HALO PSA

DATA MIGRATION
CHECKLIST

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[Halo PSA data migration](#) seems complicated, but with a well-organized checklist, it becomes manageable. With the Help Desk Migration service, your transfer to Halo PSA goes without downtime or coding.

WHAT MIGRATION WIZARD WILL IMPORT TO HALO PSA:

Entity	Related records
Tickets	• Dates (Created at, Updated at, and Closed at) • Custom fields • Attachments • Inline images • Requesters • Comments (Author, Created dates, and Visibility) • Public notes • Private notes
Contacts	
Agents	
Organizations	
Groups	
Articles	• Attachments • Tags • Inline images • Top level FAQ Lists • Low level FAQ Lists

Note: Double-check you have admin rights on your source and target platforms. And, create agents, groups, and custom fields in your Halo PSA before creating a Demo Migration.

WHAT DATA WON'T BE TRANSFERRED

Our automated data migration tool can't import ticket tags, custom fields for organization and contacts, macros, triggers, automation, and other settings.

Have specific needs for Halo PSA data migration? Share your requirements with our tech team and we'll create a customized migration plan for you.

BEFORE YOU START DATA MIGRATION

For a successful data replication to Halo PSA, follow these steps.

DATA MIGRATION PROCESS PLANNING

Every help desk migration is special; it depends on both your Source and Target platforms. There's no universal fix for every data movement. Based on what we've seen, there are two ways to go about it:

1. Automated data migration or DIY migration

2. Custom data migration

3. Automated or custom data migration + Delta migration

Need help planning and executing your service desk migration? Reach out to us, and we'll assist you in building your migration project.

PRE-MIGRATION SETTINGS ON HALO ITSM ACCOUNT

For a smooth Halo PSA data migration, go through these steps:

1. To connect Halo PSA, you need to provide

   a. **Authorisation Server**: Click Configuration → Integrations → Halo PSA API → Authorisation Server.

   b. **Tenant**: Press Configuration → Integrations → Halo PSA API → Tenant.

   c. **Client ID**: Go to Configuration → Integrations → Halo PSA API → View Application → New.

   d. **Client Secret**: Navigate to Configuration → Integrations → Halo PSA API → View Application → New.

Add an Application

Details   Permissions   Security

Application Name *

Enter the name of the Application here

☑ Active

Authentication Method *

○ Username & Password

○ Implicit Flow (Single Page Application)

○ Authorisation Code (Native Application)

◉ Client ID and Secret (Services)

For backend non user-facing applications only. This method allows logging in just with a Client ID and Client Secret. A username and password is not needed.

Client ID

This is a unique identifier for your Application, and you will need this to Authenticate.

Client Secret

The Client Secret is used to access to the API without logging in. If stored, it should be encrypted and never shown.
The Client Secret for this application will only be shown once. If you forget it you'll need to generate a new one. Generating a new Client Secret will stop the old one from working.

Generate   Copy

Login Type *   **Agent to log in as** *

Agent   × ▼   Select...   ▼

Save   Cancel

Note: You can connect the on-prem version of Halo PSA just like a cloud-based one. Fill in Authorisation Server, Tenant, Client ID, and Client Secret

