



Help Desk Migration

GROOVE DATA MIGRATION CHECKLIST



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Data migration is a crucial process that demands careful planning and effort. To streamline this task, we have created an exclusive step-by-step migration checklist designed specifically for Groove users.

Note that the Migration Wizard does not transfer the following types of records to Groove:

- Organizations
- Knowledge Base (KB) attachments
- Custom Fields
- CC in Tickets

[Request a custom data migration](#) if you consider moving the listed entities to Groove.

BEFORE YOU SET UP THE MIGRATION

Note: Tickets and related records move in a similar manner during both the Demo Migration and Full Data Migration. If any data wasn't successfully transferred during the Free Demo, it will not be included in the Full Data Migration.

After completing the Demo Migration, it is essential to download reports on migrated, skipped, and failed records. Subsequently, verify that every record type has been transferred accurately. If any questions or concerns arise, please don't hesitate to contact our migration experts.

1. SELECT A MIGRATION DATE

Your team requires ample time to prepare for the migration. This includes closing outstanding tickets and acquainting themselves with the new platform.

2. SPEAK TO YOUR TEAM

Ensure your agents are well-informed about the data import to Groove. Distribute specific responsibilities among your agents, who can then review the results following the Full Data Migration. Additionally, send a reminder about the data migration to all your employees before initiating the Groove import.

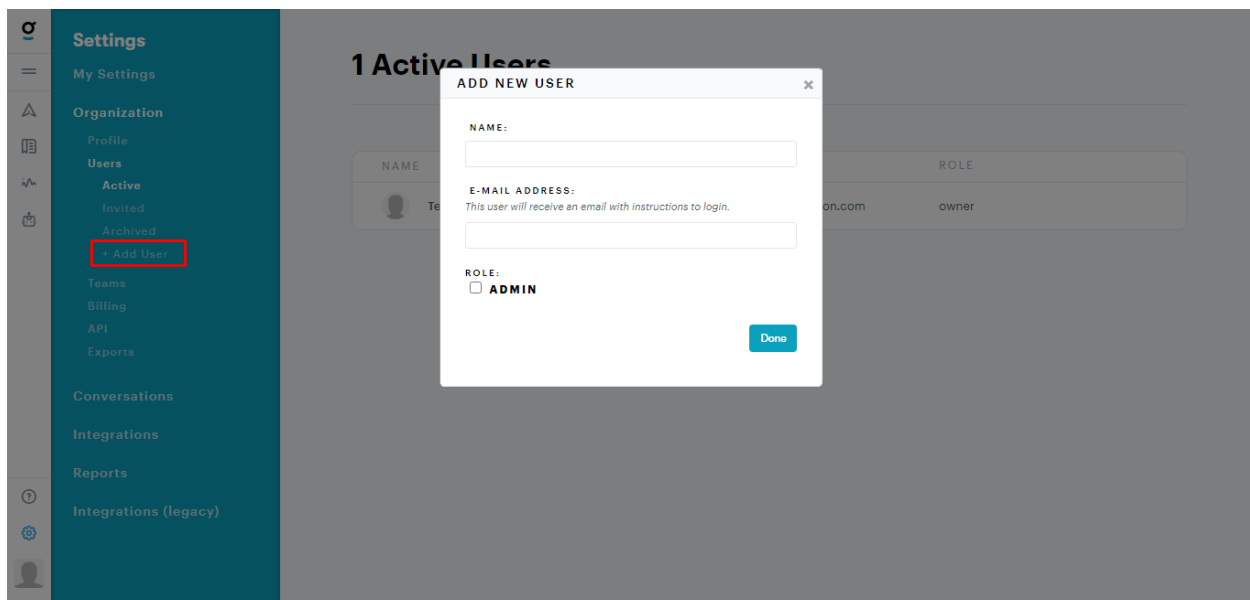
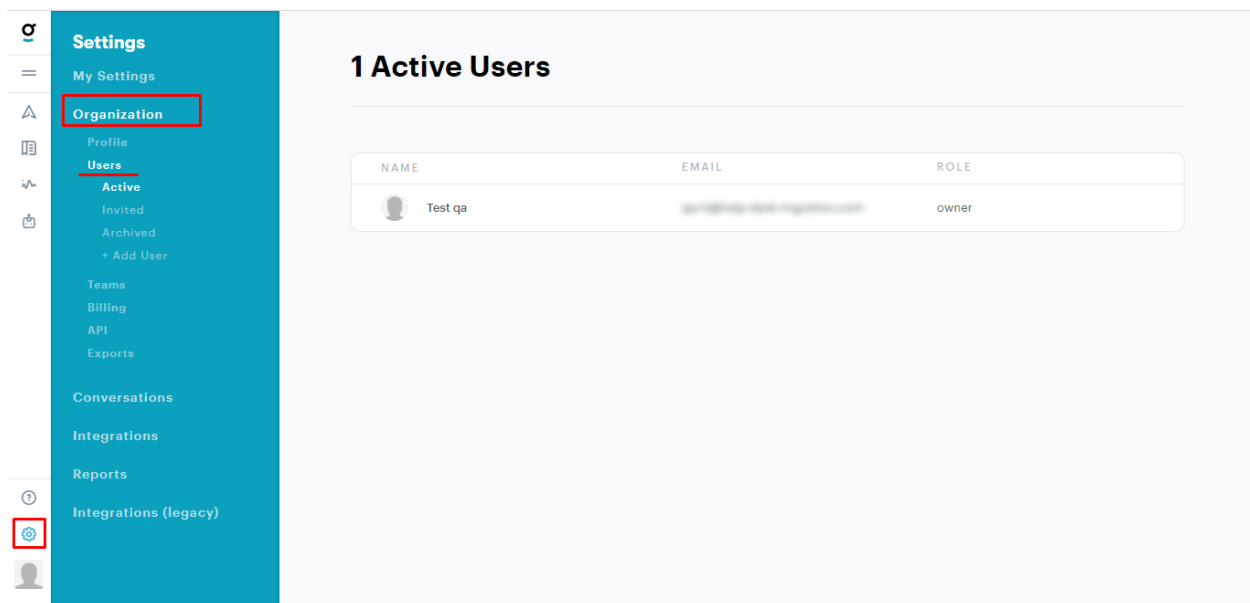


