



Help Desk Migration

A GENERAL DATA MIGRATION CHECKLIST



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BEFORE INITIATING HELP DESK MIGRATION

Data migration might be easier than you think, but preparation needs to be done. We strongly recommend you answer the following questions before data migration:

1. When should my support team start working on a target help desk system?
2. What data do I want to transfer?
3. Do you need to change your records, or can they be left as they are? For example, you could migrate all tickets into one group or transfer ticket events as private notes, etc.

Expert tip: Tickets and related data migrate similarly during the Demo Migration and Full Data Migration. So, if some records didn't migrate or/and transfer incorrectly during the Demo Migration, they won't move during the Full Data Migration.

Download the Demo reports for migrated/failed/skipped records and check if everything migrated correctly. If any issues appear, contact our support team.

6-STAGE DATA MIGRATION PLAN

DATA MIGRATION PLAN + DELTA MIGRATION*

*This flow works with the Signature support package because Delta migration is available only in this support offering.





Expert tip: Be sure to accomplish Steps 4, 5, and 6 during 30-60 minutes and outside working hours. Let's say you run the Full Data Migration on Monday after work hours. So your support team finishes working on the Source on Monday and starts working on the Target on Tuesday morning.

DATA MIGRATION PLAN WITHOUT DELTA MIGRATION



Expert tip: This data transfer plan works for those support teams who don't need to work with the Source during the Full Data Migration.

Setting up a Free Demo Migration

1. PICK UP A DATE

When planning your data migration, consider the following aspects:



- The volume of help desk-related workload: Select the day when your support reps got minimum (or no) interaction with customers and support data. This way, help desk data transfer would be faster and exclude process interruptions.

If you need to use the Source during help desk migration, choose the Signature support plan with [Delta Migration](#).

- Preparation: You need to plan your Source and Target preparation time. Be sure to have enough time to clean up records, identify what data you need to move, learn the records types and how they can be mapped between current and future help desks, and back up.

2. KEEP YOUR TEAM UPDATED

Talk to your support team and stakeholders about the data migration plan. If you need help setting up current and destination platforms, share relevant tips and migration checklists. For example, it can be anything: data filtering, closing old tickets, or examining the customer data after the Full Data Migration.

Start onboarding your support team to your new help desk system immediately. This will ensure they get the ball rolling after the help desk switch.

Expert tip: Send an email or a reminder to your team [before the data migration](#).

3. CLEAN UP YOUR RECORDS ON THE SOURCE HELP DESK

- [Audit the data on your current help desk platform](#). Be sure to double-check your customer service data on duplicates or empty fields.
- Also, inspect your source data for damaged or broken records. Then, decide whether to merge, complete, or delete them.

The Full Data Migration price depends on the number of records you want to move. So, data auditing can help you a) cut down on the migration cost and b) avoid dragging the messed records to the new help desk.

4. PREPARE YOUR TARGET HELP DESK PLATFORM

The target-related work often depends on the help desk system you're migrating to. Note that some help desk software has specific requirements and limitations.

Before the Demo Migration, be sure to check these data migration checklists: [Specialized Data Import Checklists](#)



4.1 FIND ACCESS CREDENTIALS TO CURRENT AND DESTINATION

To connect your Source and Target to the Migration Wizard, you need to provide the required access credentials. Note that this information varies depending on the help desk platforms.

Required access credentials can be API key, API Token, email address, password, URL, etc. Or you just need to sign in with your help desk account.

Access credentials like API keys, API Tokens, and REST API are temporary. That's why you need to run the migration before they expire. Some help desks have pre-built API keys, while others require you to generate one. Do not re-fresh API keys during the Demo or Full Data Migration because your migration will fail.

We strongly recommend finding access credentials before setting up your help desk migration. Check out our Knowledge Base sections with data transfer checklists to collect the required access credentials to your Source and Target.

4.2 TURN OFF NOTIFICATIONS OR/AND AUTOMATIONS

If you [turn off triggers and notifications](#) before starting your records transfer, you won't get interrupted during the data migration.

For some platforms, you need to disable email notifications, Observer rules, and triggers. Usually, you can pause notifications, triggers, etc. in the Settings or Automation section. But don't forget to switch them on your Target after data migration is complete.

Look for detailed data migration checklists for your Source and Target in our Knowledge Base.

4.3 DO THE SPECIFIC PREPARATION FOR YOUR SOURCE AND TARGET PLATFORMS

Some platforms require a specific setup so that data migration runs smoothly. For instance:

- Switch off the Phone Duplication rule when migrating to Salesforce Service Cloud
- Create agent profiles in Teamwork Desk when importing data
- Create a custom view in Freshservice when exporting data

On the Source and Target connection steps, you will see if any specific preparations are required. However, we recommend you prepare before the Demo.

Before the Demo, run through migration checklists for your Source and Target.



5. RUN FREE DEMO MIGRATION

[The Free Demo](#) helps you see how the data migration is done and whether you need to do legwork on your Source or want to customize the migration process to your specific needs.

Before setting up your Demo, check if your account has admin rights on current and destination help desk instances. The Demo Migration flow has 7 steps:

1. Sign in/Sign up to your Migration Wizard account.
2. Connect your Source and Target help desks.
3. Choose the records you want to move.
4. Match [agents and groups](#)*.
5. Map ticket and articles routes.
6. Choose [automated options](#)*.
7. Start your Free Demo Migration.

*Some steps vary depending on the Source and Target. Contact our support team for more details on your help desk migration pair.