2. Add all source agent profiles you want to import to Halo PSA and make sure they have accepted the team invitation. Open up **Configuration** → **Teams & Agents** → **Agents** → **New** → **Details** → **Preferences** → **Save**.
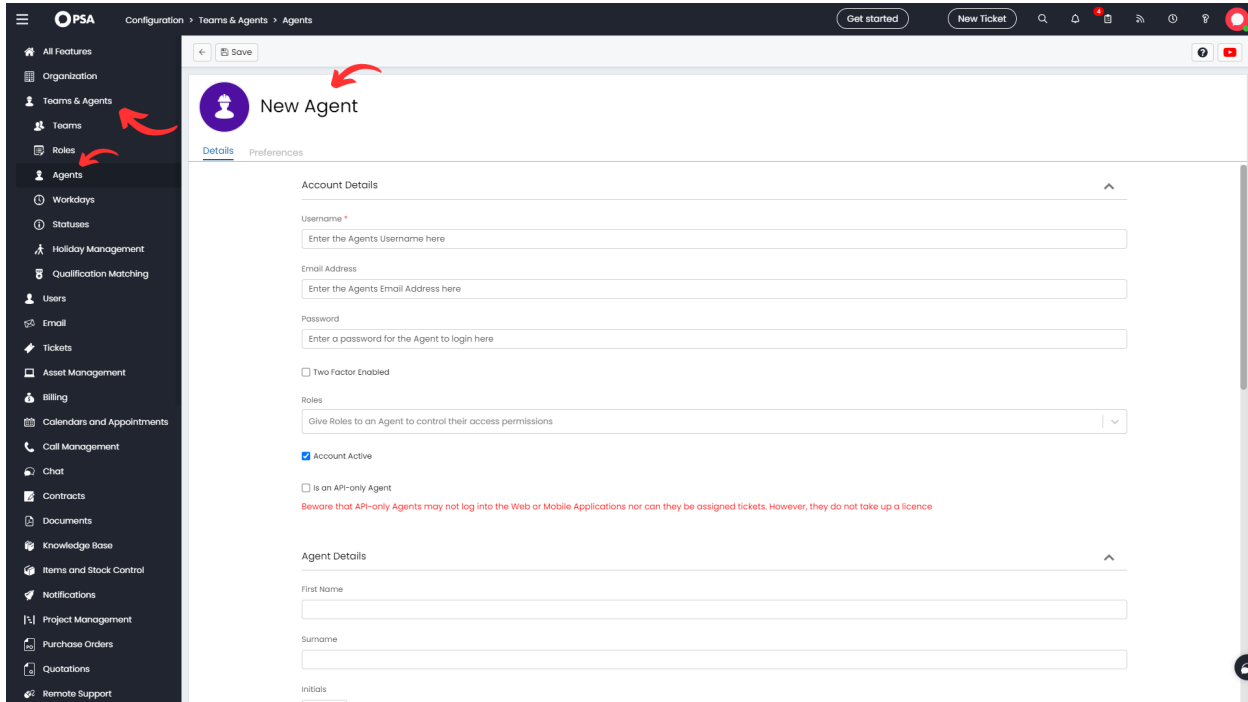
3. Create all source groups you need to shift to Halo PSA. Navigate to **Configuration** → **Teams & Agents** → **Teams** → **New** → type in **Details**, **Agents**, and **Other** → **Save**.
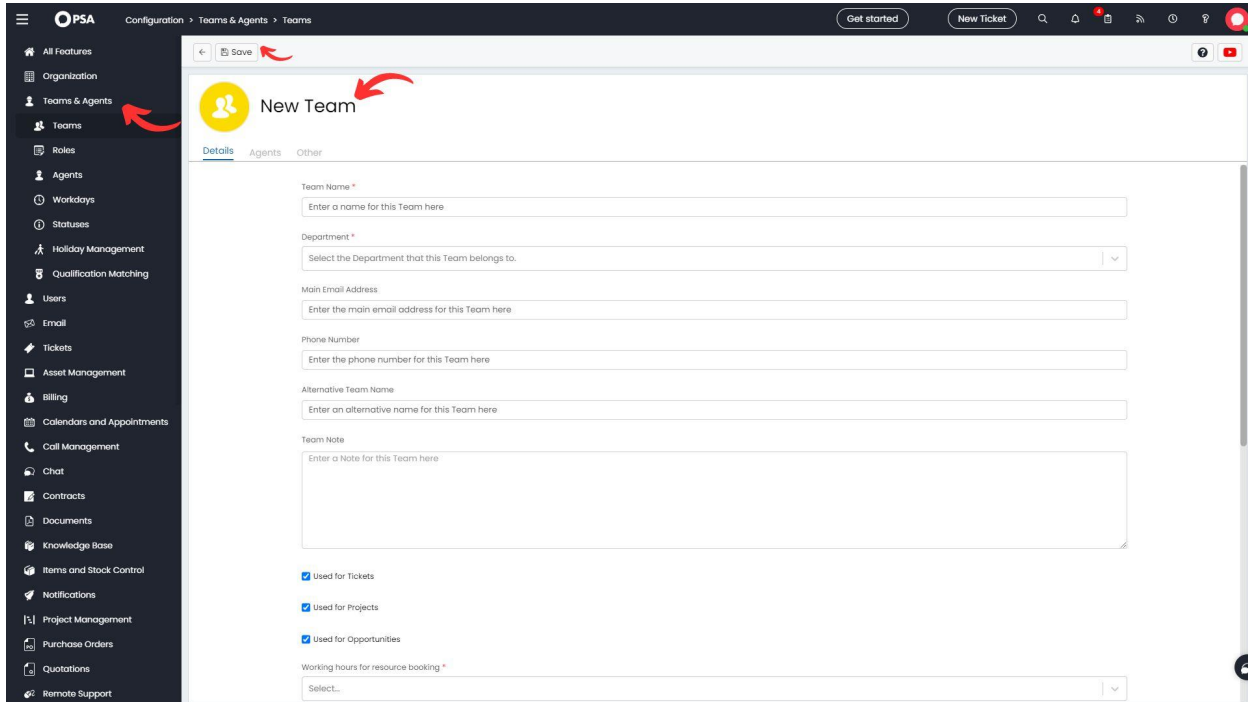