3. PREPARE GROOVE FOR THE TRANSFER

1. **Adding Users.** Before migrating, manually create agents in Groove by following these steps:

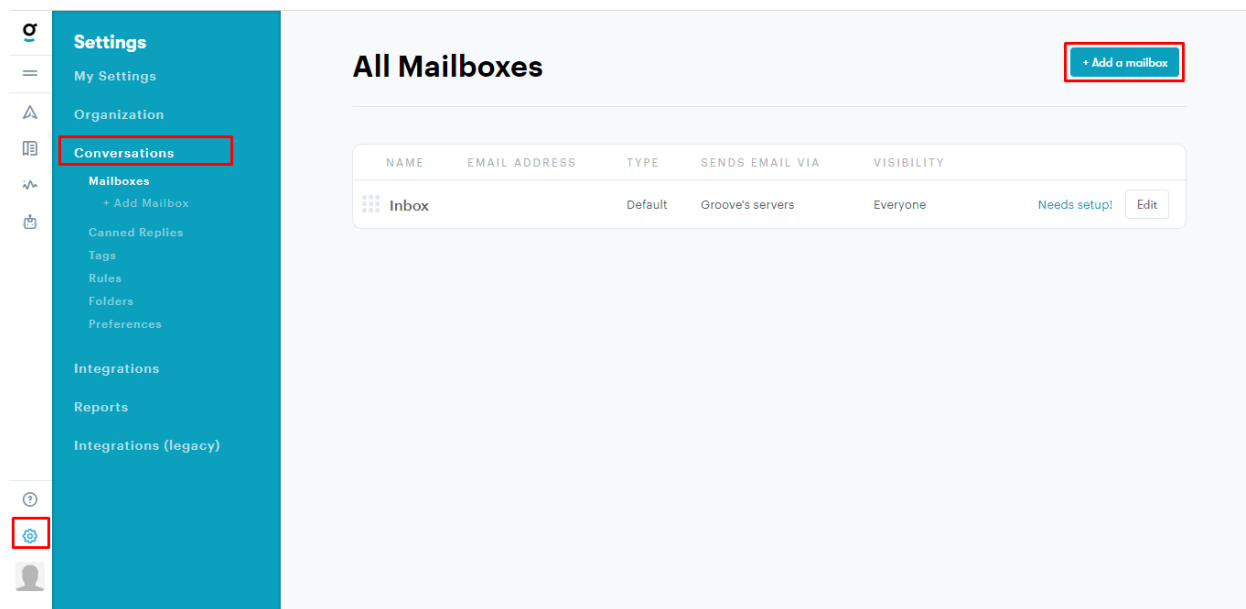
Navigate to Settings. Click on Company, then select Users and click on the + Add user.

