



Front

DATA MIGRATION CHECKLIST



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Want to [migrate to Front](#)? Say no more. Help Desk Migration offers an automated service to seamlessly migrate tickets, contacts, requesters, attachments, comments, and related records. Match and map records without downtime and import data to Front effortlessly. Check if you have admin rights on your source and Front accounts and run a pain-free migration in just a few clicks!

Migration Wizard will transfer to Front:

- Tickets (conversations)
 - Created date
 - CCs
 - Tags
 - Requesters
 - Attachments
 - Comments (Author, Created dates, and Visibility)
 - Public notes
 - Private notes
- Customers (contacts)
- Agents (teammates)
 - The Default Agent is the first agent on the list. This option helps you keep data on unassigned, inactive, or deleted agents.

What Won't Be Migrated

- Organizations
- Custom fields
- Inline images
- Knowledge base data
- Macros
- Triggers
- Automations
- Other settings

Do you have some rather unique Front import needs? Don't fret—we've got you covered. [Tell us about any specific data migration requirements](#), and we'll deliver a customized solution just for you.



Before You Start a Migration

Migration Planning and Strategy

When it comes to data migration strategy, there's no one-size-fits-all approach. Based on our extensive experience in handling data migrations for clients, we've discovered two reliable methods that consistently yield excellent results:

1. Automated or [custom data migration](#). This method involves using Migration Wizard and built-in custom options or tailoring the migration process to meet the specific needs of the business.
2. Combined Approach. Another approach is to combine automated or custom data migration with Delta migration. By migrating only the changes made since the last migration, you can reduce the risk of errors and save valuable time.

To determine the best approach for your unique situation, you need to consider several factors, such as the size of your data and the complexity of your systems. Take the time to carefully evaluate your needs and choose the method that works best for you.

Pre-migration Settings on Front Account

To ensure a seamless transition to Front, you must take care of a few important settings. Here are the steps you should follow:

1. To connect your Front account, please disable two-factor authentication (2FA) in your Frontapp settings. If you need help with this, please [refer to Front's help center article](#) or contact our support team.
2. After disabling 2FA, you must generate an API token in Front. This will allow us to securely transfer your data to Frontapp. Our help center has detailed instructions on [how to generate an API token](#) and a helpful video tutorial.
3. Next, you'll want to ensure that all agents who need to be transferred to Front are added to your account and that they've accepted their invitation to join your team. To make this process as easy as possible, we recommend following the simple guides on [adding new teammates to Front](#) and [inviting new teammates](#).

If you have any questions or issues with these steps, don't hesitate to contact our support team for assistance.



Setting Up Data Migration to Front

To ensure a seamless migration, we recommend running a free Demo migration using our Migration Wizard. This allows you to test the migration settings and make any necessary changes before starting the Full migration. Plus, you can rerun the Demo as many times as you need to get things just right.

However, it's important to note that each Demo migration creates a new set of tickets, and the previous set is not deleted. To avoid ticket duplicates, we recommend deleting the tickets migrated during the Demo before starting the Full migration.

Here's how to get started with setting up your data migration to Front:

Step 1. Sign Up for the Help Desk Migration Account

You can sign up for a Help Desk Migration account using your Google or Microsoft account or work email. If you choose the work email option, you'll need to provide your full name and work email and choose a secure password.

Ready to migrate with ease? Sign up now!

- ✔ Simple, code-free data migration across platforms
- ✔ Fully featured a free trial with your data
- ✔ On-demand custom migration development
- ✔ Zero downtime and no workflow disruptions

[Sign up with Google](#)

[Sign up with Microsoft](#)

or

Full Name (required)

Work Email (confirmation required)

[Sign up with email](#)

Already have an account? [Sign In](#)

By signing up you agree to our [terms of service](#) and [privacy policy](#)



Data safety first!

Step 2. Connect Your Source and Target

The required access credentials vary depending on the customer service platform. This can include a URL, API token, or signing in with your source platform account and granting permission.

The Migration Wizard provides helpful tips to ensure you enter all required information in the correct fields.

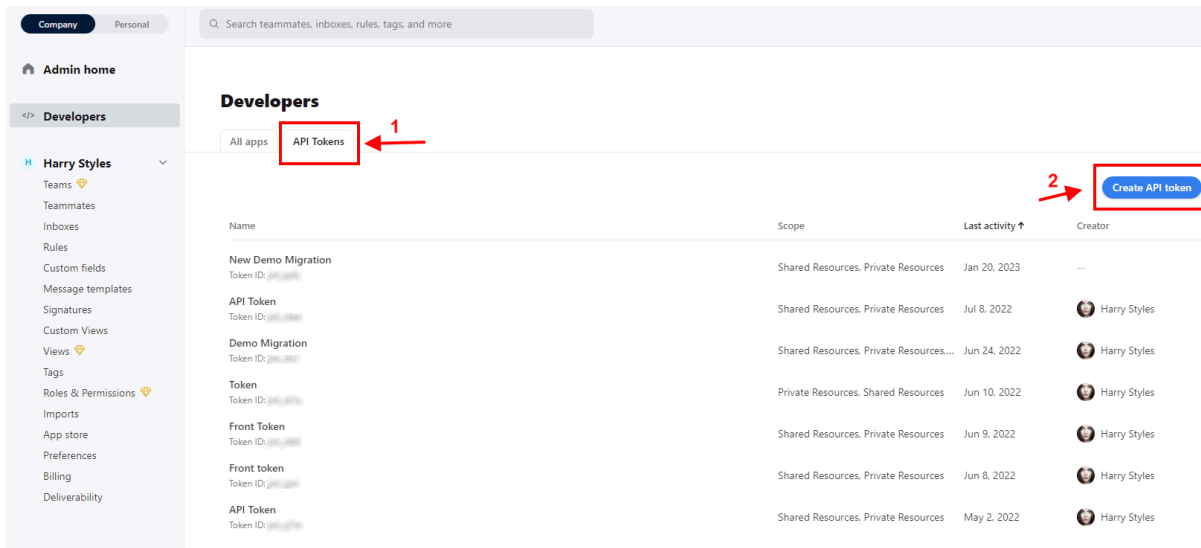
The image shows two screenshots from the migration process. The left screenshot is the 'MIGRATION SETUP' screen, which includes fields for 'From: ZENDESK', 'To: FRONT', and 'Migrate to: Front'. The right screenshot is the 'Zendesk connected' page, showing the 'Migrate to: Front' dropdown menu and the 'API Token' field. Red arrows point to the 'Migrate to: Front' dropdown, the 'API Token' field, and the 'Continue ..' button. A 'Chat' button is visible in the bottom right corner.