4. Set up all the source custom fields in Halo PSA. Navigate to **Configuration** → **Custom Objects** → **Custom Fields** → **New** → provide **Details** and **Visibility Restrictions** → **Save**.
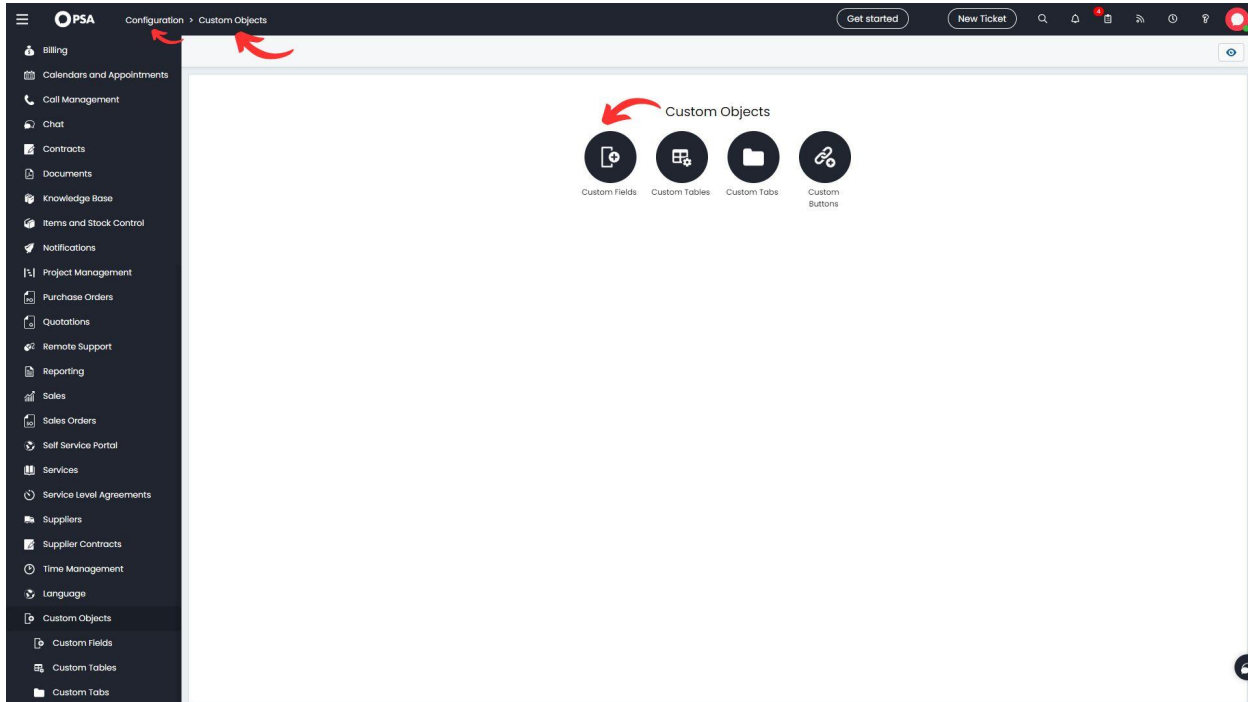
5. Switch off Approval Process so ticket statuses migrate correctly. Go to **Configuration** → **Tickets** → **Ticket Types** → click on a ticket type → **Edit**. Select **No** in the **Start an Approval Process** field. Then press **Save**.

