



Help Desk Migration

FRESHSERVICE

# DATA MIGRATION CHECKLIST



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Switching between help desks has always been twisted. Yet, it becomes less complicated if you have a detailed migration checklist. That's why we've created one, exclusive to Freshservice.

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Before diving into the guide, note that our automated migration service can import all core data to Freshservice except *inline images*. If you consider importing inline images, [contact our support team](#). They will come up with a custom solution.

During the Full Data Migration, you can keep working on your current help desk system or run support on Freshservice. Still, the new and updated records won't be migrated, but you can import those data with help of [Delta Migration](#). Note that Delta option is available only in Signature support plan.

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

## BEFORE YOU SET UP THE MIGRATION

### 1. CHOOSE A DATE FOR MIGRATION

*Give your team enough time to prepare. Your agents need to get used to Freshservice first, or close as many tickets as possible. And choose the day with the smallest amount of help desk related work.*

### 2. SPEAK TO YOUR TEAM

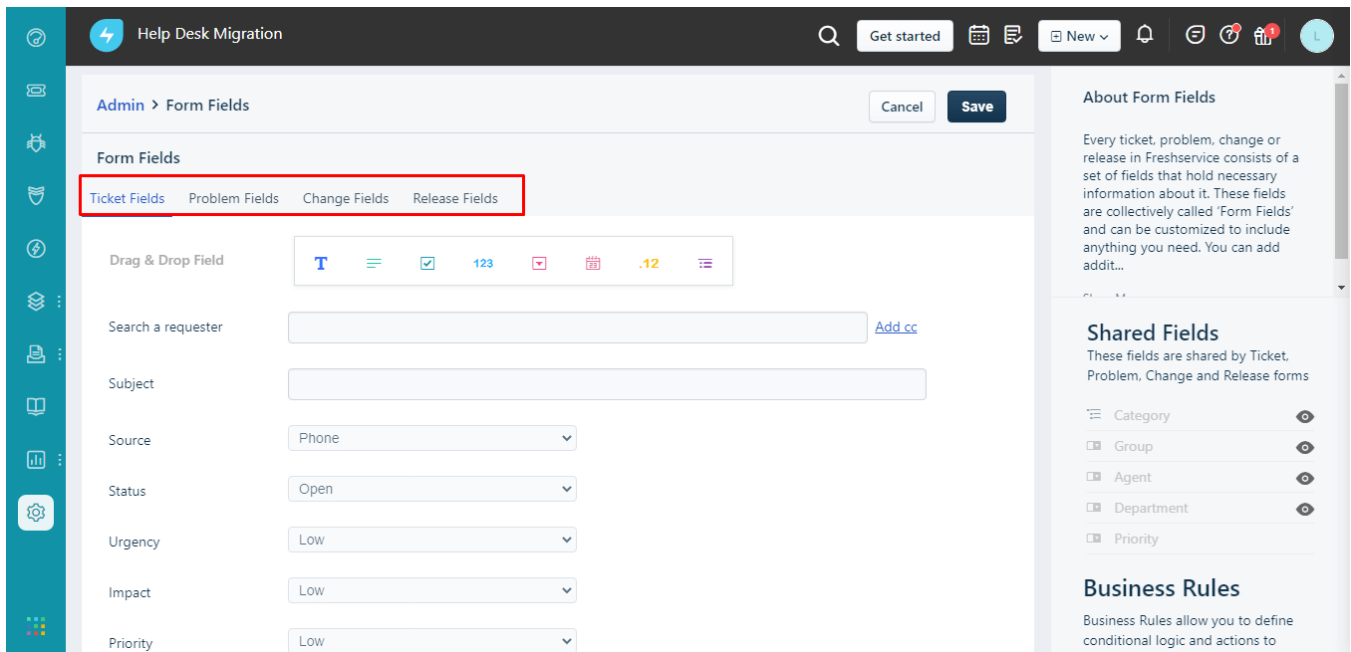
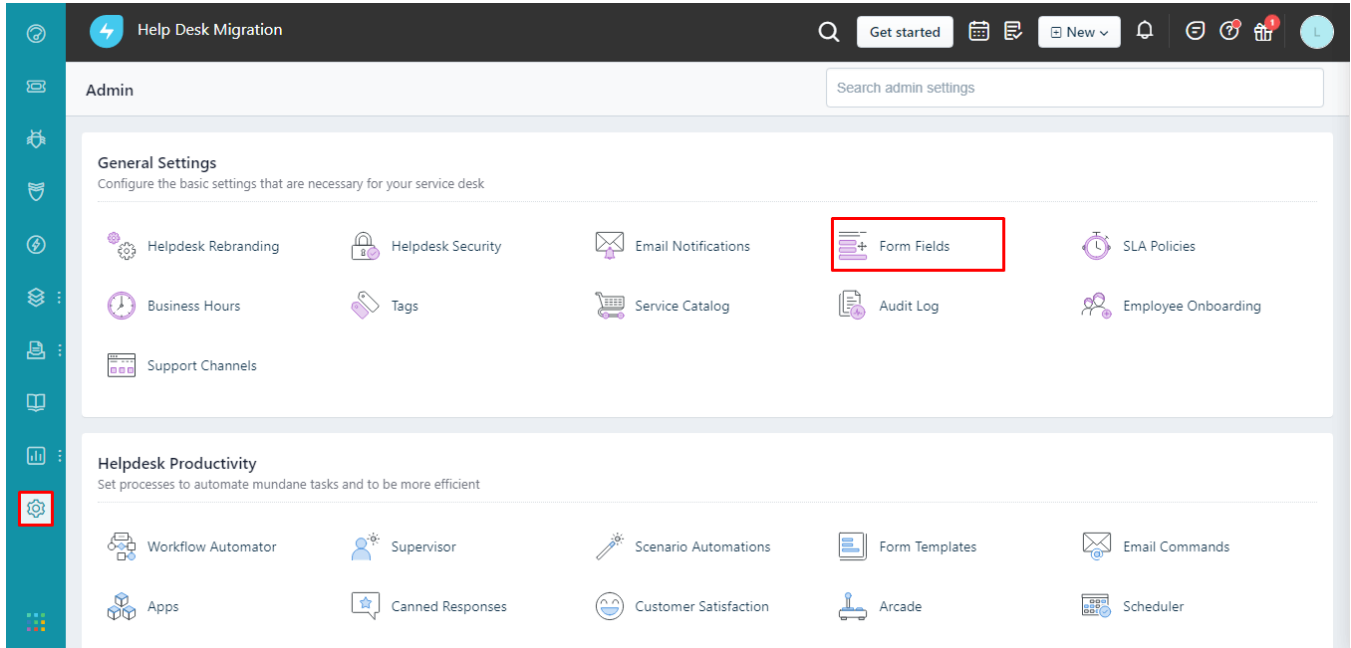
Ensure to inform your agents know about Freshservice import or share specific responsibilities like speed up checking the results of Full Data Migration.

### 3. PREPARE FRESHSERVICE FOR THE TRANSFER

Locate your data after migration by adding the same custom fields as you have on the source platform.

To create custom fields on Freshservice, go to Admin → under **General Settings** click **Form Fields** → choose the field type → fill in the needed credentials → hit **Save**.





If you want to speed up the Full Data Migration, contact Freshservice and request them to increase your API limits temporary.

