



Help Desk Migration

ZENDESK DATA MIGRATION CHECKLIST



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Zendesk migration can be done successfully. Over the years of experience, we've discovered the perfect combination to make the process as smooth and painless as possible.

There are a few to go: the first one is a detailed checklist covering everything from A to Z. The second is a reliable third-party service that takes the heavyweight of data transfer upon its shoulders. The best thing about Help Desk Migration is a user-friendly interface, so no need for data migration expertise.

If you're here, you may have already set up your mind to migrate to Zendesk, and most likely, you did some research. However, before diving into all the data migration-related details, we find it essential to inform you about the list of entities that can not be migrated to the new platform. They are:

- Inline images
- Links between knowledge base articles (here's an [explanation](#) why)

A standard automated migration doesn't support these options, but we offer an opportunity for customized migration. [Contact](#) our team to discuss the details of setting and launching your personalized transfer.

Note: When importing your Knowledge base into Zendesk, its dates will change from the original ones to the dates of data migration itself.

BEFORE YOU SET UP THE MIGRATION

Quick fact: about *60% of efforts during the data migration process* goes to preparation and planning. You have to spend a decent amount of time during this phase, but the results will pay off. That's why this checklist covers nearly every detail to make sure you're fully prepared for the migration.

1. BUILD A MIGRATION STRATEGY TO FIT YOUR SITUATION

There are two ways you can approach your migration:

1. You can migrate all data at once (Big Bang Migration)
2. migrate sets of data (Trickle Migration)

From our experience, **Big Bang Migration** is easier to handle. It allows your team to keep working in the source system until you have all the data in Zendesk and are ready to make the switch.

Ultimately, all that will be left to do is a [delta migration](#) to transfer the new tickets created during the migration.



Even though **Trickle Migration** sounds easier, it comes with a lot of hassle and can interfere with the help desk-connected workload.

2. INFORM YOUR TEAM

Be quite diligent in keeping your agents up to date about the big transfer date. Ensure you created a transparent workflow and give enough knowledge and time to start *closing tickets for migration*. If said in advance, your support agents will also try to get used to Zendesk, so the transition will not affect the working process.

Plus, it would be a good idea to *distribute specific responsibilities* among several responsible employees. For example, right after the migration, each agent can check all the tickets specifically assigned to them. So you check the accuracy and speed up the examination.

Ensure you *inform* both your CEO and customer support reps (everyone impacted by the transfer directly). No need to report every step along the way, but keeping them up-to-date about the process would be helpful. Moreover, some recommendations from their point might be quite efficient during the preparation stage.

A tip from Help Desk Migration: Remind your employees about the migration a day before to prevent any accidental work on tickets in your old helpdesk. Send an email with a reminder or create a calendar event.

3. DO A BIT OF CLEANING UP

If you move all records as they are, you will end up with piles of unused historical data in Zendesk. Consider going through most entities and deciding what you want to keep and what can be deleted. It will save you much-needed space for new incoming tickets and reduces the migration time.

HDM Service charges per migrated record. This is how spam cleaning can reduce your final check (and who doesn't want that?) The result to strive for is the data you feel 100% comfortable moving to Zendesk.

A tip from Help Desk Migration: Ask your agents, who deal with these records every day to separate the essential ones. They certainly know what can be left out, especially when it comes to duplicates, invalid emails, or unassigned ticket conversations.

Don't have time or human resources to look through your data? Our migration tool can perform simple filtering and omit certain data. [Drop us a line](#) before setting up your migration and tell us the criteria you want your data to filter.