Note: Remember to provide the user's name and email address and assign their role. Ensure that the email addresses match those in the source help desk.



2. **Setting up Mailboxes.** To create mailboxes, follow these steps:

Go to **Settings**, choose **Conversations**, click on the **+ Add Mailbox** option.



4. CONSIDER THE PECULIARITIES AND LIMITATIONS OF GROOVE

Before making the switch to Groove, take a closer look at the specificities:

- When more than two agents have left ticket comments, these comments will be displayed slightly differently. The ticket requester's comments will appear as they were in the source. However, comments from all other contacts will be shown as originating from the ticket assignee.
- If the agent is not created on Groove, all of the replies will be shown from the assignee's name. In case, both ticket's requester and assignee are not created on Groove, the replies will be displayed from the name of the default agent.
- Note that if you have base64-format images in your Knowledge Base articles, they will not be migrated to Groove.
- It's essential to create agents before initiating the Demo Migration.
- Data migration can only be performed to a single mailbox, so you'll need to map it to a constant value and select the desired mailbox from the list.
- In the case of attempting to connect to a different Groove account, the OAuth token does not automatically reset. You can either delete the token on our side or start a new Demo.

5. SELECT CUSTOMIZATION OPTIONS

If you have specific requirements for data migration, [contact our support team](#). We provide the following customization options:

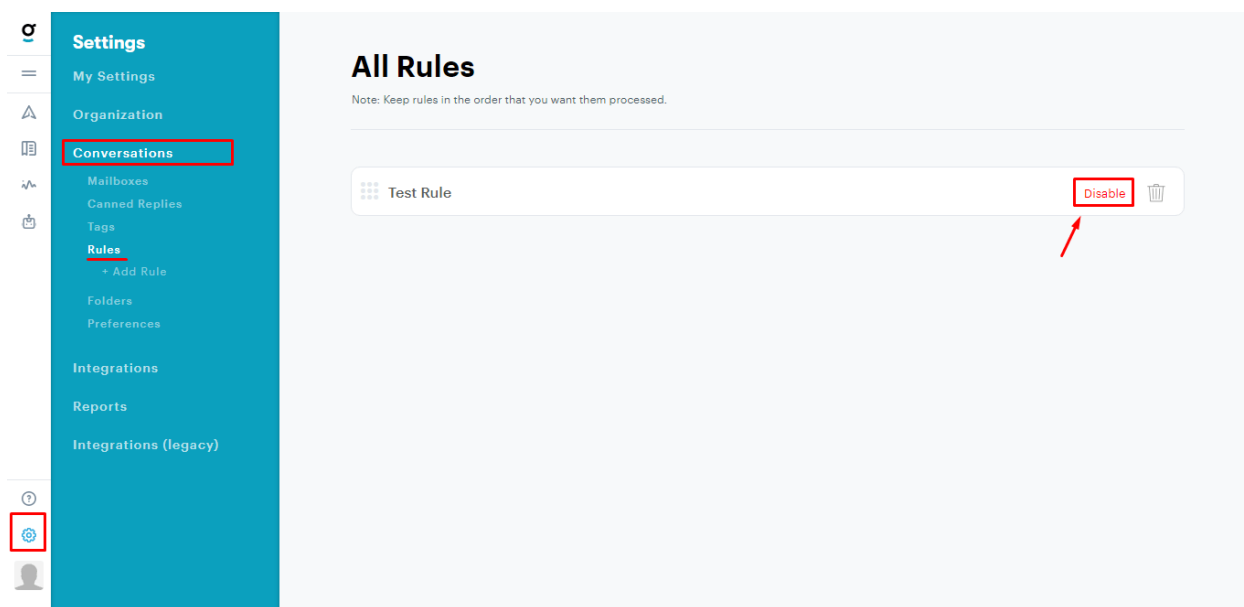
- Data filtering based on various criteria (creation date, tags, custom fields, assignees, etc.)
- Adjustment of the default migration process, such as adding the end-user's name who left the comment in the comment body or migrating custom fields into a private note, among other possibilities

YOU'RE ALMOST READY

1. DISABLE AUTOMATIONS

To disable Automations (if you have any).

