysis reports that will list out the risks, complexity, and possible estimates of the work involved.

To successfully engage with businesses, we have created a process to manage the migration for our clients.



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