To get your Front API token, navigate to Front Settings > Developers.

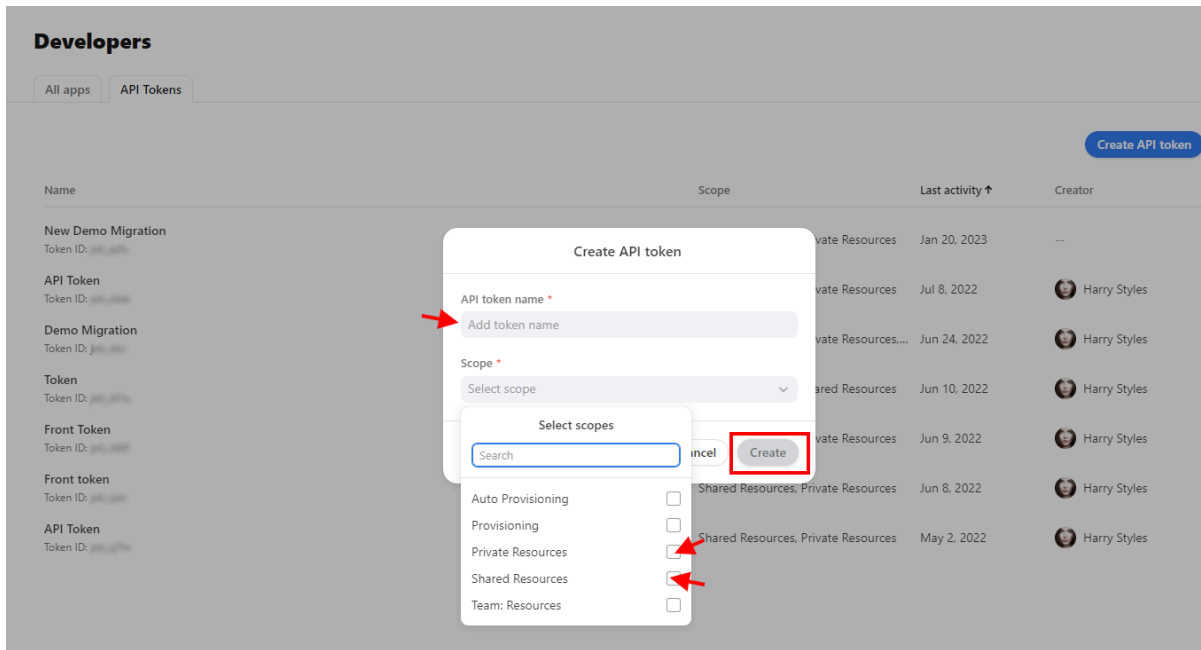
The image shows the 'Admin home' page in the Front interface. The 'Company' and 'Personal' tabs are visible at the top. The 'Admin home' section contains three main cards: 'Manage teammates', 'Manage inboxes', and 'Create rules'. Below these is a 'Learn how to...' section with three sub-sections: 'Speed up response times', 'Ensure emails are never missed', and 'Work as a team'. The 'Developers' menu item in the left sidebar is highlighted with a red box and a red arrow.



From there, go to API Tokens and click the Create API Token button.



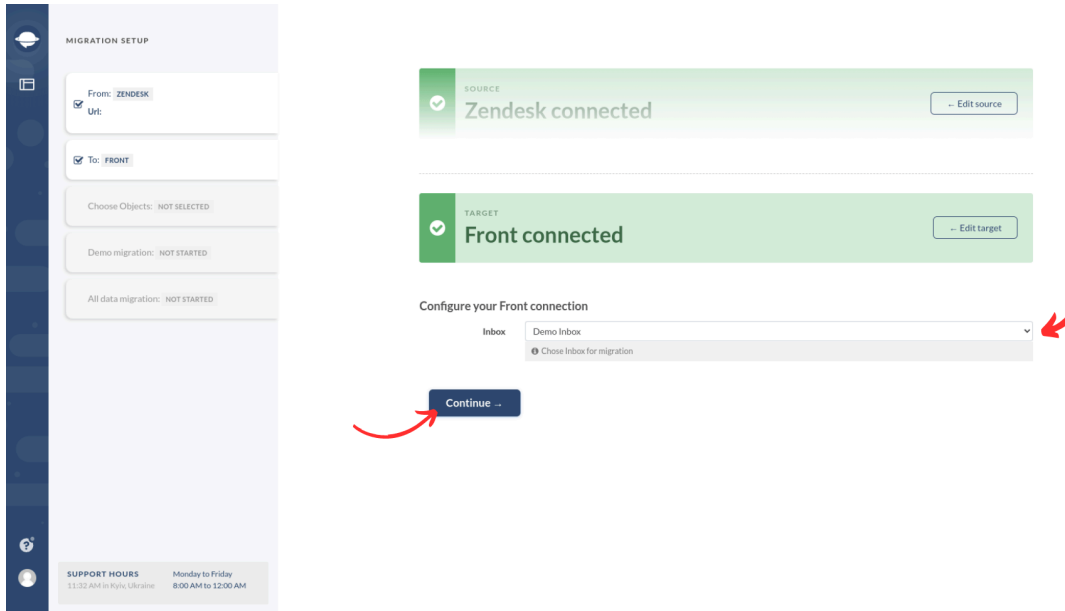
Fill in the API Token name and check both Shared and Private scopes options before clicking Create.