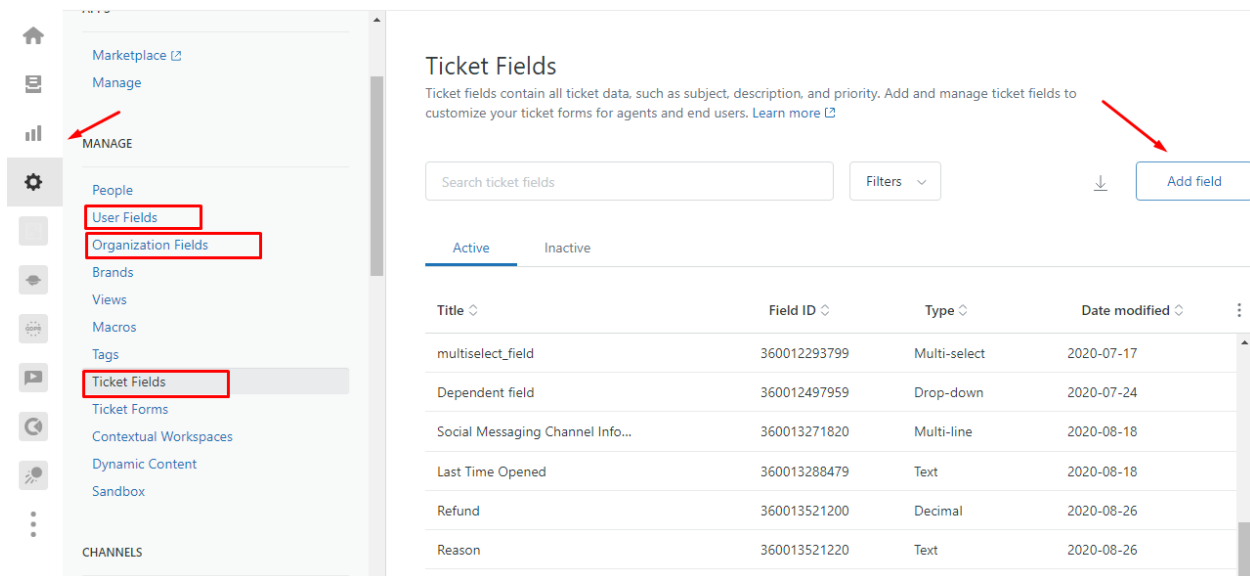


4. PREPARE ZENDESK FOR MIGRATION

Before setting up the migration, prepare Zendesk to be ready to accept the data. Pay attention to these steps:

1. Create custom fields with a matching 'type'. It enhances the mapping and allocation of the records after the migration. Zendesk is flexible in custom fields and allows customers to create custom fields for tickets, users, and organizations.

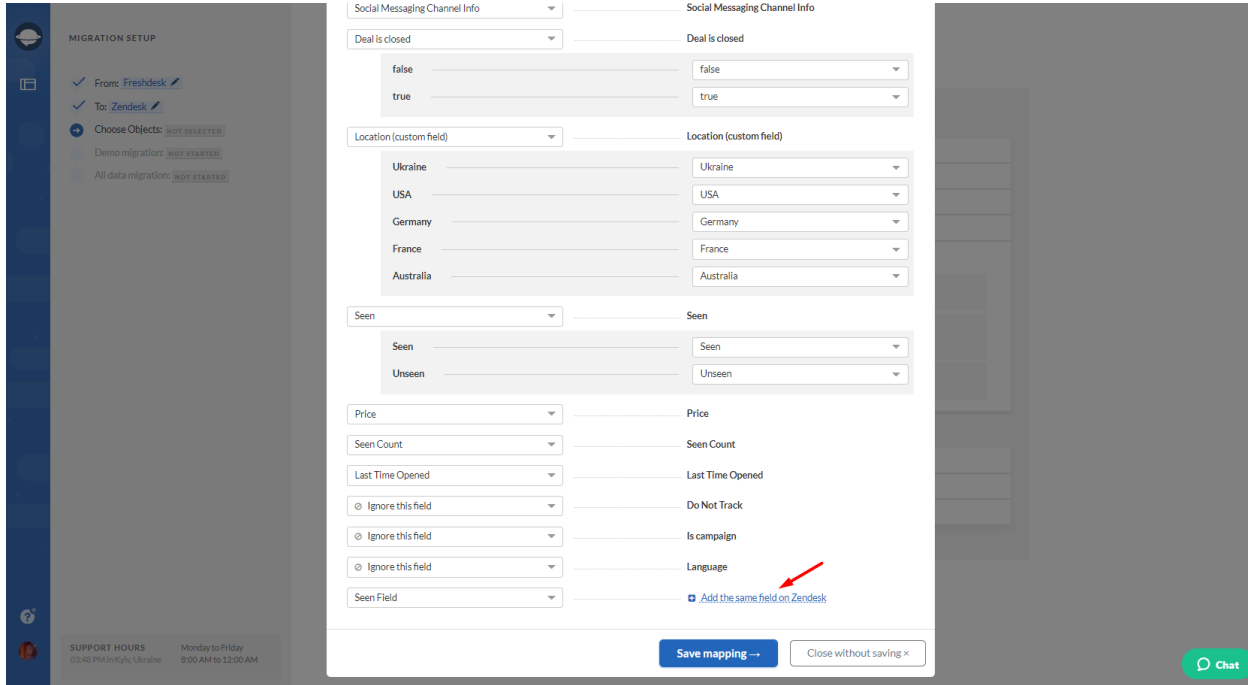
There are two ways you can create custom ticket fields. First is right in your Zendesk. To create custom fields, go to Admin → Manage → Choose User/Organization/Ticket fields → Click Add field.



