



Help Desk Migration

FRESHDESK DATA MIGRATION CHECKLIST



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It's no secret that [data migration is a complex process](#) that many tend to put off until the transfer is inevitable. That's why our team has put up a detailed checklist on Freshdesk migration to make it easier for you.

However, before proceeding with the checklist itself, check out the list of records that our tool **can not** transfer to Freshdesk:

- Inline images
- Events (activities)
- Forums (except the cases when you migrate between two Freshdesk instances)
- Attachments to unpublished articles
- Attachments with a size of more than 15MB
- Links between articles
- Comments with the size over 20MB

If you want to migrate records unavailable for automated migration, [contact our support team](#).

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

BEFORE YOU SET UP THE MIGRATION

1. PICK A CUT-OFF DATE

Decide on your data transfer time that would have a minimum impact on your usual workflow.

Note: You can accelerate the migration if you contact the Freshdesk team in advance and ask to increase your *API limits*.

During the **Full Data Migration**, you have two options:

1. Use **the source help desk** and then request a Delta migration (**if you have [a Signature support plan](#)*). During a Delta migration, our tool will transfer all new and updated records to Freshdesk.
2. Work with **the target help desk** to omit data alteration.



2. DISCUSS IT WITH YOUR TEAM

1. Give everyone in your office a heads-up about the Freshdesk migration. This way, your agents have enough time to start closing tickets before the migration.
2. Try distributing specific responsibilities among different teams. It can be as simple as filtering the data or examining the tickets after the Full Data Migration.
3. Inform your CEO about data migration progress.
4. Send an email or create a calendar event as a reminder a day before the Full Data Migration.

3. FILTER YOUR DATA

Businesses can settle in different countries and locations that have specific requirements to the customer data serving and securing. So if you need preserve the historical records, or delete some of them, or transfer only certain data to your Freshdesk account – use a custom filtering of your help desk data to meet your specific business requirements.

Expert tip: Ask agents working with the tickets and other records daily to go through the data and decide what to keep and delete. If you haven't used certain records in a year, the chances you will need them again are close to zero.

Just reach out to our support team and tell us the specific criteria.

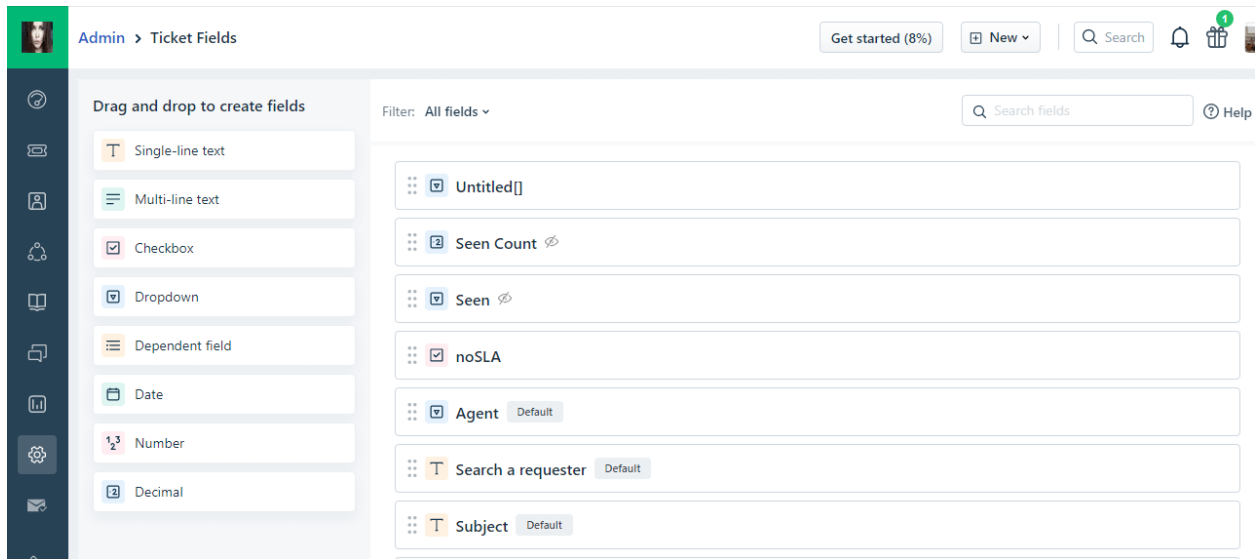
4. PREPARE FRESHDESK FOR THE TRANSFER

Just like you need to prepare your data for the transfer, so you should prepare the Freshdesk instance to receive data.