Your newly created API token will appear in the list of all available tokens. Click on it to view and copy the token, and then return to the Migration Wizard to continue the setup process.

Step 3. Select Front Inbox

Choose the Front inbox to which you want to import data from your source platform.



Keep in mind that you can only run one Full Migration per workspace/mailbox/inbox. If you need to migrate data to different inboxes, you'll need to set up as many Full Migrations as you have mailboxes.

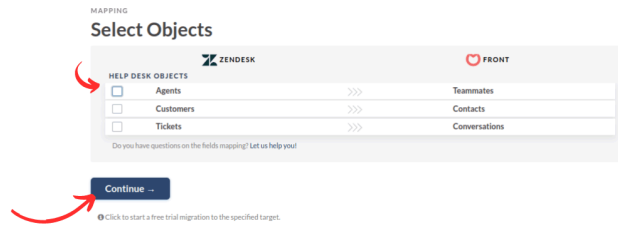
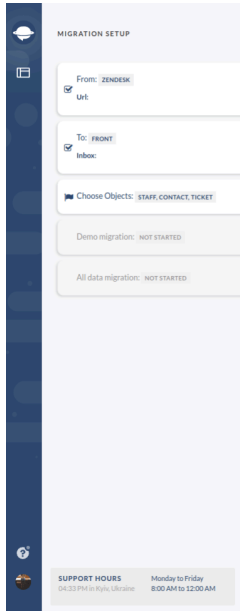
Depending on the source platform, you may need to filter the data on the source account and direct different data batches to different inboxes.

For instance, if you're migrating from Help Scout to Front, you won't need to filter the data to migrate tickets from one Help Scout mailbox to one Front inbox. The number of Help Scout inboxes equals the number of Full Migrations you must run.

However, if you're migrating from Zendesk to Front and want to move tickets from different Zendesk Brands into different inboxes, you must request custom data filtering to sort out your tickets by Brands. Our team can assist you with this process.

Step 4. Choose Migration Objects

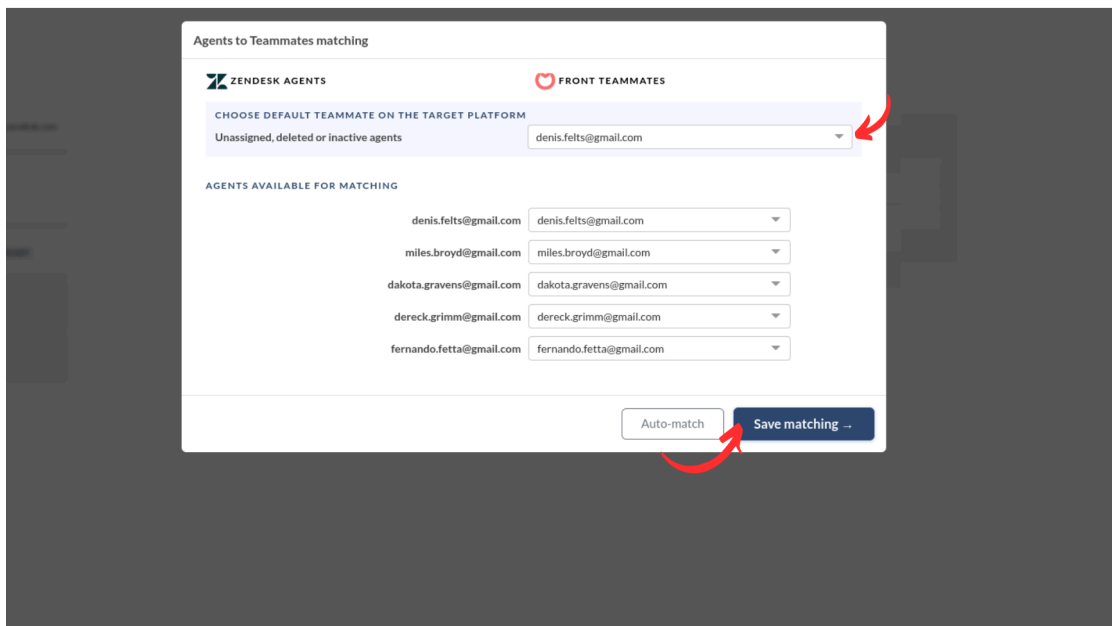
Select the data entities you wish to migrate to Front and proceed to match teammates and map fields between your source platform and Front.



Step 5. Match Teammates

Clicking 'Match items' between Agents and Teammates will display all the available agents for matching. If you have unassigned, deleted, or inactive agents, you can choose from available teammates the one who will serve as the default teammate and be associated with all the data.

Click 'Save matching' to continue with the data mapping step.