6. Turn off notifications during data migration. Open **Configuration** → **Notifications** → **General Settings** → clear the checkboxes for every notification.

SETTING UP HALO PSA DATA MIGRATION

Try out our Demo Migration for a smooth data transfer. This way, you can test and adjust settings before the Full data transfer. Plus, you can re-run your trial Demo as many times as needed to get everything perfect.

Get started with your data migration to Halo PSA with these simple steps:

STEP 1. LOG INTO THE MIGRATION ACCOUNT

Create a Migration Wizard account with Google, Microsoft, or your work email. If you opt for the work email, confirm it by following the instructions sent to your email.

STEP 2. CONNECT YOUR SOURCE AND TARGET PLATFORMS

The Migration Wizard provides helpful tips along the way, ensuring a smooth connection process. However, be ready that access credentials for connecting your source platform and Halo PSA may vary.

To connect Halo PSA as your Target platform, fill in Authorisation Server, Tenant, Client ID, and Client Secret.

STEP 3. CHOOSE WHAT RECORDS WILL BE MOVED

Choose the data entities you want to transfer to Halo PSA, then match them; that might be groups, agents, tickets, and articles.

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contact@help-desk-migration.com

STEP 4. MATCH GROUPS

Select '**Match items**' to map groups between the Source and Target platforms. If there are unassigned, inactive, or deleted groups, you can choose a default one. Or create any missing groups, whether it's one or multiselect, in Migration Wizard!
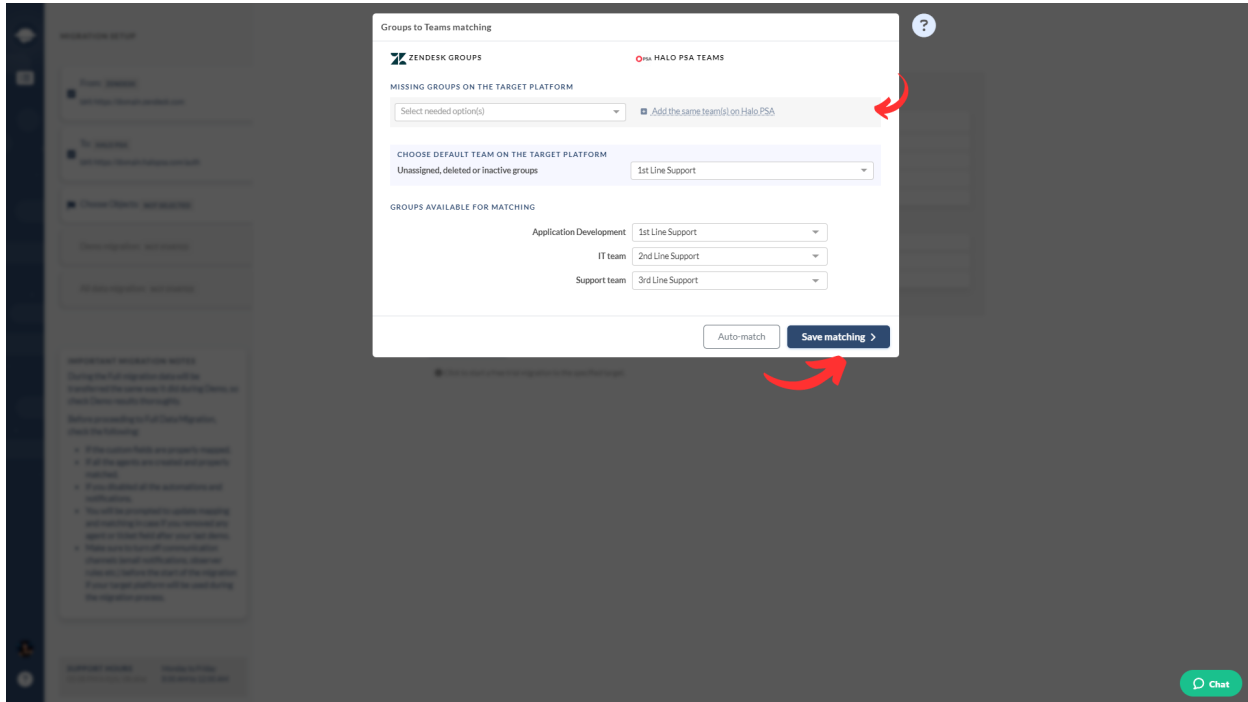
Click '**Save matching**' to continue. If you need to re-run a Free Demo, use 'Auto match' for groups.