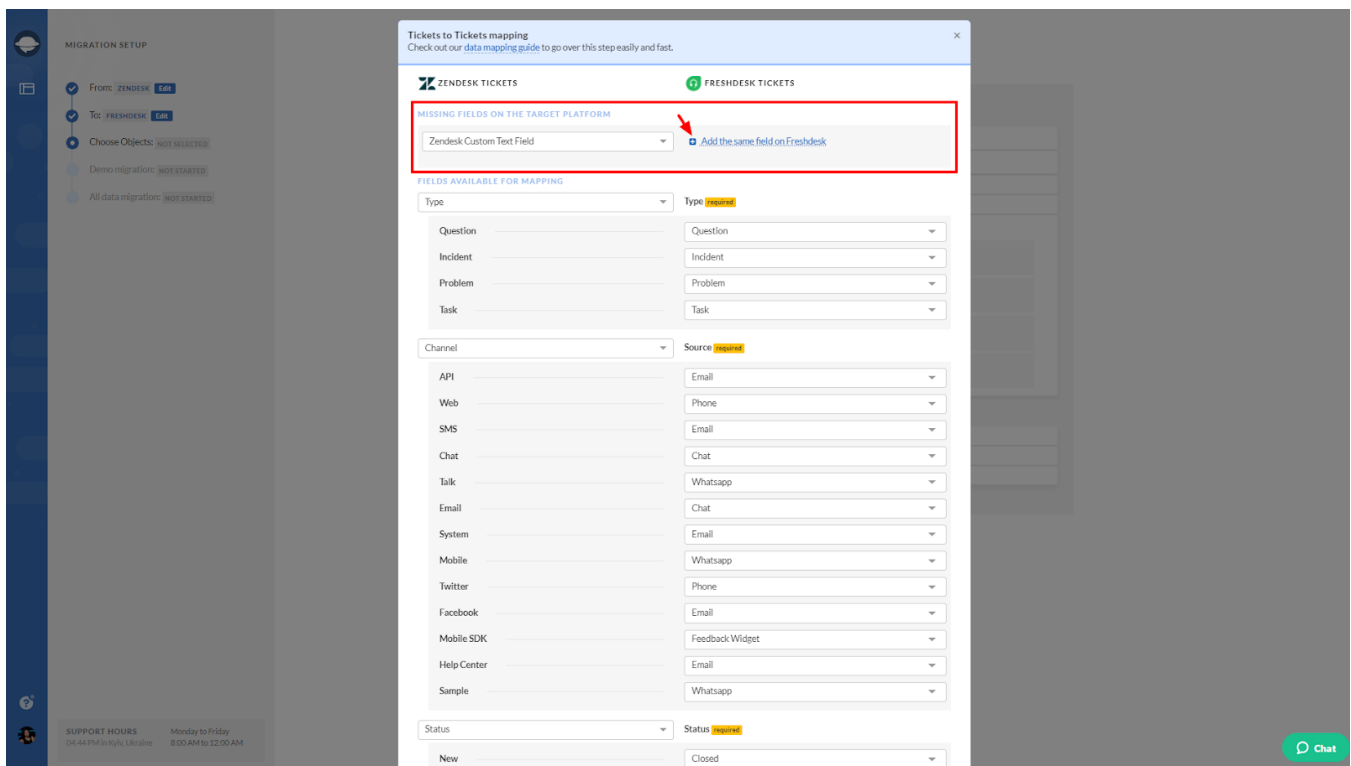
Start with, **creating custom fields** to locate the needed records in Freshdesk. Be sure to recreate the identical types of custom fields you have on your source help desk. You got two options:

a) Go to **Admin** → scroll to **General settings** → **Ticket Fields** → Use the drag-and-drop feature to create custom fields.





b) Create custom fields right away in Migration Wizard. While mapping tickets, click on **Add the same custom field in Freshdesk** button next to a source custom field you want to create. Wait a bit, and then map field values.



5. DEFINE SIMILARITIES AND DIFFERENCES

Before the Full Data Migration to Freshdesk, check the following:

1. Freshdesk considers inactive or deleted contacts as Spam. Double-check if you have such.
2. Delete contacts of all agents that have left your company. Moreover, add appropriate licenses to the existing agents.
3. Base64 inline images in Knowledge Base articles will migrate into attachments.
4. Create the required custom Contact and Company.
5. Ensure you have admin rights to your accounts in the source platform and Freshdesk.