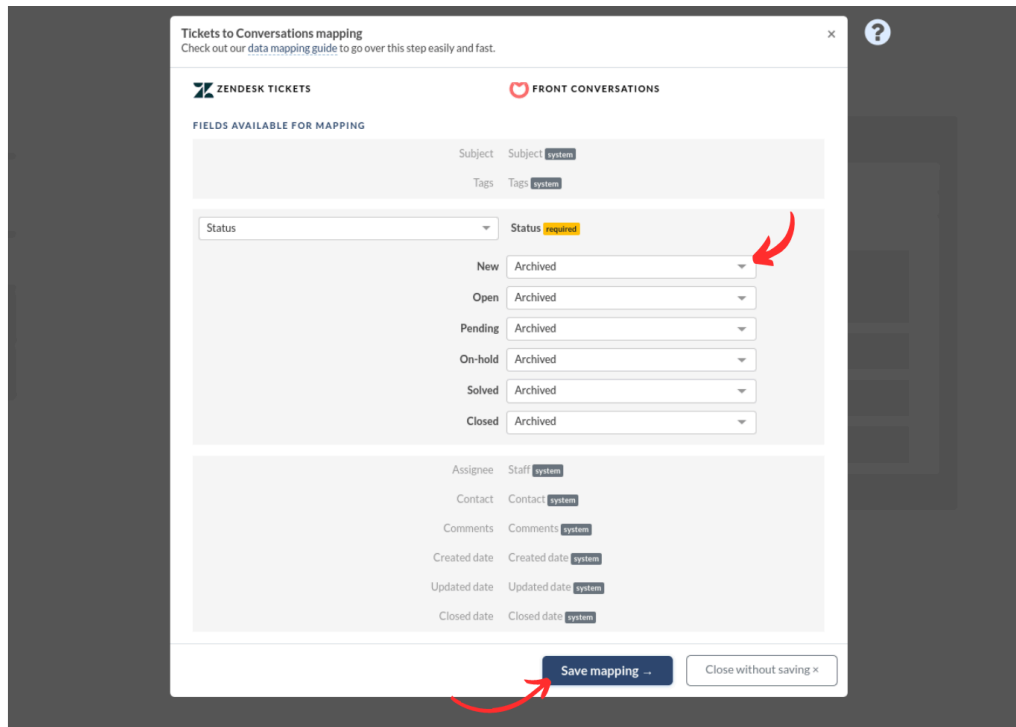


If you have made changes while re-running your Demo, use the 'Auto match' button to match teammates according to their names.

Step 6. Mapping Tickets

Selecting the ticket checkbox for migration will prompt a window for mapping ticket fields. Note that some system fields cannot be mapped differently, such as subject, tags, assignee, contact, comments, created, updated, and closed dates. Additionally, all private comments will bear the creation date identical to the migration date, resulting in the loss of original creation dates during the migration process.

You can map the ticket status field and choose from available statuses, such as assigned, open, or archived. After mapping the fields, click 'Save mapping' to proceed.



If you prefer to migrate tickets as unassigned, you will need to request customization to do so. To preserve the original statuses used in the source platform, we can add a tag with the status name. For instance, if there are tickets with a "Snoozed" status in the customer platform, we can add the tag "Snoozed" to those tickets during migration in a custom way.

To import information from ticket custom fields, we can migrate it to an additional internal comment. This way, all information from source custom fields, including the field name and the saved information, will appear in internal comments.



For example:

Reason for contact: Quote request;

Price:

Technical assistance required: No

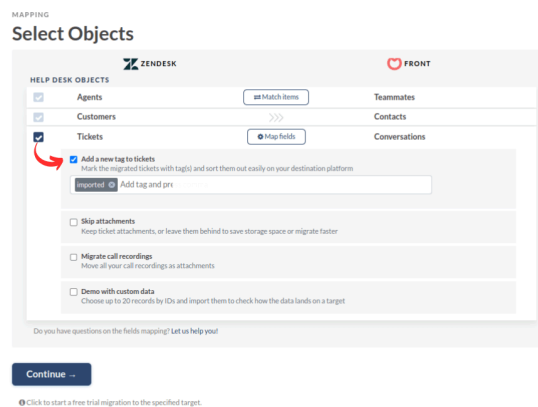
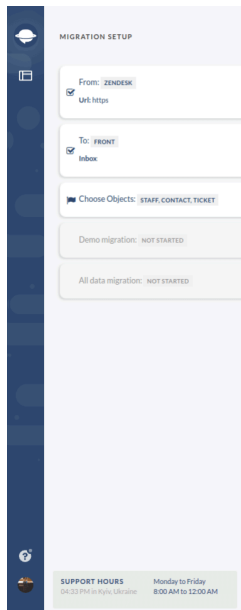
Step 7. Customization: Contact Custom Fields Import

The data entity of contact does not have a mapping option available. However, if your platform allows retrieval of information from custom contact fields, our team can migrate that information. To check if this is possible, please contact us at contact@relokia.com.

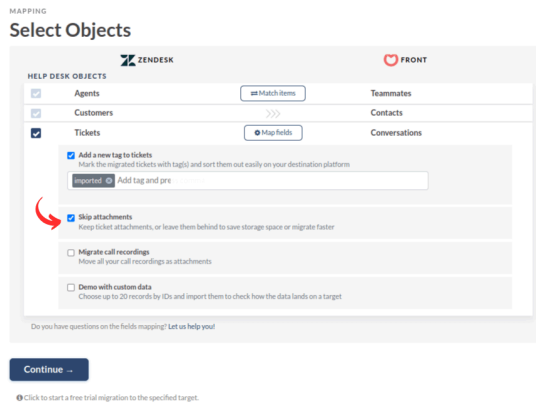
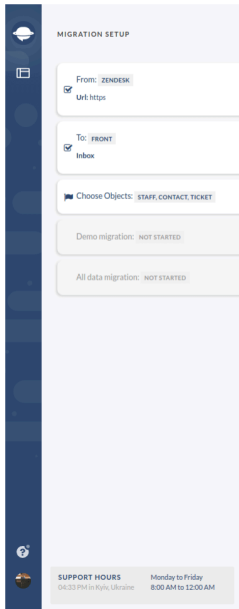
Step 8. Out-of-the-box Customization Options

Customize your migration process using the built-in options for ticket customization. The number of customization options available will depend on your source platform.

