



Help Desk Migration

FRESHSERVICE

# DATA MIGRATION CHECKLIST



# Table of Contents

<b>BEFORE YOU SET UP THE MIGRATION</b>	<b>3</b>
1. CHOOSE A DATE FOR MIGRATION	4
2. SPEAK TO YOUR TEAM	4
3. PREPARE FRESHSERVICE FOR THE TRANSFER	4
4. WHAT CUSTOMIZATIONS ARE AVAILABLE	5
<b>YOU'RE ALMOST READY</b>	<b>6</b>
1. TURN OFF NOTIFICATIONS	6
2. DISABLE PRIORITY MATRIX	7
3. DISABLE WORKFLOW, SCENARIO AUTOMATIONS, AND CLOSURE RULES	8
4. FIND ACCESS CREDENTIALS	9
5. RUN A DEMO MIGRATION	9
<b>AFTER THE DEMO MIGRATION</b>	<b>10</b>
1. CHECK THE RESULT IN FRESHSERVICE	10
2. TURN ON YOUR NOTIFICATIONS, TRIGGERS, AUTOMATIONS	10
<b>BEFORE THE FULL DATA MIGRATION</b>	<b>10</b>
1. CHOOSE YOUR MIGRATION OPTION	10
2. RUN FULL DATA MIGRATION	11
<b>AFTER THE IMPORT IS DONE</b>	<b>11</b>
1. EXAMINE EVERYTHING	11
2. SET UP A NEW PLATFORM	11
<b>WHY MIGRATING WITH US</b>	<b>12</b>



Shifting between help desks can be a bit of a puzzle, but it all falls into place when you have our comprehensive migration checklist. Introducing our exclusive checklist, tailored specifically for Freshservice migration.

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As you start exploring this guide, it's important to remember that our automated migration service can seamlessly transfer all your crucial data to Freshservice, with **only a few exceptions**.

- inline images
- rules
- automations
- assets
- ticket activity log
- audit log
- macros
- organization custom fields
- problems analysis cause (problems analysis impact, problems analysis symptoms, problems due date, problems attachments, tasks attachments, problems note attachments, change notes attachments)

When it comes to importing inline images, it's a great idea to [contact our support team](#). They'll work with you to develop a tailored data migration solution.

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Throughout the Full Data Migration process, you can continue using your current help desk system or rely on Freshservice for providing customer support. Just keep in mind, any new or updated records won't be transferred, but you can import them using the Delta Migration option. Please note that [Delta Migration](#) is exclusively available with the Signature support plan.

#### Keep an eye on the following data migration points

- When it comes to the migration of tickets and other records, the process remains consistent during both the Demo Migration and the Full Data Migration. So, here's the scoop: If any of your data didn't find its way to the new destination during the Demo Migration, it should not transfer during the Full Data Migration either.
- After the Demo Migration wraps up, it's time to grab those nifty reports for migrated, skipped, and failed records. Give them a thorough scan and ensure that every precious



bit has made its way to the new destination smoothly and successfully. And if anything seems a tad fuzzy or bewildering, don't you fret! Just tap into the boundless wisdom of our support team, and they'll swoop in to save the day.

- When you make the switch to Freshservice and contact is deleted, it causes the ticket to be chunked into the spam abyss and ultimately, and therefore, it gets deleted. Pay attention to this aspect to prevent any ticket casualties.
- Due to the restrictions in Freshservice, you can't migrate the users with Admin roles along with their tickets. If you want to migrate the tickets of an Admin user or associate this user's data, you will need to convert the Admin to an agent. By doing so, all the data will be imported successfully. Once the migration is completed, you can revert the role of this user back to Admin.
- When creating a Freshservice ticket, a description is required. To ensure a smooth data import, our Migration Wizard automatically adds the ticket subject to the description field. After the ticket is created, the comments from the source platform are imported; and the last customer's comment may appear duplicated. That way, the chronological order of comments is maintained.
- 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

*It's important to grant your team enough time for preparation. Encourage your agents to become acquainted with Freshservice or to concentrate on resolving existing tickets as efficiently as possible. When scheduling, aim for a day with the least help desk-related work.*