The screenshot displays the Zendesk Admin interface for managing ticket fields. The left sidebar shows the navigation menu with 'MANAGE' and 'Ticket Fields' highlighted. The main content area shows the 'Ticket Fields' management page. A search bar and a filter dropdown are visible at the top. Below the search bar, there are tabs for 'Active' and 'Inactive'. A table lists existing ticket fields with columns for Title, Field ID, Type, and Date modified. A red arrow points to the 'Add field' button in the top right corner.

Title	Field ID	Type	Date modified
multiselect_field	360012293799	Multi-select	2020-07-17
Dependent field	360012497959	Drop-down	2020-07-24
Social Messaging Channel Info...	360013271820	Multi-line	2020-08-18
Last Time Opened	360013288479	Text	2020-08-18
Refund	360013521200	Decimal	2020-08-26
Reason	360013521220	Text	2020-08-26

Or you create custom fields in Migration Wizard when you're setting up the migration.



Select the source field you want to map and click “Add the same field in Zendesk.’ Wait for a few seconds while the Wizard creates the field. Once the field is created, you will be able to map its values.

The custom fields should:

- either have a default setting or
- or be mapped as 'Unrequired'

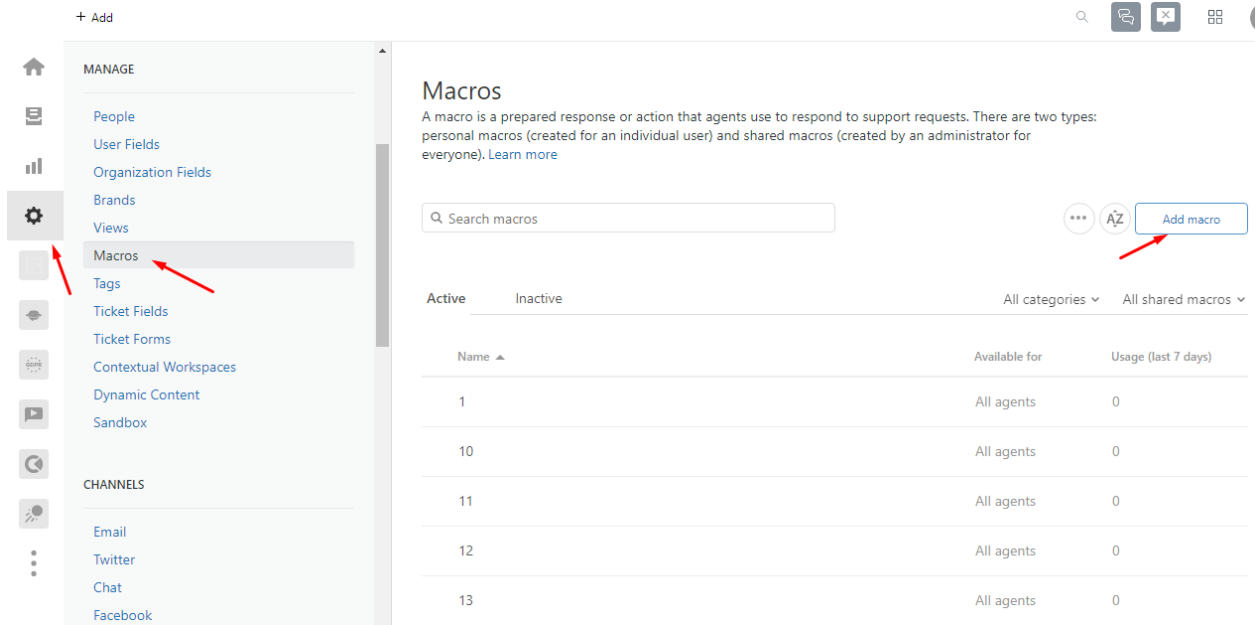
Otherwise, the field will remain empty.

As for Contact and Organization custom fields. You cannot map them on the Migration Wizard. However, you can talk to our team and get a custom mapping of these types of fields.

2. Setup saved replies (macros). Just as you did with your data, assess which macros you may need in Zendesk. Maybe something is not relevant anymore. However, shared macros (created for everyone on the team to use) are better to keep.

To create macros in Zendesk, go to Admin → Macros → Add Macro.