6. CHECK YOUR DEMO MIGRATION RESULTS

Once your Demo Migration is done, you'll see a table with the records count:

- all available records (for migration)
- migrated records
- failed records
- skipped records

Be sure to download reports to evaluate the Demo results. The skipped records report includes the reasons why this data wasn't transferred. Contact our support team for more details on failed records.

After the Demo, you get the Full Data Migration price with a detailed price breakdown. Here, you can also select the most suitable [support package](#) to enhance your migration experience.

WHAT IS CUSTOMIZATION?

Help Desk Migration tech team can tailor your data switch as you want it. For example, you want to move specific records, filter historical data before migration, match pre-existing records on your Target, or migrate a specific record to another field (on the condition it matches the required input data type).

Before [requesting data customization](#), launch your Demo to find out what the Migration Wizard covers automatically. If you have specific requests, submit a ticket or start a live chat with our support team to discuss your needs.

Do you still have questions? Browse our guide to the [common questions about data migration](#).

LIST OF RECOMMENDED CUSTOMIZATIONS

We strongly recommend requesting such customizations for your Target platform:

- Filter help desk data by different criteria (i.e., creation date, tags, custom fields, groups, organizations, assignees)
- Change the default migration process (i.e., migrate change and problem objects as tickets, ticket events as private notes, and the information related to inactive users)
- Migrate the information from the integrations (i.e., migrate linked Jira task ID or URL)
- Add information to the migrated data (i.e., mark tickets with extra tags, add legacy ticket ID to the ticket subject)
- Migrate emails of CC users into a text or multi-line custom field, or private comment, or the first private note
- Migrate Account and Contact custom fields
- Migrate additional phone numbers or emails for contacts

FREQUENTLY ASKED QUESTIONS

I CAN'T TURN OFF NOTIFICATIONS AND/OR AUTOMATIONS. WHAT SHOULD I DO?

There's a workaround for those situations when you can't [turn off automation](#).

- Request a support team to add a tag to all migrated tickets.
- Choose "Add a new tag to the migrated tickets" if such an automated option is available for your help desk on the mapping step.

After that, you have to set up specific rules for notifications and automations so they don't trigger on the tickets with the added tag.

WHAT DATA MIGRATES IN A DEFAULT MIGRATION?

Migration Wizard imports 20 tickets with related data (i.e., comments, attachments, tags, custom fields, inline images, public and private notes, etc.) and 20 articles to your target platform during [Demo Migration](#). Other available records for the transfer depend on your Source and Target.

To check what records you can migrate, follow this guide:

1. Go to the [Supported platforms](#).
2. Choose your Source and Target help desks.
3. Scroll down the record block enlisting data available for this migration pair.

Expert tip: If you want to move data unavailable in a default help desk migration, [request Custom Data Migration](#).

HOW MUCH TIME WILL THE FULL DATA MIGRATION TAKE?

There's a set of reasons that impact [how long will the Full Data Migration take](#):

1. Total number of records you want to transfer
2. Number and size of attachments
3. API limits of the Source and Target help desks
4. Specifications of the API
5. Your Target help desk system

Data migration includes retrieving (reading) all records from the Source help desk and transferring (writing) them to the Target help desk. So the speed of records migration also depends on how the APIs are built and what API limits offer your help desk vendor.

Some help desk platforms let fetching a ticket with all comments using just one API request. Others need to send separate requests to fetch each record – one request fetches a ticket, and another fetches its attachment. So, you also need to know how many API requests:

1. your Source platform uses to fetch and count per one record
2. your Target platform uses to search and create per one record

To count how much time your Full Data Migration will take, you need to:

- inspect how many API calls your source and target platforms allow per minute
- calculate how many API calls you should have to migrate a specific type of record
- count how many API calls you need to have on the source and target solutions to migrate all records

Expert tip: Request your Target help desk vendor to increase your API limits temporarily to speed up your records switch.



WHAT IS DELTA MIGRATION? DO I NEED IT?

Delta migration allows your support team to keep working with your current help desk during data migration: your customer service has no hiccups and works as usual. At the same time, the data on the destination platform will be clean without any extra manipulations.

During [Delta migration](#), the Migrations Wizard only moves new data or/and updated tickets and articles created during the Full Data Migration on your source help desk system.

Note: Delta migration is available only in the [Signature plan](#) of our support service offerings. You can choose your support plan using the Demo Complete step.



WHY MIGRATING WITH US



It's much quicker compared to transferring your records on your own

Take advantage of the rapid transferring process due to the full automation of the Migration Wizard software and the chance to instantly initiate the full data migration if you're transferring records between the backed platforms.



Your data continues to be safe and sound throughout the moving process

Move your records around a safe connection and benefit from a regularly updated privacy policy that assures the security of your data both during and after the migration procedure.



The customers of our service appreciate and approve of it

Join thousands of happy customers who transmitted their data with the Help Desk Migration service and helped it attain a reputation and earn various customer service-related rewards.



Broad mapping opportunities will assist you to retain your records connected

Benefit from an opportunity to map both standard and custom fields while determining the route of your data and, thus, adjust the migration of your records according to your individual wishes and sustain the relationships between your data.



You can schedule the most convenient time for your data transfer

Migrate your entities at the most suitable time by booking your data migration for the time that will work best for your team and your customers.



You can rely on the expert and assisting support team

Obtain the assistance of a team of data transfer specialists who have years of record-moving experience behind their shoulders, and you will be happy to help you out through the whole transfer process at any time (even on weekends).



Help-Desk-Migration.com

contact@help-desk-migration.com

LOOKING FOR MORE DATA MIGRATION DETAILS?

Let's talk now

