

● FOR THE ADMIN TEAM AND THE REVIEWER

Old automation checklist

Process Builder and Workflow Rules to Flow. Support ended on 31 Dec 2025 and active ones still run. Tick a box only when its pass line is true. Each Ask line is a question you can type into Clientell AI, or answer by hand in Setup.

ORG	REVIEWER	DATE	SANDBOX OR PRODUCTION
1 COUNT			Guide step 1
☐ Active workflow rules and processes counted Pass: the Setup list count matches the query count, for both tools. Ask: list every active process and workflow rule, with its object			
☐ Flows already on each object counted Pass: before-save and after-save flows per object are on the sheet. Ask: list active record-triggered flows by object and trigger type			
2 CATALOG			Guide step 2
☐ Cataloged by object Pass: each item has a category, entry criteria, related actions, an owner. Ask: for each object, list what runs and what it changes			
☐ Still needed, yes or no Pass: every "no" has a one-line reason an auditor could read. Ask: which items were last changed more than two years ago			
3 RANK			Guide step 3
☐ Risk level on every item Pass: low, medium or high, using the guide's table. Ask: which items create tasks or update related records			
☐ First object chosen Pass: fewest items, mostly low risk, and the reason is one sentence. Ask: count old automation per object, fewest first			
4 MIGRATE IN A SANDBOX			Guide steps 4 and 5
☐ Each item marked tool, partly or by hand Pass: marks follow Salesforce's limits list, not a guess. Ask: which items have criteria on a related-object field			
☐ Migrated in the sandbox, in the same org Pass: new flows exist in the sandbox. Nothing is rebuilt by hand in production. Ask: list flows created or changed in the sandbox this week			



5 TEST

Guide step 6

- ☐ **Old and new compared on the same records**
Pass: every row matches, or the difference is a signed decision.
Ask: [list the fields each flow changes](#)

- ☐ **Tested with Apex triggers and other flows on**
Pass: same result with everything active on the object.
Ask: [list Apex triggers and flows on this object](#)

6 SWITCH OVER

Guide steps 7 and 8

- ☐ **Flows ordered on the object**
Pass: each active flow has its own trigger order, spaced 10, 20, 30.
Ask: [list active flows on the object with trigger order](#)
- ☐ **One pair switched at a time**
Pass: flow active, old item deactivated (not deleted), one line logged.
Ask: [list deactivated processes and rules, with the date](#)
- ☐ **The way back is written down**
Pass: how to switch the old item back on, and who holds the permissions.
Ask: [who holds Manage Flow, View All Data and Customize Application](#)

7 WATCH

Guide step 9

- ☐ **Fault paths send an email to a named person**
Pass: a forced failure in the sandbox produced an email.
Ask: [list flows with no fault path](#)
- ☐ **Entry conditions set, first week reviewed**
Pass: no flow runs on every save. A named person reads failures.
Ask: [list flows with no entry conditions](#)

HAND-WORK LIST: ITEMS MIGRATE TO FLOW COULD NOT TAKE, AND WHO BUILDS EACH

ADMIN LEAD SIGNATURE

SECOND REVIEWER

DATE

Count first. Connect a sandbox or production org and Clientell AI lists and maps the old automation it finds. 14 days free, no card: app.clientell.ai/signup