3. Agent profiles. You don't need to set them up as Migration Wizard will do this during the migration.

The Wizard will use the slots available in your account, so you don't have to worry about being charged for extra agents. If you have some retired agents in the source system, the Wizard will reassign them to a default agent (usually the user initiating the migration).

5. STUDY THE PECULIARITIES

Zendesk is one of the most popular help desks out there, and it's a choice of many businesses for data import. Still, you have to pay attention to its peculiarities and limitations:

1. When migrating to Zendesk, your *suspended Contacts will change their status to unsuspended*. The reason for this is that suspended Contacts cannot be the requesters of tickets in Zendesk.
2. You cannot migrate tickets without contacts, organizations, agents since everything is interconnected. *These fields should be filled in.*
3. After 28 days, tickets that were marked as 'Solved' will automatically get updated to 'Closed'. And after 120 days of being 'Closed', tickets are automatically archived. It happens because of certain automation settings. *You can reduce the number of days until they become 'Closed', but you can't expect tickets to stay 'Solved' until you manually close them.*
4. By default, *Zendesk does not show all ticket statuses in the main menu*. To view all tickets, type * in the search bar and press the *Enter* key. This is the only way you can locate archived tickets.



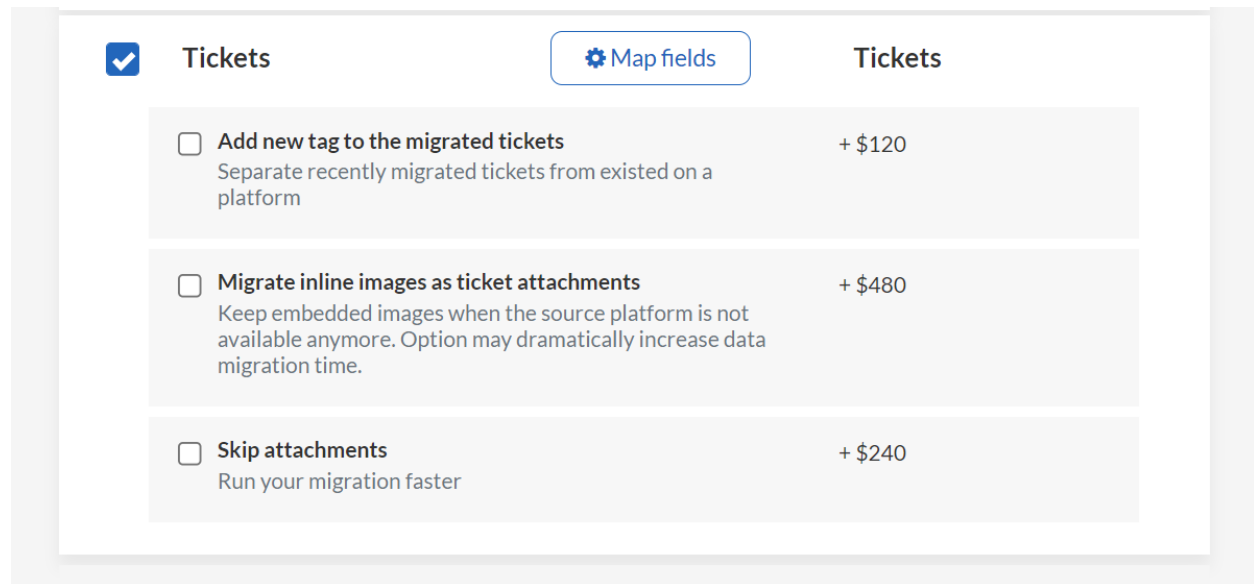
5. The tickets will have relevant tags assigned automatically by Zendesk based on the custom field options.
6. Only *default language* migrates by default.
7. The agent roles you see on Zendesk, depending on your subscription plan. For example, there is an administrator role that defines everything in your account. Or, a light agent role that can leave private comments to tickets, but cannot be a closed ticket owner, etc. If you are an Enterprise plan user, make sure all of your agents receive the Staff role to solve the tickets.
8. Each subscription plan has a limited amount of agents. If you want to preserve the same number of agents you had on your source help desk, consider upgrading. If you don't migrate certain agents to Zendesk, [contact our team](#) to reassign their tickets.
9. Tickets without the agent will get assigned to a default agent in Zendesk. There are two options to fix it: a) make sure all your tickets have an assignee, and b) [reach out to us](#) and configure a default agent.
10. *You cannot store Knowledge Base Articles in categories, only in folders.* If you had no folders on the source help desk, the articles would migrate to a default folder created automatically by the migration tool. While it seems a bummer at first, the consequences of spending a lot of time locating appropriate articles might be even harder to bear. Also, make sure that Zendesk Guide is activated.
11. If you want to migrate articles to a certain brand, *connect its link to Zendesk first.*
12. By default, *Zendesk is configured to block unsafe HTML tags and attributes*, to ensure that your customers can safely browse your knowledge base. For example, videos migrated as a part of Knowledge Base articles are referred to as unsafe content. To display them, go to *Settings>Guide Settings, find Security, and check the Display unsafe content option.*
13. There are several types of tickets, which *migrate differently.* Merged tickets migrate as separate ones, together with private messages. Follow-ups migrate as one ticket. In the custom migration, you can transfer follow-ups that contain ID into a custom field or private note.
14. The tickets CC field is not transferred but all the other people's replies are reflected on the ticket.
15. The order of tickets during migration depends on your source help desk API/ It controls the process and determines whether new or old tickets will be migrated first. *Our service migrates the users and then tickets*, to maintain the user-ticket relation.



