



Help Desk Migration

GORGIAS DATA MIGRATION CHECKLIST



Table of Contents

BEFORE YOU SET UP THE MIGRATION	3
1. CHOOSE A DATE FOR MIGRATION	3
2. SPEAK TO YOUR TEAM	3
3. CONSIDER THE PECULIARITIES AND LIMITATIONS OF GORGIAS	3
4. CONSIDER POPULAR CUSTOMIZATIONS	4
YOU'RE ALMOST READY	4
1. DISABLE RULES	4
2. FIND ACCESS CREDENTIALS	5
3. RUN A DEMO MIGRATION	5
AFTER THE DEMO MIGRATION	5
1. CHECK THE RESULTS IN GORGIAS	5
2. REQUEST A CUSTOM DEMO	6
BEFORE THE FULL DATA MIGRATION	6
1. CHOOSE MIGRATION OPTIONS	6
2. START THE FULL DATA MIGRATION	6
3. DON'T CHANGE ANYTHING	6
AFTER THE IMPORT IS DONE	7
1. EXAMINE EVERYTHING	7
2. SET UP A NEW PLATFORM	7
WHY MIGRATING WITH US	8



When you decide switching your help desk system, be ready to make a plan. That's why our team has prepared a Gorgias migration checklist so you don't have to.

Before you start, note that Migration Wizard doesn't import the following records to Gorgias in a default migration:

- Organizations
- Groups
- Inline Images
- Knowledge Base Articles
- Knowledge Base Attachments
- Custom Fields
- CC in Tickets
- Attachments that are larger than 10 MB

If you still want to migrate the listed data, [reach out to our support team](#).

BEFORE YOU SET UP THE MIGRATION

1. CHOOSE A DATE FOR MIGRATION

Choose a date for data migration to give yourself enough time to prepare for the transfer thoroughly. And pick up the day with the smallest amount of help-desk-related work.

2. SPEAK TO YOUR TEAM

Let your agents know about the upcoming changes so they have enough time to adjust to Gorgias. Delegate responsibilities. Your team can help you examine the **Full Data Migration** results.

3. CONSIDER THE PECULIARITIES AND LIMITATIONS OF GORGIAS

- If your tickets have more than 30-40 comments, you are highly recommended to run a custom migration.



- The updated date will be considered the date of the migration.
- You can change the updated date of the already migrated tickets by renewing the ticket update time after the creation of comments.

4. CONSIDER POPULAR CUSTOMIZATIONS

If you have any specific requirements for data migration, [contact our support team](#). We offer an option like

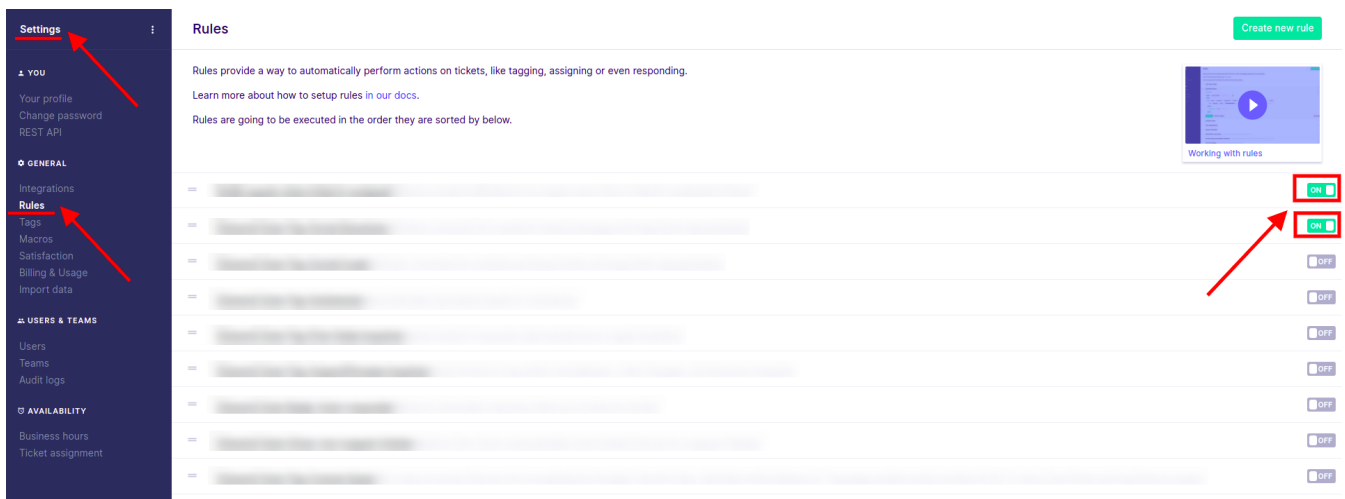
- Data filtering by different criteria (creation date, tags, custom fields, organizations, assignees)
- Change of the default migration process (migration of ticket events as private notes, migration of the information related to inactive users, etc.)
- Migration of the information from the integrations (migration of linked Jira task ID or URL)
- Adding information to the migrated data (marking tickets with extra tags, email addresses of CC users into a first private note)