### 2. SPEAK TO YOUR TEAM

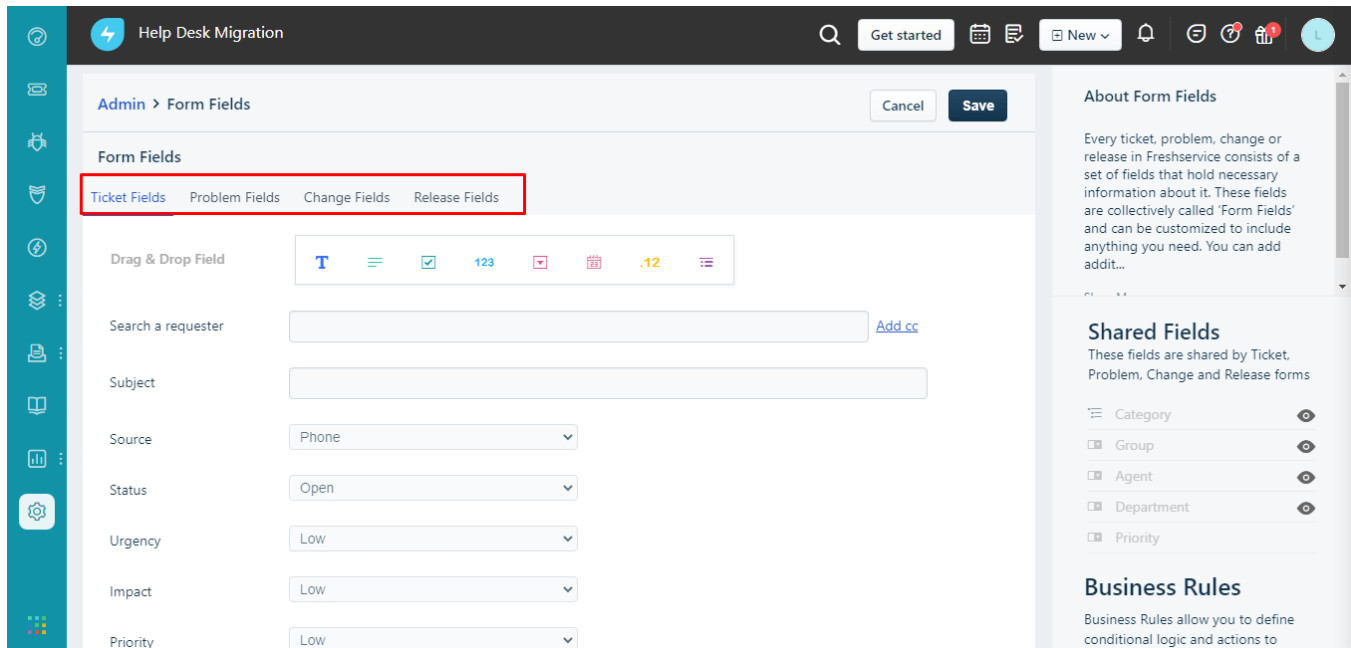
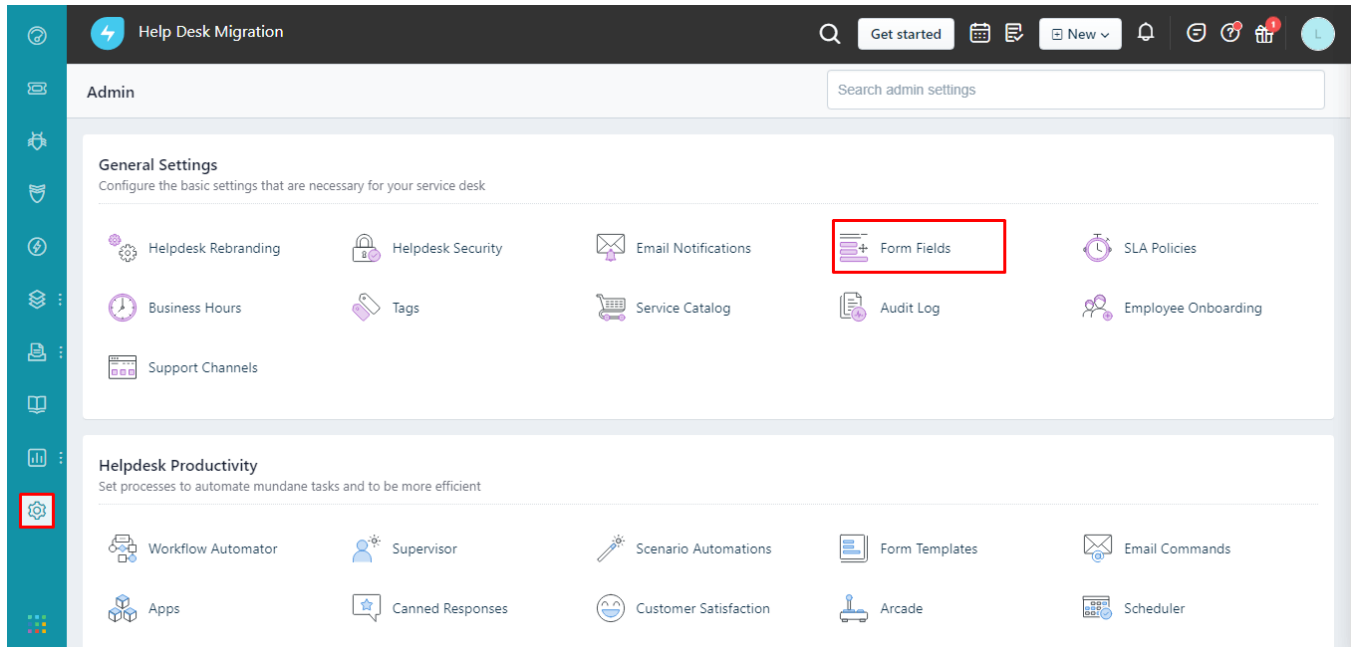
It's important to brief your agents about Freshservice import or consider delegating particular tasks, like accelerating the review of Full Data Migration results.