6. CUSTOMIZE YOUR MIGRATION

We can customize your migration to meet your needs precisely. You can also choose from out-of-the-box custom options like:

- ticket tagging
- migrating inline images
- skipping attachments



The screenshot shows a configuration panel for 'Tickets' migration. At the top left, there is a checked checkbox and the label 'Tickets'. To the right is a 'Map fields' button with a gear icon. The main area contains three rows of options, each with an unchecked checkbox, a description, and a price:

Option	Price
<input type="checkbox"/> Add new tag to the migrated tickets Separate recently migrated tickets from existed on a platform	+\$120
<input type="checkbox"/> Migrate inline images as ticket attachments Keep embedded images when the source platform is not available anymore. Option may dramatically increase data migration time.	+\$480
<input type="checkbox"/> Skip attachments Run your migration faster	+\$240

When migrating to Zendesk, you can add tags to identify the migrated data. You can also migrate inline images as attachments. Note that this option can take longer to migrate data. And, finally, To speed up data migration, you can skip attachments.

If you need more specific custom work done, don't hesitate to contact our team.

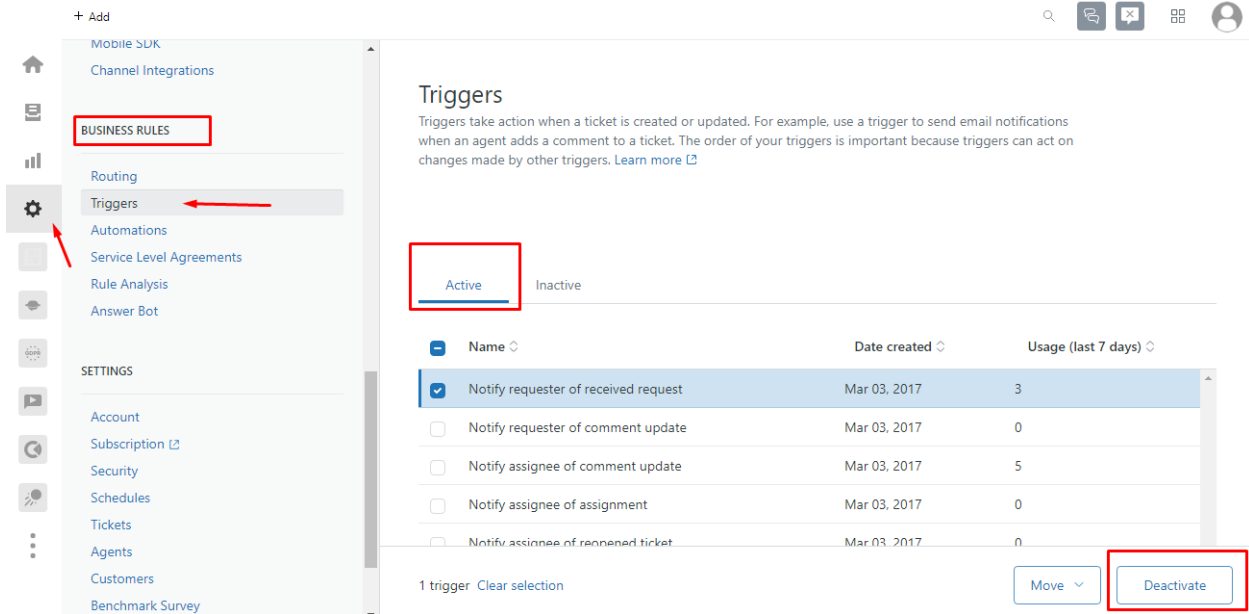
YOU'RE ALMOST READY

1. TURN OFF TRIGGERS AND AUTOMATIONS

Why should you do this? Notifications can lead to data changes and unwanted notifications. That's why it is better to turn them off.