6. EXPLORE CUSTOM OPTIONS

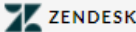
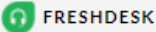
Consider getting a custom migration if:

1. your source help desk is heavily customized
2. your migration needs changes to a default migration process

Besides, you can choose from some of the pre-packaged options like:

- Add tags to migrated tickets to identify migrated data in Freshdesk. Great if you're migrating to an instance that already has tickets.
- Skip attachments to migrate data faster. Attachments can be pretty heavy. If you think you don't need them further on, consider skipping them.
- Migrate call recordings as ticket attachments to keep them in Freshdesk. (currently supported for importing from Zendesk only)
- Migrate content translations to keep language versions of the Knowledge Base articles.
- One time Demo with custom data transfer specific tickets and articles IDs.



HELP DESK OBJECTS

<input checked="" type="checkbox"/>	Groups	⇌ Match items	Groups
<input checked="" type="checkbox"/>	Agents	⇌ Match items	Agents
<input checked="" type="checkbox"/>	Organizations	>>>	Companies
<input checked="" type="checkbox"/>	Customers	>>>	Contacts
<input checked="" type="checkbox"/>	Tickets	⚙ Map fields	Tickets

Add new tag to the migrated tickets
Separate recently migrated tickets from existed on a platform

Skip attachments
Run your migration faster

Migrate call recordings
Move all your call recordings as attachments

One time Demo with custom data
Choose up to 20 records you want to import and provide their IDs

KNOWLEDGE BASE OBJECTS

<input checked="" type="checkbox"/>	Categories	>>>	Categories
<input checked="" type="checkbox"/>	Sections	>>>	Folders
<input checked="" type="checkbox"/>	Articles	⚙ Map fields	Articles

Migrate content translations
Import language versions of your KB articles

One time Demo with custom data
Choose up to 20 records you want to import and provide their IDs

Do you have questions on the fields mapping? [Let us help you!](#)

Expert tip: Among popular customizations, you might be interested in

- Migrating inline images as ticket attachments
- Assigning tickets to group only, not to agent (can be applied only to tickets with "Open" status)
- Migrating additional phone numbers or emails for contacts
- Migrating the original Source ticket ID into the subject of ticket
- Changing of the default migration process (migration of change and problem objects as tickets, migration of ticket events as private notes, migration of the information related to inactive users)

Need some specific custom work? Then [contact us](#) to discuss your needs and get a full-on custom migration.

YOU'RE ALMOST READY

1. ADD AGENTS (OPTIONAL)

You can create your agent on Freshdesk right from our Migration Wizard during setting of your data migration. If you can't create a new agent, be sure to check the number of your licenses on Freshdesk.

The way you map your source and Freshdesk agents, the same way they would be imported. If you have some inactive or deleted agents, you can add those tickets to a default agent that can be also set in during Agent and Group mapping stage.

2. FIND ACCESS CREDENTIALS

When launching a Free Demo, you need access credentials to the source platform and Freshdesk.

To connect Freshdesk with our tool, you need:

1. **URL:** URL of your company's Freshdesk account. Format - <https://domain.freshdesk.com/>
2. **API Key:** Go to Profile icon -> Profile Settings -> Your API Key

Note: You can only see API Key when your email is **verified**. You can revoke access to your accounts any time.

3. RUN A DEMO

Initiate a Demo Migration to test out the possible outcome of the Full Data Migration. During this data transfer, our tool moves 20 random tickets from your current helpdesk to Freshdesk. You can run it as many times as you need. Go through the steps below:

1. Sign in to your Migration Wizard.
2. Connect your source and target solutions.
3. Choose the data you want to import.

4. Match [agents and groups](#).
5. Map tickets and articles.
6. Pick up [automated options](#).
7. Start your Free Demo Migration.

AFTER THE DEMO MIGRATION

1. CHECK THE RESULTS OF THE DEMO TRANSFER IN FRESHDESK

As soon as your Demo Migration finishes, you see a table with four columns:

- all available records
- migrated records
- failed records
- skipped records

Look through the results by downloading reports on migrated, failed, and skipped records.

While checking the migrated records, consider the following:

1. if all comments got migrated with their authors preserved (keep in mind, that Freshdesk is sorting the comments from newest to oldest)
2. if tickets are assigned to the correct agents
3. if the custom fields, customers, companies, attachments, and labels migrated correctly
4. if the knowledge base categories are assigned properly

NOTE! Check each ticket, primarily its location and quality features. Only when you've examined that the Demo went successfully, proceed to the Full Data Migration.

For more information, [read the detailed guide](#) on how to check the results of demo migration in Freshdesk.



2. REQUEST A CUSTOM DEMO

If you have some tickets with more replies, attachments, or notes than your usual ones and want to see how they migrate over to Freshdesk, select [One time Demo with custom data](#) under tickets and articles. You can fill in up to 20 IDs to import specific tickets and articles. Ensure that the number of tickets and articles won't be more than 20.