### 3. PREPARE FRESHSERVICE FOR THE TRANSFER

To find your data after migration, simply replicate the same custom fields you have on your 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 → click **Save**.



To speed up the Full Data Migration process, reach out to Freshservice and request a temporary API limit increase.

## 4. WHAT CUSTOMIZATIONS ARE AVAILABLE

If you have any specific requirements for Freshservice transfer, [contact our support team](#). The availability of customizations depends heavily on your source platform. Our automated data migration offers 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 a 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)
- Migrate contact custom fields

## 5. HOW TO MIGRATE TO OR FROM THE SELECTED WORKSPACE

The latest update to our Freshservice migration feature offers you even more flexibility and convenience when importing data to or from your Freshservice workspace.

Let's dive into the details. When you wish to import data into one of your Freshservice workspaces, simply navigate to the target platform connection stage and choose your desired workspace from the drop-down menu.

The screenshot displays the 'MIGRATION SETUP' interface. On the left, a sidebar contains a 'MIGRATION SETUP' section with fields for 'From: ZENDESK' and 'To: FRESHSERVICE', both with 'Unit' dropdowns. Below these are sections for 'Choose Objects: NOT SELECTED', 'Demo migration: NOT STARTED', and 'All data migration: NOT STARTED'. At the bottom of the sidebar is a 'SUPPORT HOURS' section indicating 'Monday to Friday 8:00 AM to 12:00 AM'. The main area shows 'SOURCE Zendesk connected' and 'TARGET Freshservice connected', each with an 'Edit' button. Below this is a 'Configure your Freshservice connection' section with a 'Workspaces' dropdown menu. The dropdown is open, showing options: 'test', 'My Team', 'IT', 'HR', 'Legal', and 'Facilities'. A red arrow points to the 'Facilities' option. A 'Continue >' button is located at the bottom left of the workspace selection area.



Once you've successfully connected Freshservice and selected the workspace you need, you can proceed to map your data from the source platform to your chosen Freshservice workspace.

The image shows two screenshots from the Help-Desk-Migration.com interface. The left screenshot is the 'MIGRATION SETUP' screen. It has a sidebar with a home icon, a menu icon, and a help icon. The main content area has a 'From: ZENDESK' section with a checked 'Url:' field. Below it is a 'To: FRESHSERVICE' section with a checked 'Url:' field and a 'Workspaces: IT' dropdown. Further down are sections for 'Choose Objects: NOT SELECTED', 'Demo migration: NOT STARTED', and 'All data migration: NOT STARTED'. At the bottom is an 'IMPORTANT MIGRATION NOTES' section with text about data transfer and a list of checks to perform before migration. The right screenshot is the 'MAPPING' screen titled 'Select Objects'. It shows a table mapping Zendesk objects to Freshservice objects. A red arrow points to the 'Groups' row under 'HELP DESK OBJECTS'. The table has columns for 'ZENDESK' and 'FRESHSERVICE'. Below the table is a 'Continue >' button and a note: 'Click to start a free trial migration to the specified target.'