To do so, go to Admin → Business Rules → Triggers → click on a Trigger and choose Deactivate.

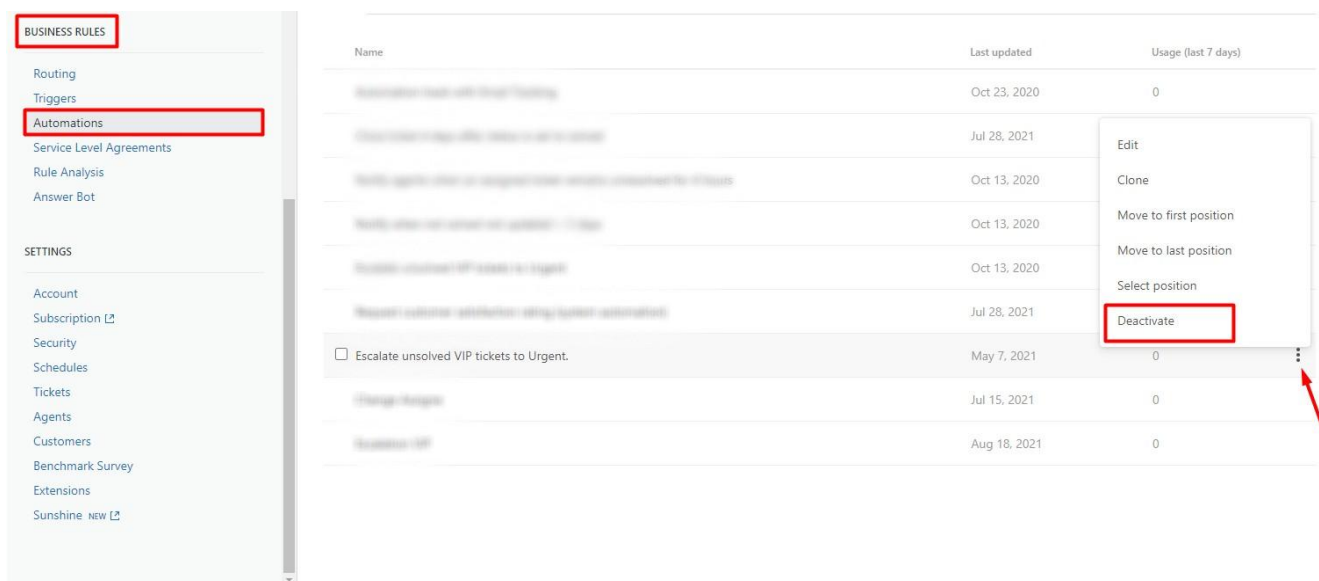




To make sure that Zendesk doesn't change the imported data during the migration, disable the automations.

Go to Admin→Business Rules→Automations→Hover over the automation you want to deactivate→Click the three dots and then "Deactivate."

Go through each automation and deactivate it.



2. RUN A DEMO

Instead of jumping right into Full Data Migration, we offer a [Free Demo Migration](#). During this process, the [Wizard](#) will transfer 20 random tickets to Zendesk. So you can see how your data will look after migrating to a new platform. It is entirely *free of charge*, and you can repeat it multiple times.

We strongly advise not to skip this step and check the results to avoid any inconsistencies after the Full Migration. Double-check your account has **admin privileges** in the source platform and Zendesk to run the Demo.

AFTER THE DEMO MIGRATION

1. CHECK THE RESULT IN ZENDESK

Demo migration is the exact copy of Full Data Migration but on a smaller scale. Check if all tickets migrated accordingly. What didn't transfer during the Demo will not transfer during the Full migration.

What to look at during your checking?

- All comments got migrated, and if the authors of the comments are the same
- The tickets are assigned to the correct agents
- All the custom field values got migrated
- The customers and companies migrated correctly
- Attachments migrated along with the labels
- The categories are appropriately assigned (in Knowledge Base migration)
- The automation rules did not update any of your demo data

We also have a detailed guide on how to check the results of demo migration to Zendesk on our [website](#).

2. CONSIDER A CUSTOMIZED DEMO

Do you have tickets with more replies, attachments, or notes than your usual ones and want to see how they migrate over to Zendesk? Request a custom demo, and we'll transfer the specific ticket IDs that you want. [Contact](#) our team to discuss the details.