To better organize your migrated tickets, add a relevant tag to easily locate them within your Front inbox.

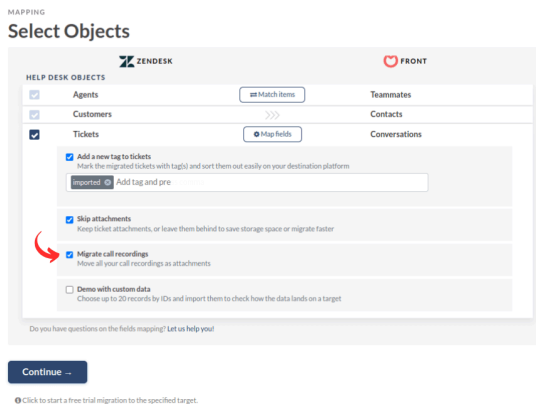
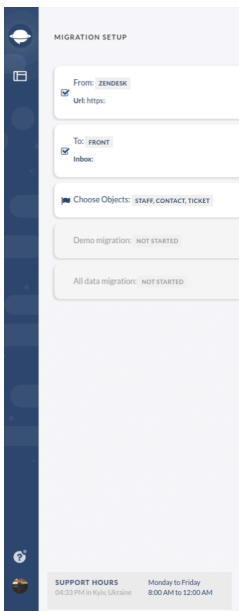


Optimize your migration: By default, we migrate all attachments, but if you want to save on storage or migrate faster, you can choose to leave them behind.

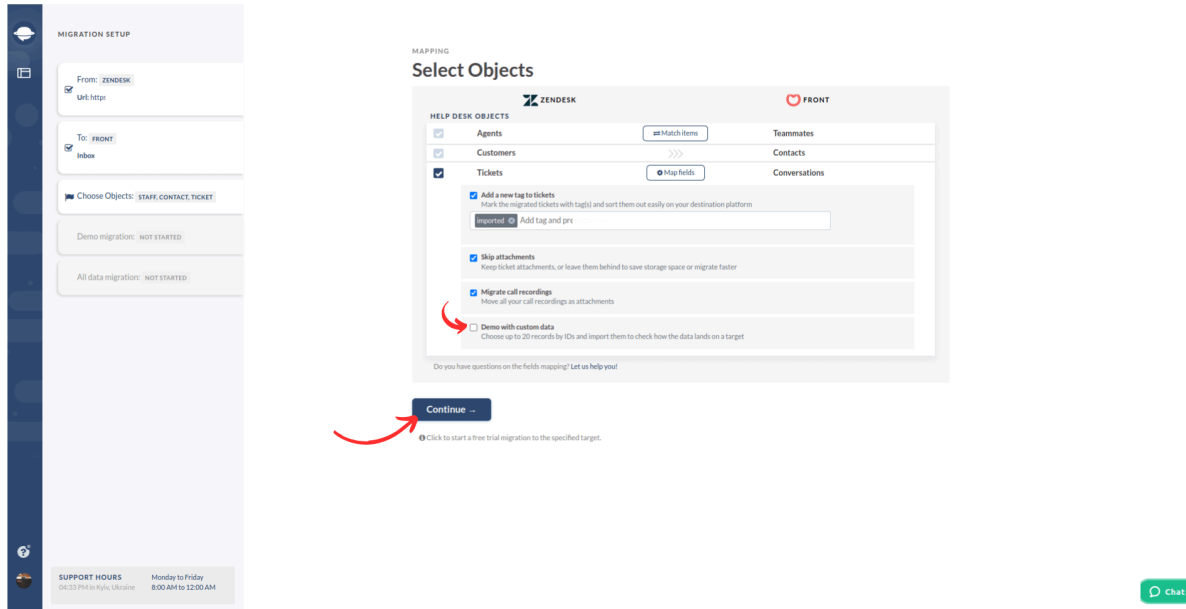


Inline images from most source platforms can be migrated as attachments but cannot be saved as inline images. To determine if inline images can be transferred as attachments, check the objects mapping page.

Access call recordings: Migrate your call recordings as attachments, making them easily accessible for future reference.



Customize your migration: Use our "Demo with custom data" option to choose up to 20 records by ID to import and see how the data appears on Front. You are in control!



Once you have finished matching and mapping, click the 'Continue' button. If you have any unsaved mapping or matching information, the Migration Wizard will show you the mapping window to review and save it.

Actions to Take After the Demo Data Migration

Assessing Demo Results

It's essential to examine the results of your Demo migration because the data that appears in the demo will also migrate during the full migration. To ensure accuracy, check the records available for migration to Front in the table.



Demo is complete

Help Desk records	Available	Migrated	Failed	Skipped
Teammates	14	15	0	0
Contacts	144	7	0	0
Conversations	105	20	0	0


[Rollback Demo](#)


[Continue >](#)

Feeling unsatisfied with your results? Let us help you!

Open the report for each entity and verify that the migration is correct on both the source and Front instances by reviewing the records by IDs.