## 4. WHAT CUSTOMIZATIONS ARE AVAILABLE

If you have any specific requirements for Freshservice transfer, [contact our support team](#). Our automated data migration offer options like:

- Data filtering by different criteria (creation date, tags, custom fields, groups, organizations, assignees, etc.)
- Change 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, Closed At date of the ticket into the 1st private comment in ticket, inline images as ticket attachments)
- Adding information to the migrated data (marking tickets with extra tags, adding legacy ticket ID to the ticket subject)
- Transfer contact custom fields

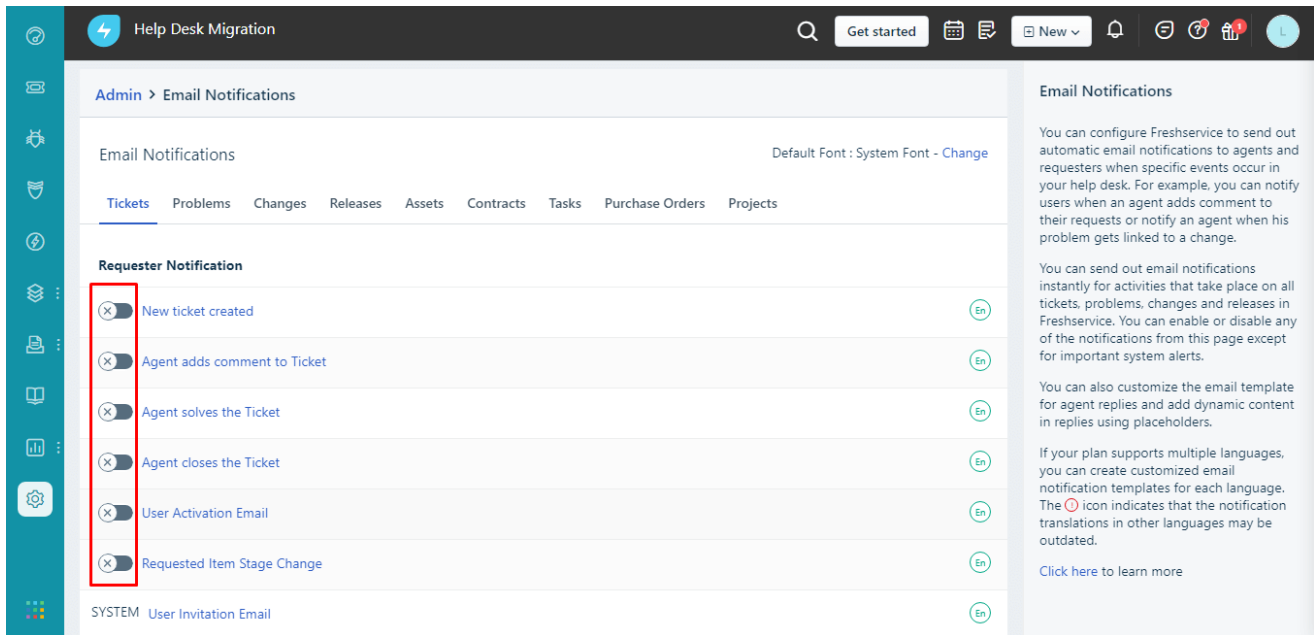
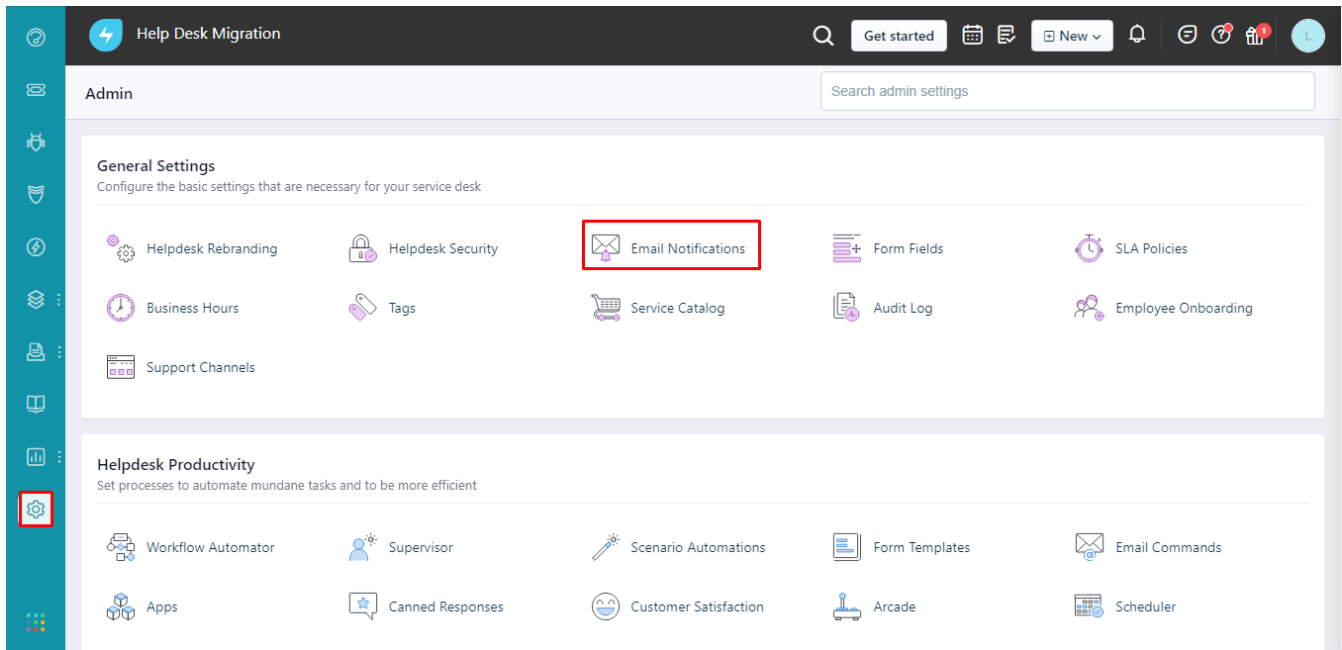
## YOU'RE ALMOST READY