DURING THE FULL DATA MIGRATION PROCESS

1. KEEP IN MIND THE BASICS

There may be several reasons for data migration. Some are simply looking for an upgrade, the others just moving separate teams. Despite your reasons, we advise running the Full Data Migration on a day with the smallest workload.

If it is critical, you can work on your source help desk during the transfer. But, the records created or updated after the Full Data Migration was started will not appear in Zendesk automatically. To keep that data, opt for [delta migration](#).

The Migration Wizard runs the process in the cloud. You don't have to keep the tab open during the process. Check back occasionally if you'd like or wait for a message from our team. We track all migrations, so if something goes wrong - we'll contact you immediately.

The duration of your Full data migration depends on the number of records you're transferring. That may take up a whole day and even night. Data import to Zendesk moves at a speed of about *2000 tickets per hour*. So you can roughly calculate the time it will take to transfer your data.

2. DON'T MAKE ANY LAST-MINUTE CHANGES

Any alteration can suspend your migration and take more time to migrate your data. If you spotted duplicate or unnecessary records on the source help desk, it's best to let them go through. When the migration is completed, do a little clean-up on Zendesk.

If you have new tickets coming into your source help desk, you can opt for a [delta migration](#) to get them migrated to Zendesk.

3. START THE FULL DATA MIGRATION

The Migration Wizard transfers each record one by one. Depending on the number of entities you have, the process may take up to 24 hours.

Note: Zendesk uses the UTC timezone during the migration, so you're likely to have at least a one-hour migration difference.

The migration begins if two requirements are met:



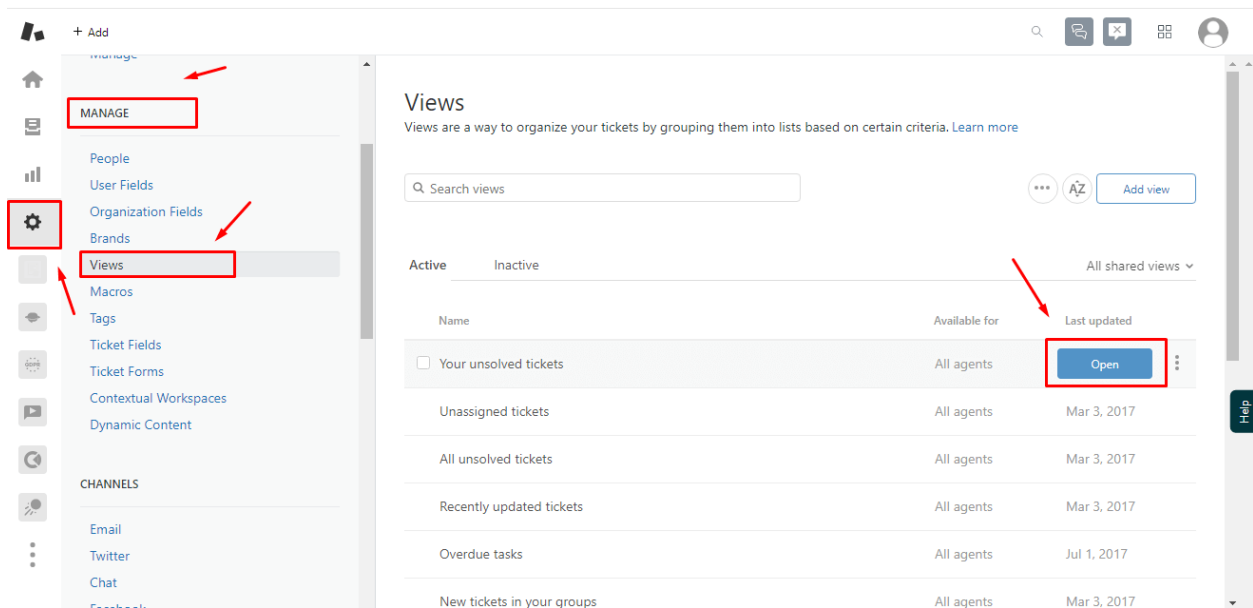
1. **Your payment is confirmed.** It may take some time, that's why we highly recommend you to make a transaction in advance. You can also choose the time and day and the migration by using our 'schedule' feature.
2. **You've agreed to the checklist.** Click on the corresponding checklist to open a mini-guide of the essential steps you should do prior to transfer. If everything looks good, put a tick in a checkbox.