Explore the Migrated Teammates Report

 ORIGINAL RECORDS

 MIGRATED RECORDS

default_id	tea_clsie
393588259920	tea_clsie
19884211902994	tea_clsie
19884218859410	tea_clsie
19884235315986	tea_clsie
19891795307026	tea_clsie
19891821291026	tea_clsie
19891821377042	tea_clsie
19891846653330	tea_clsie
19891846742418	tea_clsie

Find the source platform records IDs in the ORIGINAL RECORDS column and their corresponding IDs on the target platform in the MIGRATED RECORDS column. For platforms with ID-based URLs, simply click on the (open) to view it directly. If not, just use platform's search function to locate the record by it's ID.

<< 1 2 >> [Close](#)

What to Look for When Checking Migrated Records

- All comments got migrated, and if the authors of the comments are the same



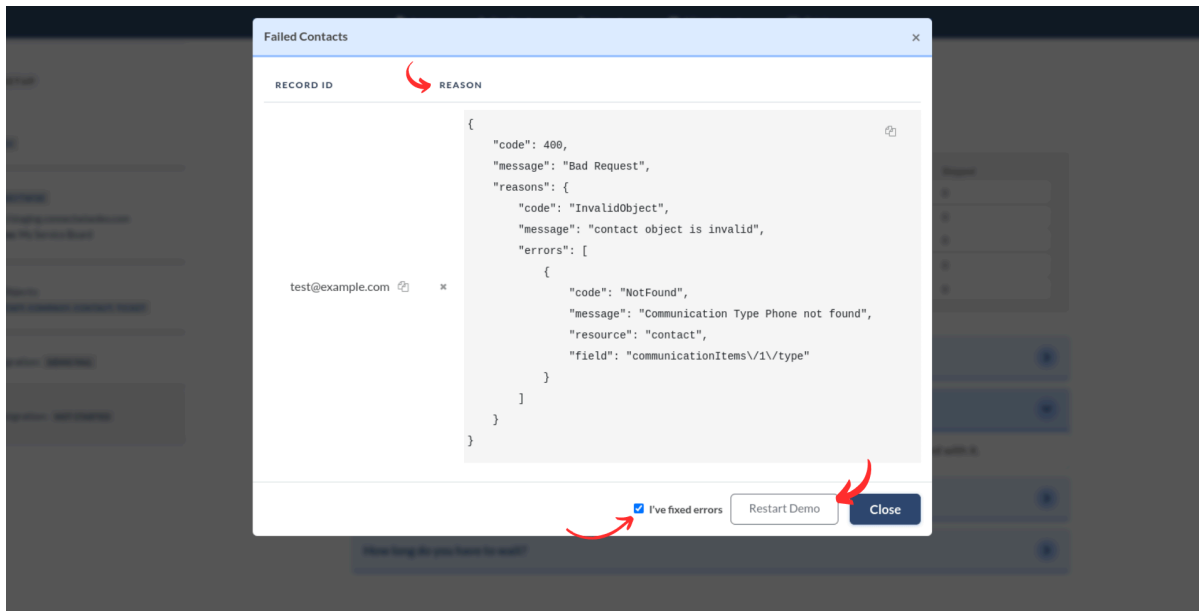
- The tickets are assigned to the correct teammates
- The contacts migrated correctly
- Attachments migrated along with the labels
- The automation rules did not update any of your Demo data

Handling Suspended Demos

If your Demo migration is suspended, there are two possible reasons: [failed and/or skipped records](#).

For skipped records, it's best to wait for our support team to reach out and assist you in resolving the issue.

If you notice failed records in your Demo migration, review the record IDs to identify the reasons for the suspension and take the necessary action to fix the problem.



Once you've addressed the errors, check the box labeled 'I've fixed errors' and hit the 'Restart Demo' button to get your migration back on track.



Choosing the Right Support Package

Personalize your data migration to Front by [selecting a fitting support package](#) that best suits your needs.

<input type="radio"/> STANDARD(FREE) <ul style="list-style-type: none">✓ 9/5 via email, phone & chat✓ Regular SLA response time (within 24 hours)✗ Dedicated support on weekends✗ Data re-migration✗ Interval migration✗ Delta migration✗ Skipped/failed records check and migration	<input type="radio"/> PREMIUM(+\$245) <ul style="list-style-type: none">✓ 16/5 on weekdays and 8 hours on weekends support via email, phone & chat✓ High priority response time✓ Dedicated support on weekends✓ 1 data re-migration within 5 days✗ Interval migration✗ Delta migration✗ Skipped/failed records check and migration	<input checked="" type="radio"/> SIGNATURE(+\$500) <ul style="list-style-type: none">✓ 16/5 on weekdays and 8 hours on weekends support via email, phone & chat✓ Highest priority response time✓ Dedicated tech support on weekends/holidays✓ 1 data re-migration within 10 days✓ Interval migration✓ 1 Delta migration within 10 days✓ Skipped/failed records check and migration
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Among the benefits of the Signature package that need more detailed explanation are

- [Data remigration](#) within 10 days after your Full Migration was completed.
- [Interval migration](#) allows you to pause your help desk data migration during the workweek and resume it on weekends or with any other scheduling that best suits your business needs.
- [Delta migration](#) allows you to remigrate the updated tickets and knowledge base articles and also migrate those created during the Full migration.

If you continue working on the source platform and then do the Delta migration right after the switch, the tickets that were migrated in the first migration and updated in the source platform will be duplicates.