ZENDESK		FRESHSERVICE	
<b>HELP DESK OBJECTS</b>			
<input type="checkbox"/>	Groups	>>>	Groups
<input type="checkbox"/>	Agents	>>>	Agents
<input type="checkbox"/>	Organizations	>>>	Departments
<input type="checkbox"/>	Customers	>>>	Requesters
<input type="checkbox"/>	Tickets	>>>	Tickets
<b>KNOWLEDGE BASE OBJECTS</b>			
<input type="checkbox"/>	Categories	>>>	Categories
<input type="checkbox"/>	Sections	>>>	Folders
<input type="checkbox"/>	Articles	>>>	Articles

If your migration scenario involves importing data from Freshservice to another helpdesk, fear not. You can easily select the specific workspace you want after connecting your account to our Migration Wizard.

The image shows a screenshot of the 'MIGRATION SETUP' screen. The sidebar is the same as in the previous image. The main content area has a 'From: FRESHSERVICE' section with a checked 'Url:' field. Below it is a 'To: NOT SELECTED' section. Further down are sections for 'Choose Objects: NOT SELECTED', 'Demo migration: NOT STARTED', and 'All data migration: NOT STARTED'. At the bottom is an 'IMPORTANT MIGRATION NOTES' section. A red arrow points to the 'Workspaces' dropdown menu, which is open and shows a list of workspaces: 'My Team', 'My Team', 'IT', 'HR', 'Legal', and 'Facilities'. The 'IT' workspace is selected. Below the dropdown is a 'Continue >' button. At the bottom of the screen is a 'SUPPORT HOURS' section with text: 'Monday to Friday 8:00 AM to 12:00 AM'.

After you've chosen your target platform, it's a breeze to match and map data from your selected workspace to the destination platform.

**MIGRATION SETUP**

From: **FRESHSERVICE**

☒ Url: Workspaces: IT

To: **ZENDESK**

☒ Url:

Choose Objects: **NOT SELECTED**

Demo migration: **NOT STARTED**

All data migration: **NOT STARTED**

**IMPORTANT MIGRATION NOTES**

During the Full migration data will be transferred the same way it did during Demo, so check Demo results thoroughly.

Before proceeding to Full Data Migration, check the following:

- If the custom fields are created in Zendesk and are properly mapped.
- If all the Automations are disabled.
- If all the agents are created and properly matched
- If all integrations are turned off.
- You will be prompted to update mapping and matching in case if you removed any

**MAPPING**

**Select Objects**

**FRESHSERVICE**

**HELP DESK OBJECTS**

<input type="checkbox"/>	Groups	>>>	Groups
<input type="checkbox"/>	Agents	>>>	Agents
<input type="checkbox"/>	Departments	>>>	Organizations
<input type="checkbox"/>	Requesters	>>>	Customers
<input type="checkbox"/>	Tickets	>>>	Tickets

**KNOWLEDGE BASE OBJECTS**

<input type="checkbox"/>	Categories	>>>	Categories
<input type="checkbox"/>	Folders	>>>	Sections
<input type="checkbox"/>	Articles	>>>	Articles

Do you have questions on the fields mapping? Let us help you!

**Continue >**

Click to start a free trial migration to the specified target.

You can select the primary workspace in the Migration Wizard if you don't have any additional workspaces.