YOU'RE ALMOST READY

1. DISABLE RULES

To avoid changing ticket statuses during migration, disable rules in Gorgias before starting migration.

Go to **Settings** > **Rules** > check what rules are 'On' > disable them by clicking the toggle.



2. FIND ACCESS CREDENTIALS

When initiating your Free Demo, you need admin access credentials to the source help desk and Gorgias.

Here is a list of data you need to connect Gorgias to the Migration Wizard:

1. **URL:** URL of your company's Gorgias account.
2. **Email:** Settings > REST API > Username (your email address).
3. **API Key:** Settings > REST API > Password (API Key)

3. RUN A DEMO MIGRATION

Test the service with the [Free Demo Migration](#). Migration Wizard transfers a sample of data to Gorgias so you can check records on a platform and figure out whether you need some adjustments of the default workflow.

1. Sign in to your Migration Wizard account.
2. Connect your source and target platform.
3. Choose the data you want to import.
4. Match [agents](#).
5. Map tickets.
6. Select [automated options](#).
7. Initiate your Free Demo Migration.

Note: You can edit your Demo settings and run test import to Gorgias several times. But note if you have the same setting, then results of the second, third, etc. Demo will be the same.

AFTER THE DEMO MIGRATION

1. CHECK THE RESULTS IN GORGIAS

Once your Demo Migration is complete, check the results and download reports on migrated, failed, and skipped records.



What to look at while you are checking migrated records?

- all the comments got migrated, and the authors of the comments correspond in your source platform and Gorgias
- the tickets are assigned to the correct agents
- the customers and the attachments migrated correctly

For more details, read a detailed guide on [checking the results of demo migration in Gorgias](#).

2. REQUEST A CUSTOM DEMO

If you tried our one-time Demo Migration and still need to test specific data importing, you can request a Custom Migration, and our team will set up a tailored Demo. Contact us to discuss your requirements.

BEFORE THE FULL DATA MIGRATION

1. CHOOSE MIGRATION OPTIONS

During the Full Data Migration, you can work on your source help desk. However, Migration Wizard won't migrate any data updates or new records appeared during the transfer. To import these records, you can apply [Delta Migration](#). Or the second option is working with Gorgias with disabled Rules.

As the **Full Data Migration** runs in cloud so you can check the progress from time to time or wait for our team to contact you.

Note: Delta Migration is a feature of [Signature support plan](#). You can't buy it separately.

2. START THE FULL DATA MIGRATION

As soon as you click on **Start**, the **Full Data Migration** begins only begins if:

- **The payment has been confirmed.** Pay in advance, especially if you have a definitive time when you want to start. Or schedule the migration to run automatically based on that timing.
- **You've agreed to the provided checklist.** Go through each point, and check the corresponding box.

3. DON'T CHANGE ANYTHING

Resetting API key or deleting the source data can cause your data migration to fail.



AFTER THE IMPORT IS DONE

1. EXAMINE EVERYTHING

When the Full Data Migration is complete, you still have a job to do. First, inspect if everything migrated correctly. According to the service SLA, you have five days to check the results until your data migration gets archived.

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

2. SET UP A NEW PLATFORM

- Enable all the Rules you had to turn off before the migration process
- Redirect email forwarding
- Switch on all communication channels



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