Delta migration allows you to update your existing data in Front without deleting previously imported tickets. Once the delta migration is complete, however, you will need to manually delete the outdated tickets. Migration Wizard doesn't remove any tickets during the delta migration; it simply updates their status to Deleted.

That's why our Help Desk Migration team will provide you with a list of these tickets for easy removal. This streamlined process ensures that your data remains up-to-date and clutter-free, saving you time and effort in the long run.

- Skipped/failed records check for custom migration.

Price Breakdown and Payment

If you have any questions about the Full migration price, be sure to check the price breakdown for a detailed and transparent explanation.



Checkout Migration ✕

STANDARD (FREE)

- ✓ 9/5 via email, phone & chat
- ✓ Regular SLA response time (within 24 hours)
- ✓ Skipped/failed records check and migration
- ✗ Dedicated support on weekends
- ✗ Data re-migration
- ✗ Interval migration
- ✗ Delta migration

PREMIUM (+\$200)

- ✓ 16/5 on weekdays and 8 hours on weekends support via email, phone & chat
- ✓ High priority response time
- ✓ Dedicated support on weekends
- ✓ 1 data re-migration within 5 days
- ✓ Skipped/failed records check and migration
- ✗ Interval migration
- ✗ Delta migration

SIGNATURE (+\$500)

- ✓ 16/5 on weekdays and 8 hours on weekends support via email, phone & chat
- ✓ Highest priority response time
- ✓ Dedicated tech support on weekends/holidays
- ✓ 1 data re-migration within 10 days
- ✓ Interval migration
- ✓ 1 Delta migration within 10 days
- ✓ Skipped/failed records check and migration

Order Details

+ Records price	\$48 ⁰⁰
+ Custom options price	\$36 ⁰⁰
+ Support package price	\$0 ⁰⁰
Grand Total	\$84⁰⁰
Total Paid	\$84 ⁰⁰

I have a coupon

Close ✕

When you're ready, proceed to payment by filling in your billing information and clicking 'Submit order.'

1 Products
 2 Finish Order

English
USD

Billing Information ⓘ

Business purchase

*E-mail **

*First name ** *Last name **

*Full address **

*City ** *ZIP **

United States of America

Alabama

Phone number ?

License to another person

Credit/Debit Card

*Card number **

01 31 *Security code ** ?

You're Buying

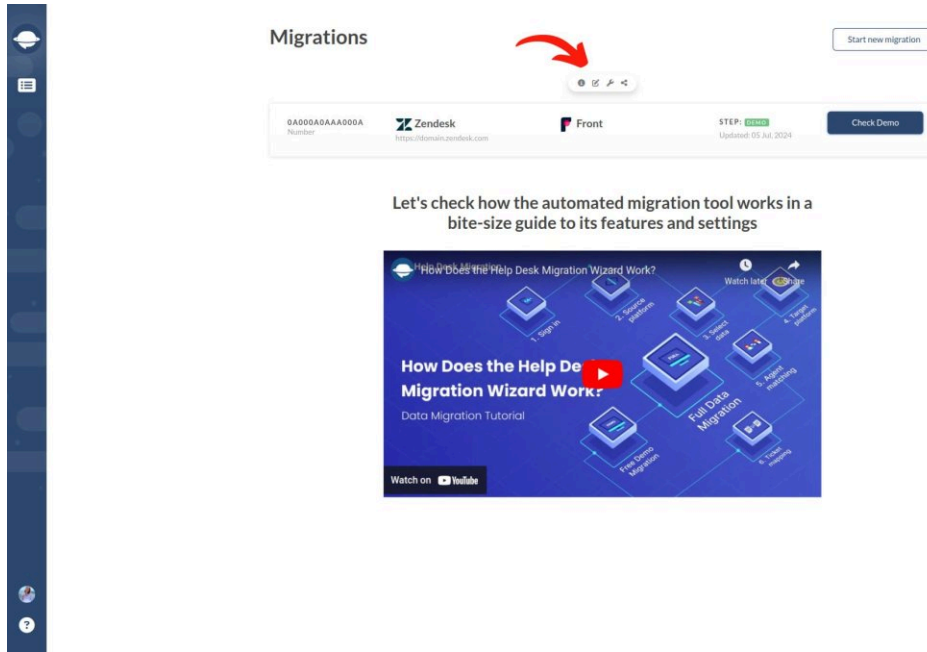
Data migration from Zendesk to Front
123.00 USD