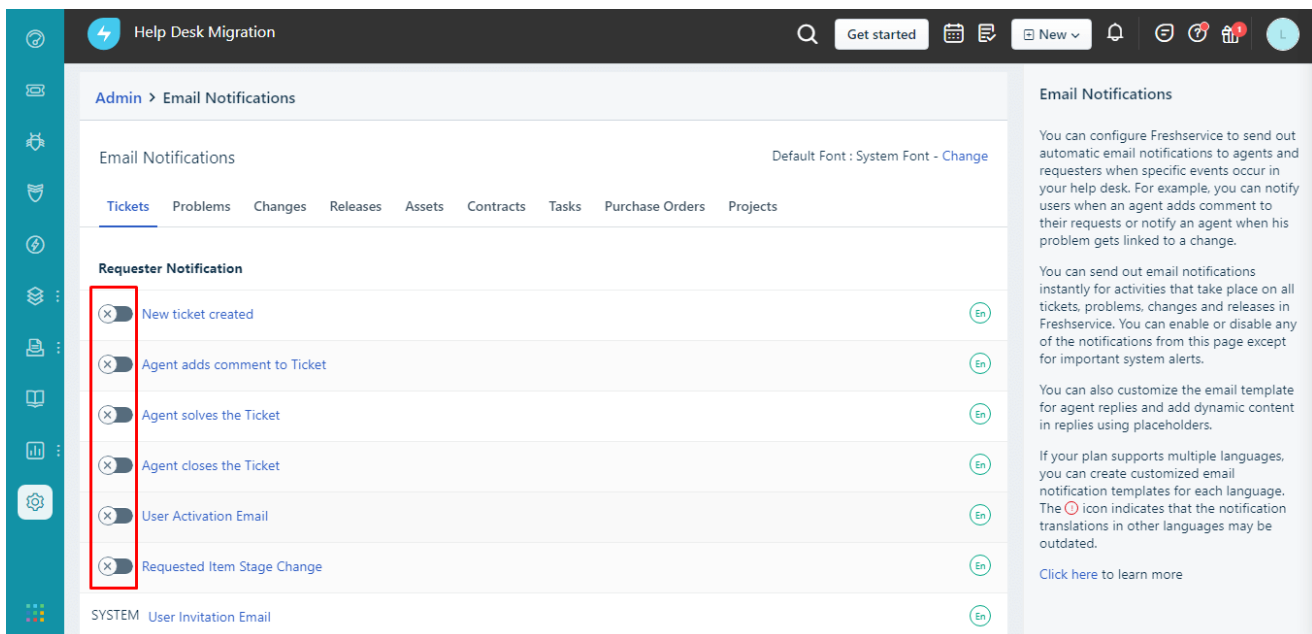
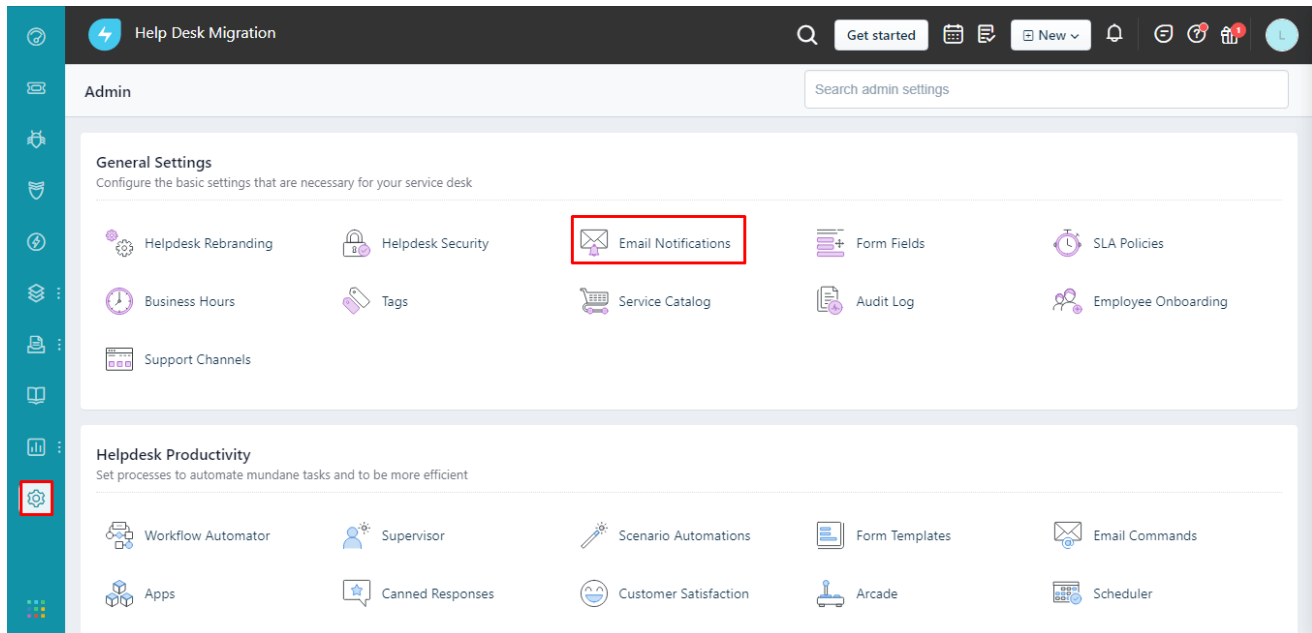
# YOU'RE ALMOST READY