### 1. TURN OFF NOTIFICATIONS

Disable Email Notifications and other triggers, including validation and duplicate rules. That will save you from getting a pile of notifications during the **Full Data Migration**.

Go to **Admin** > under **General settings**, click **Email Notifications** > go through all tabs and disable email notifications.



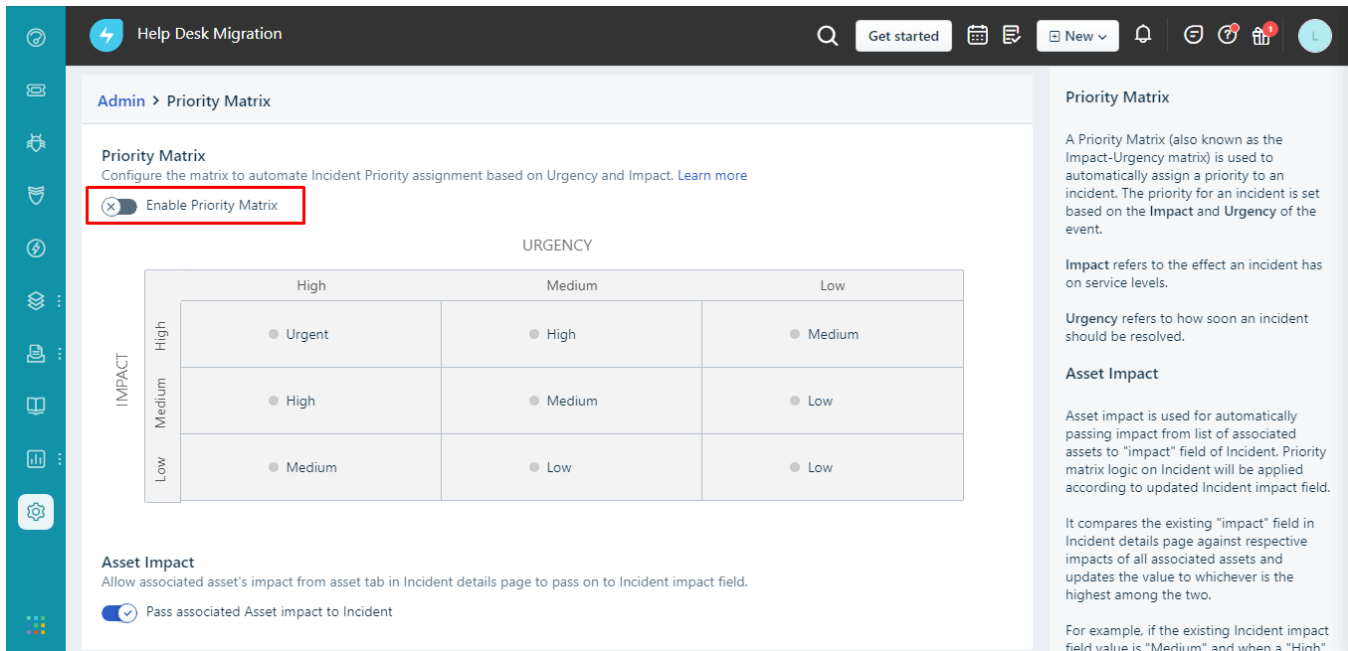
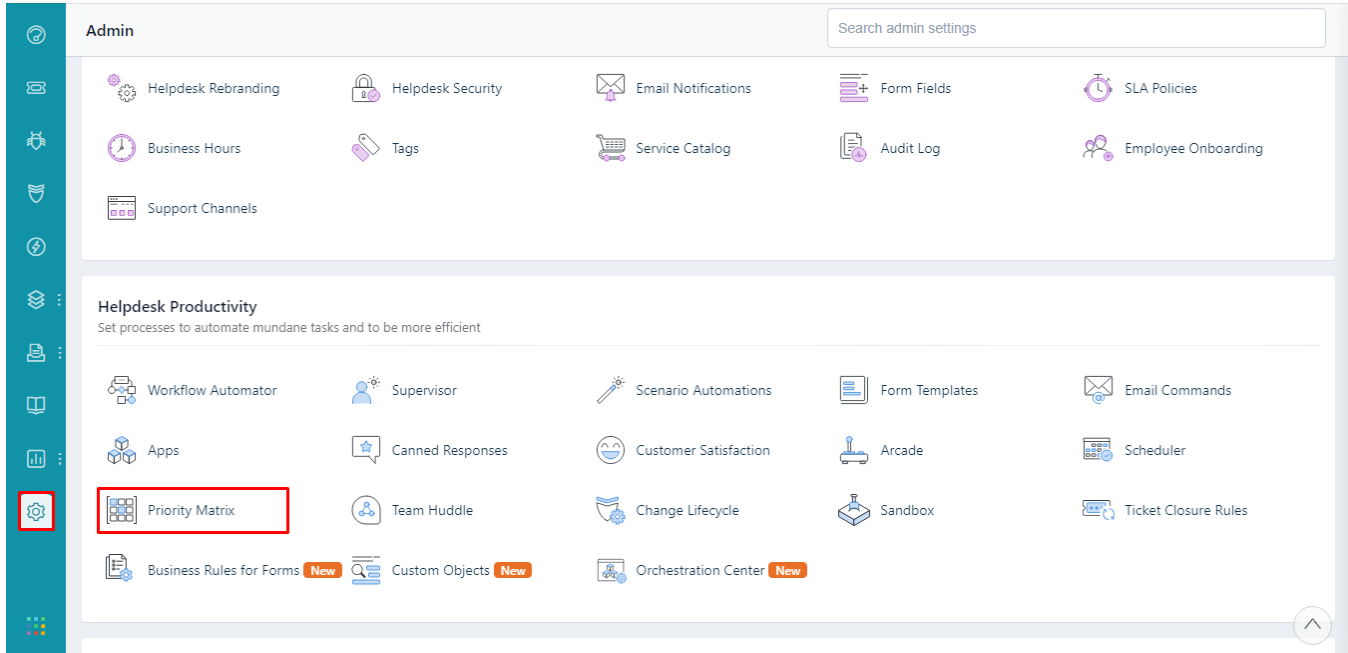


## 2. DISABLE PRIORITY MATRIX

You need to switch off Priority Matrix to keep all priorities as they are in the source help desk.