TOTAL: 84.00 USD

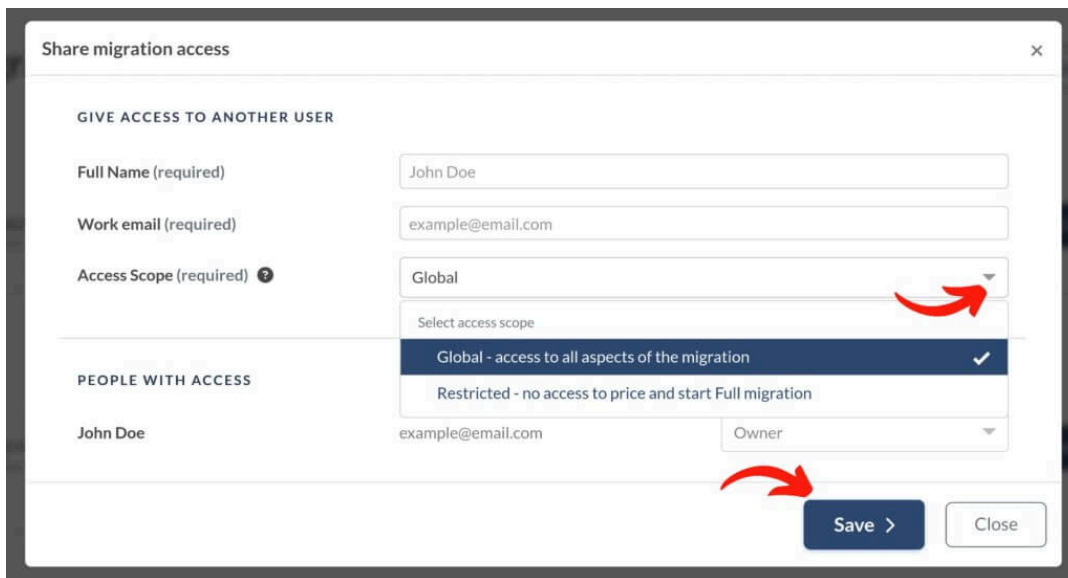
Submit order

Grant Access to Your Colleague and Customize the Migration Name

If you need to make changes or want a quick check-up from a colleague, you can [share your migration](#).



You can grant your colleagues access and choose the level of access they will have.



If you have multiple Full Migrations, consider [giving a custom name](#) to each data migration for easy identification.

Migrations

Your migration label Done

Start new migration

0A000A0AA000A
Number

Zendesk
https://domain.zendesk.com

Front

STEP: 0/1000
Updated: 05 Jul 2024

Check Demo

Let's check how the automated migration tool works in a bite-size guide to its features and settings

How Does the Help Desk Migration Wizard Work?
Data Migration Tutorial
Watch on YouTube

Start Full Data Migration

Once your payment is confirmed, you will be redirected back to the Migration Wizard.

Avoid making last-minute changes to prevent any suspension of your migration and delay in the process. If you are ready to initiate your Full Migration to Front, you may do so immediately.

DATA MIGRATION PREVIEW

Demo is complete

Help Desk records	Available	Migrated	Failed	Skipped
Teammates	14	15	0	0
Contacts	156	7	0	0
Conversations	105	20	0	0

Rollback Demo

Start full data migration >

Order details

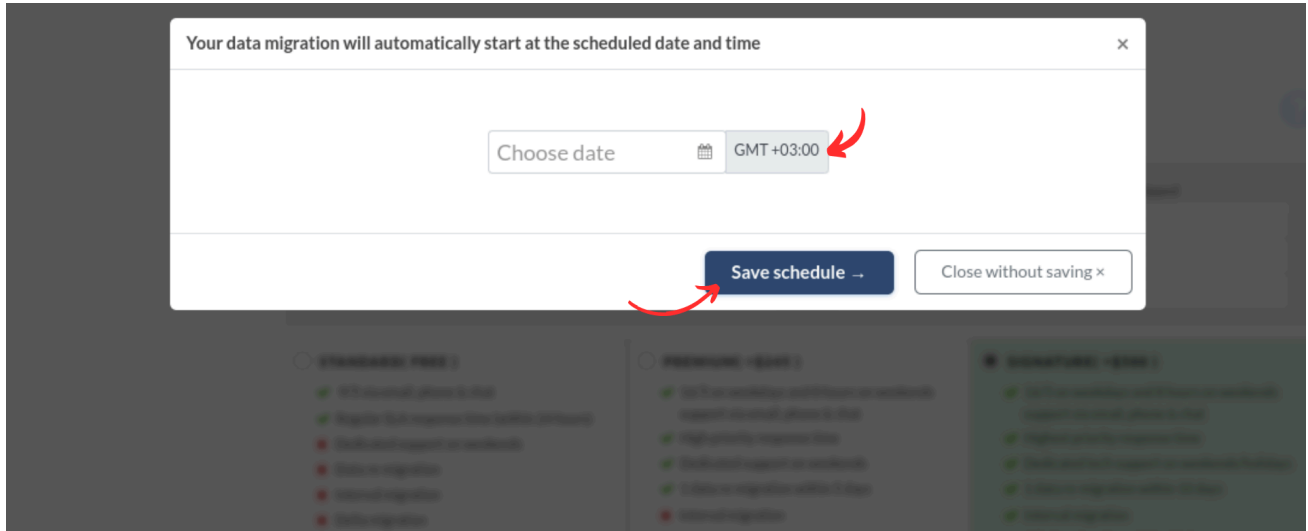
Schedule start

Alternatively, you can schedule it conveniently by selecting the date and time and clicking 'Save schedule.'



Help-Desk-Migration.com

contact@help-desk-migration.com



The duration of your Full Data Migration will depend on the number of records being imported. Typically, 2000 tickets can be imported per hour. If you wish to expedite the process, request an increase in the number of API requests from both your source vendor and Front. Please notify us of any changes before starting your Full Data Migration to ensure a seamless transition.

Our dedicated support team is always available to assist you should you encounter any issues or have any questions.

After the Full Data Migration is Done

Check the Results

After the Full Data Migration, review your Front account closely to ensure all records were transferred correctly. You have five days for this check, and the duration may vary depending on your support package.

By default, Front shows all the tickets in the Inbox where you've imported all your data. To view them, go to the Inbox. There, you'll view tickets divided into tabs by status: Open, Archived, Trash, and Spam. Plus, you can filter every tab by Tags and Assignee.

If you're missing something, ensure your ticket filters and time settings are correct. If the issue remains, contact our support team.

Set up Front

1. Activate two-factor authentication (2FA) in Front.
2. Turn on all communication channels.
3. If you used your old platform during migration, re-forward emails to Front. If you switched to Front during migration, you're all set.



WHY MIGRATE 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 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 of it

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



LOOKING FOR MORE DATA MIGRATION DETAILS?

Let's talk now