## 1. TURN OFF NOTIFICATIONS

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

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

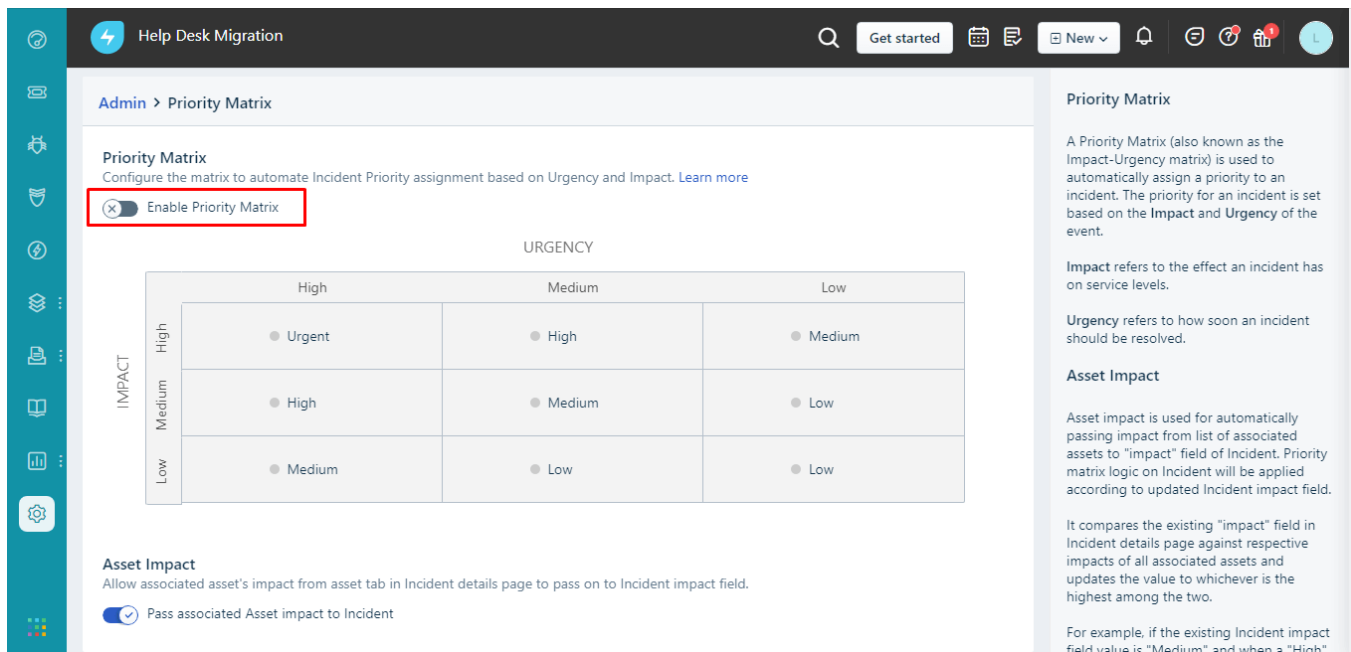
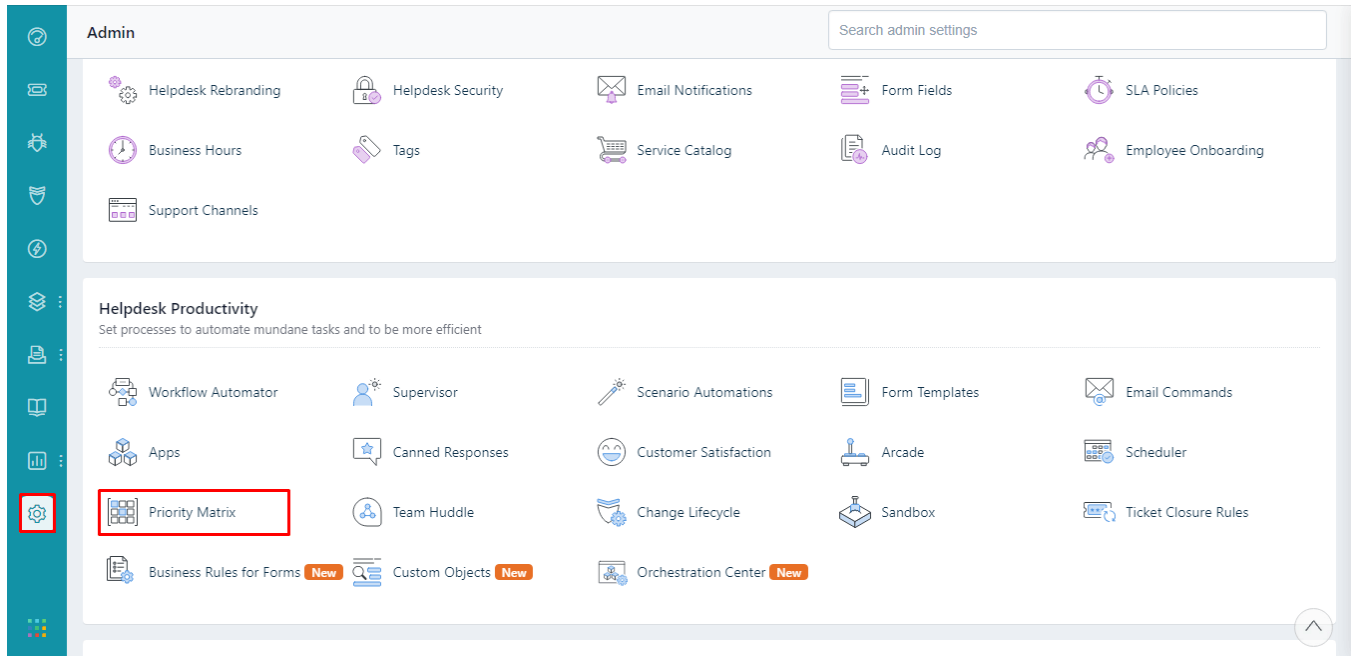