Go to **Admin** > click on **Priority Matrix** under **Helpdesk Productivity** > toggle OFF the **Enable Priority Matrix** option.



### 3. DISABLE WORKFLOW, SCENARIO AUTOMATIONS, AND CLOSURE RULES

Before setting up data migration to Freshservice, turn off:

- Workflow
- Scenario Automations
- Closure Rules

For more details on the processes, check out a [detailed visual guide](#).

## 4. FIND ACCESS CREDENTIALS

Before starting the Demo Migration, find the required access credentials to the source platform and Freshservice.

To connect Freshservice with Migration Wizard, you need:

- **URL:** URL of your company's Freshservice account. Example - <https://domain.freshservice.com/>.
- **API Key:** Profile icon -> Profile Settings -> Your API Key.

## 5. RUN A DEMO MIGRATION

Before setting up the Full Data Migration, try the Free Demo. In brief, Migration Wizard exports 20 random source tickets and 20 knowledge base articles to Freshservice. You can edit your Demo Migration setting and re-run your Demo. Note that you get the same Demo results with the same settings.

1. Log in to your Migration Wizard account.
2. Connect your source and target systems.
3. Pick up the data you want to import.
4. Match [agents](#) and groups.
5. Map tickets and articles fields.
6. Choose [automated options](#).
7. Set up your Free Demo Migration.





# AFTER THE DEMO MIGRATION

## 1. CHECK THE RESULT IN FRESHSERVICE

Once your Free Demo Migration is done, you need to inspect every report and check the results. While examining migrated data, pay attention to:

- 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 fields got migrated
- the customers and companies are migrated correctly
- the attachments are migrated

**Note:** if something hasn't migrated during Demo Migration, it won't transfer during the Full Data Migration.

If you need more detailed information, [read this guide](#) exclusive to Freshservice.

## 2. TURN ON YOUR NOTIFICATIONS, TRIGGERS, AUTOMATIONS

Turn on all disabled notifications, priority matrix, workflow, scenario automations, and closure rules using the same guide as for disabling.

# BEFORE THE FULL DATA MIGRATION

## 1. CHOOSE YOUR MIGRATION OPTION

During data migration, you can work on your source help desk during the transfer. However, the records created or updated during the **Full Data Migration** will not appear in Freshservice. So you can go for the [Delta Migration](#) to move all new and updated customer data.

The Migration Wizard runs the process in the cloud. You don't have to keep the tab open during the process. You can check the **Full Data Migration** page occasionally or wait for a message from our team.



## 2. RUN FULL DATA MIGRATION

Our automated service moves each record one by one. Depending on the volume of data you have, the transferring process might take from 20 minutes to a few days.

The Full Data Migration begins when **your payment is confirmed**. It may take some time; that's why make a transaction in advance or schedule data migration. And when **you've agreed to the checklist**.

## AFTER THE IMPORT IS DONE

### 1. EXAMINE EVERYTHING

Full Data Migration completed, it's time to check if everything imported correctly. Note that you have five days to inspect the results. After five days, your data migration gets archived.

If you can't find some records, check if search filters are set for all tickets and any time period. If the problem doesn't, [drop a line](#) to our support team.

### 2. SET UP A NEW PLATFORM

- Enable email notifications
- Switch on Priority Matrix
- Turn on Workflow, Scenario Automations, and Closure Rules
- Update the Knowledge Base links and enjoy your new help desk



# 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