AFTER THE FULL DATA MIGRATION

1. TAKE A DETAILED LOOK

Even in the case of the smooth Full Data Migration, take your time to check everything. It's essential to set search filters for all tickets to find everything you might need.

To do so, go to Admin > under Manage click 'Views' > click 'Open' to see all tickets related to a specific category. This will open a list of all needed tickets.



The screenshot shows the Zendesk Admin interface. In the left sidebar, the 'MANAGE' menu item is highlighted with a red box and an arrow. Below it, the 'Views' menu item is also highlighted with a red box and an arrow. The main content area is titled 'Views' and contains a search bar, a table of views, and an 'Add view' button. The table has columns for 'Name', 'Available for', and 'Last updated'. The first row is 'Your unsolved tickets', which has an 'Open' button highlighted with a red box and an arrow. Other rows include 'Unassigned tickets', 'All unsolved tickets', 'Recently updated tickets', 'Overdue tasks', and 'New tickets in your groups'.

Name	Available for	Last updated
<input type="checkbox"/> Your unsolved tickets	All agents	Open
Unassigned tickets	All agents	Mar 3, 2017
All unsolved tickets	All agents	Mar 3, 2017
Recently updated tickets	All agents	Mar 3, 2017
Overdue tasks	All agents	Jul 1, 2017
New tickets in your groups	All agents	Mar 3, 2017

The screenshot shows the Zendesk interface. On the left, a sidebar contains a 'Views' section with a red box around the 'Views' icon and a red arrow pointing to the 'Views' header. Below this, a list of views is shown, including 'unsolved tickets' (447), 'Unassigned tickets' (861), 'All unsolved tickets' (1.3k), 'Recently updated tickets' (0), 'Overdue tasks' (0), 'New tickets in your groups' (205), 'Pending tickets' (30), 'Recently solved tickets' (141), 'Unsolved tickets in your groups' (664), 'All' (0), 'Closed tickets' (7.6k), 'Solved Ticket' (141), 'Suspended tickets' (2), and 'Deleted tickets' (84). On the right, a table titled 'Your unsolved tickets' (447 tickets) is displayed. The table has columns for Subject, Requester, Requested, Type, Priority, and Assignee. The first row is highlighted, and the status is 'Open'. The table contains 14 rows of data, all with a 'Requested' date of 'Dec 18, 2009' and an 'Assignee' of 'Agent HDM'.

Subject	Requester	Requested	Type	Priority	Assignee
Display Issues on Firefox 2.05	Agent HDM	Dec 18, 2009	Question	Normal	Agent HDM
Display Issues on Firefox 2.05	Agent HDM	Dec 18, 2009	Question	Normal	Agent HDM
Incident 102408	QA HDM	Dec 18, 2009	Question	Urgent	Agent HDM
Incident 102411	QA HDM	Dec 18, 2009	Question	Urgent	Agent HDM
Incident 102408	QA HDM	Dec 18, 2009	Question	Urgent	Agent HDM
Incident 102410	QA HDM	Dec 18, 2009	Question	Urgent	Agent HDM
Incident 102410	QA HDM	Dec 18, 2009	Question	Urgent	Agent HDM
Incident 102410	QA HDM	Dec 18, 2009	Question	Urgent	Agent HDM
Incident 102410	QA HDM	Dec 18, 2009	Question	Urgent	Agent HDM
Incident 102408	QA HDM	Dec 18, 2009	Question	Urgent	Agent HDM
Incident 102407	QA HDM	Dec 18, 2009	Question	Urgent	Agent HDM
Incident 102411	QA HDM	Dec 18, 2009	Question	Urgent	Agent HDM

A tip from Help Desk Migration: Type * in a search bar to see the number of tickets. Pay attention to the number of records and their quality – if they are readable and in place.

2. SET UP

Your new workspace is now up and running. Connect the email service provider to your Zendesk instance. Enable all the notifications, and tune all the necessary settings. Then, update internal links for Knowledge Base, [forward emails to Zendesk](#).

If you still have some questions about the migration to Zendesk, you can reach out to any of [our experts](#) for a free consultation.

WHY MIGRATING WITH US



It's much quicker compared to transferring your records on 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 secure 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 it

Join thousands of happy customers who transmitted their data with the Help Desk Migration service and helped it to attain reputation and earn a variety of 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 records moving experience behind their shoulders and you will be happy to help you out through the whole transferring process at any time (even on weekends).



LOOKING FOR MORE DATA MIGRATION DETAILS?

Let's talk now