## 2. DISABLE PRIORITY MATRIX

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 THE 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

After completing your Free Demo Migration, it's crucial to inspect every report and verify the results. While reviewing the migrated data, pay special attention to the following:

- all comments have been migrated, and that the authors of the comments remain the same



- the tickets are correctly assigned to the appropriate agents
- all the custom fields have been migrated
- the customers and companies have been migrated correctly
- download attachments from your target platform and check if they have been imported correctly

**Keep in mind:** if anything hasn't migrated during the Demo Migration, it won't be imported during the Full Data Migration.

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

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

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

# BEFORE FULL DATA MIGRATION

## 1. CHOOSE YOUR MIGRATION OPTION

Throughout Freshservice data migration, you can work on your source help desk. Just remember, records created or updated during Full Data Migration won't show up in Freshservice. To move all new and updated customer data, consider using [Delta Migration](#).

The Migration Wizard operates in the cloud, so there's no need to keep the tab open. You can periodically check the Full Data Migration page or wait for a message from our team.

## 2. RUN FULL DATA MIGRATION

Our automated data migration service moves each record individually. Depending on your help desk data volume, the migration process can take anywhere from 20 minutes to a few days.

You can start your Full Data Migration as soon as **your payment is confirmed**. To minimize delays, consider making the transaction in advance or scheduling the data migration.



# AFTER THE FRESHDESK IMPORT IS DONE

## 1. EXAMINE EVERYTHING

Now that the Full Data Migration is finished, it's time to ensure that everything has been imported correctly. Remember, you have a five-day or ten-day window to review the results. The time for inspecting results depends on your [support package plan](#). After this period, your data migration will be archived.

If you're having trouble finding specific records, be sure your search filters are set to include all tickets and any time period. If the issue persists, don't hesitate to, [reach out to our support team](#).

## 2. GETTING STARTED WITH PLATFORM SETUP

- Enable email notifications
- Switch on the Priority Matrix
- Turn on Workflow, Scenario Automations, and Closure Rules
- Update your Knowledge Base links and enjoy your customer service platform.



# WHY MIGRATE 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 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 in retaining 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 with years of records moving experience behind their shoulders, and you will be happy to help you through the whole transferring process at any time (even on weekends).



# LOOKING FOR MORE DATA MIGRATION DETAILS?

Let's talk now