Go to **Settings** > under **Conversations**, select **Rules**, and click the **Disable** button.



2. FIND ACCESS CREDENTIALS

To begin a Demo Migration, you'll need access credentials for both the source platform and Groove.

To connect Groove with the Migration Wizard, please provide the following:

- **URL:** The URL for your company's Groove account, formatted as <https://domain.groovehq.com/>.
- **OAuth authentication:** Log in using your Groove account.

3. RUN A DEMO MIGRATION

With the Free Demo, our Migration Wizard will effortlessly transfer 20 random tickets from your current help desk system to Groove. You can repeat this process as many times as necessary, making adjustments to the settings as needed. Running multiple Demo Migrations with the same settings will yield consistent results.

1. Log in to your Migration Wizard account.
2. Connect your source and target platforms.
3. Select the data you want to import.
4. Match [groups and agents](#).
5. Map tickets and articles.
6. Define the needed [automated options](#).
7. Start your Free Demo Migration.

Note: the availability of automated options may vary depending on your source platform.

AFTER THE DEMO MIGRATION

Review the table displaying migrated, failed, and skipped records, and download reports to thoroughly inspect the migration results. Please focus on the following key aspects:

- Ensure that all comments have been successfully migrated, and verify whether the authors of the comments remain consistent.
- Confirm that the tickets have been assigned to the appropriate agents.
- Verify the accurate migration of customers and companies.
- Check if the attachments have been successfully transferred.

Note: It is essential to thoroughly examine the integrity of the imported attachments. Download them from your destination platform to ensure they were migrated correctly.



If you encounter any skipped records, do not hesitate to reach out to our support representatives. For more comprehensive guidance on assessing the results of the demo migration, please refer to the [detailed guide](#).

BEFORE THE FULL DATA MIGRATION

1. CHOOSE YOUR MIGRATION WAY

During Full Data Migration, you can continue using your source platform and target system simultaneously.

If you continue working with the source system, any newly created or updated tickets or articles during the Full Migration won't be imported. In such cases, you can opt for the Delta Migration to import them at a later time. Please note that the [Delta Migration](#) option is exclusively available in the [Signature support plan](#).

Throughout the Full Data Migration process, you can conveniently monitor the progress on your migration page within the Wizard at any time. Alternatively, you can await our support representatives to reach out to you.

2. START FULL DATA MIGRATION

The Migration Wizard processes each customer record individually. The duration of the import process can vary, taking anywhere from 20 minutes to several days based on the volume of your help desk records.

To kick off the Full Data Migration, ensure that you've check the important migration notes that can be found in the sidebar on the left. Additionally, please wait for confirmation of your payment. This may take some time, so consider making the transaction in advance or scheduling the data migration.

To speed up your Full Data Migration, you can request Groove to temporarily increase API limits.

AFTER THE IMPORT IS DONE

1. REVIEW EVERYTHING

After completing your Full Data Migration, it's essential to thoroughly inspect the results to ensure that your data has migrated correctly. Be sure to perform this review within the first five days following the Full Data Migration. After this five-day window, the Migration Wizard will archive your migration.



If you encounter difficulties locating any specific records, double-check if you've configured the necessary search filters for all tickets and timeframes. If you still can't find the required data, don't hesitate to [start a chat with our migration experts](#).

2. CONFIGURE A NEW PLATFORM

- Activate Notifications
- Enable Automations
- Redirect Emails to Groove
- Activate all Communication Channels
- Update the links in the Knowledge Base



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 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 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).



Help-Desk-Migration.com

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LOOKING FOR MORE DATA MIGRATION DETAILS?

Let's talk now