DURING THE FULL DATA MIGRATION PROCESS

1. KEEP IN MIND THE BASICS

If you need to use one of your help desks, weigh your options:

- Work with a source help desk during the Full Data Migration. However, note that the created or updated records won't migrate to Freshdesk. So run a **Delta Migration** not to lose that data.
- Use a target help desk platform.

As the **Full Data Migration** goes on the cloud, you can check it from time to time or wait for our team to contact you.

2. DON'T CHANGE ANYTHING

We strongly recommend you not to make any changes during the Full Data Migration. If you notice any problems on your source platform - wait for the data transfer to complete. Only then can you either try to solve it by yourself or turn to the Help Desk Migration team for help.

3. INITIATE THE FULL DATA MIGRATION

Right after you press 'Start,' the Full Data Migration will begin.

The migration will only start when:

- **The payment has been confirmed.** Pay for data migration in advance. If you have any specific time or date, schedule your data migration.
- **You've agreed to the checklist.** After your payment is confirmed, run through a short checklist of things to do before migration. As soon as you are done, check the corresponding box.

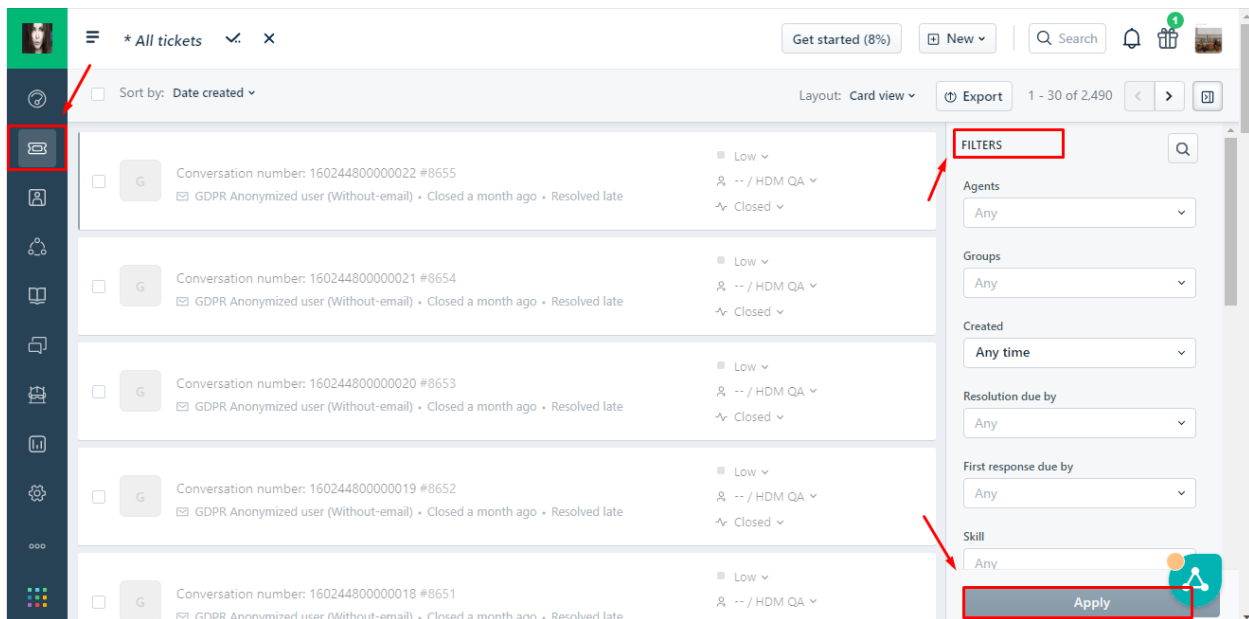
AFTER THE IMPORT IS DONE

1. CHECK, CHECK, AND ONCE AGAIN CHECK

Congratulations on the completed Full Data migration! There are still a few steps to do. First of all, check the results of the Full Data Migration.

By default, Freshdesk does not show all the tickets.

To view them, go to **Tickets > Filters > Apply the needed filters**. You can choose to view the tickets by Date, Agents, Groups, and so on.



If you can't locate something, check if search filters are set for all tickets and any time. Later, if you haven't solved the problem, write to our support reps.

2. UPDATE YOUR LINKS

As the **Full Data Migration** is completed, set up your Freshdesk account:

- Enable all the notifications, and set the necessary settings.
- Update the Knowledge Base links and enjoy your new help desk.



- Ensure to update your articles in Knowledge Base by paying special attention to attachments. Due to certain peculiarities of the platform (Base64 encoding), at some point, you'll need to reupload the images in articles, because as soon as your source help desk expires - the images in Knowledge Base will disappear.



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 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 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