STEP 5. MATCH USERS

Choose '**Match items**' for users to map agent profiles between the Source and Target platforms. If you have unassigned tickets, deleted or inactive agents, select a default agent for those records.

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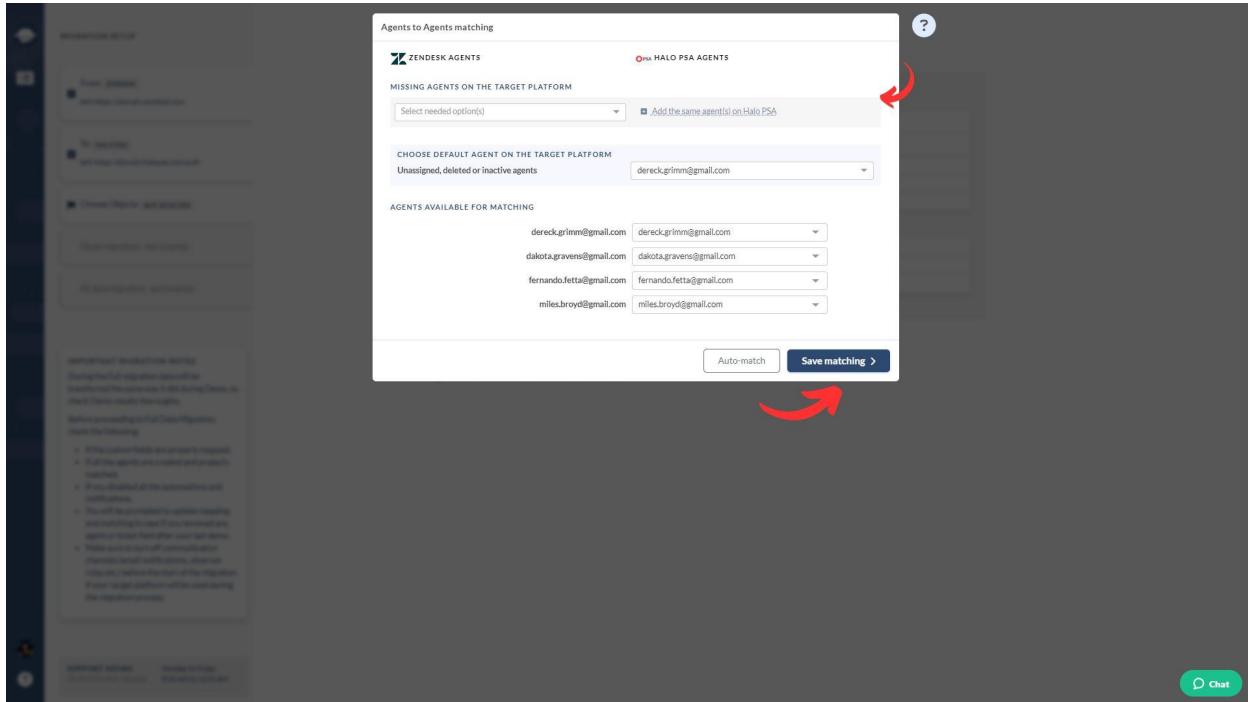
Click '**Save matching**' to move to the next step. Use '**Auto match**' for users if you re-run your trial Migration.

STEP 6. MAP TICKET FIELDS

When you select tickets, you'll see a window to map their fields. System fields like subject, group, and organization are mapped automatically. Check and set up default and custom ticket fields.
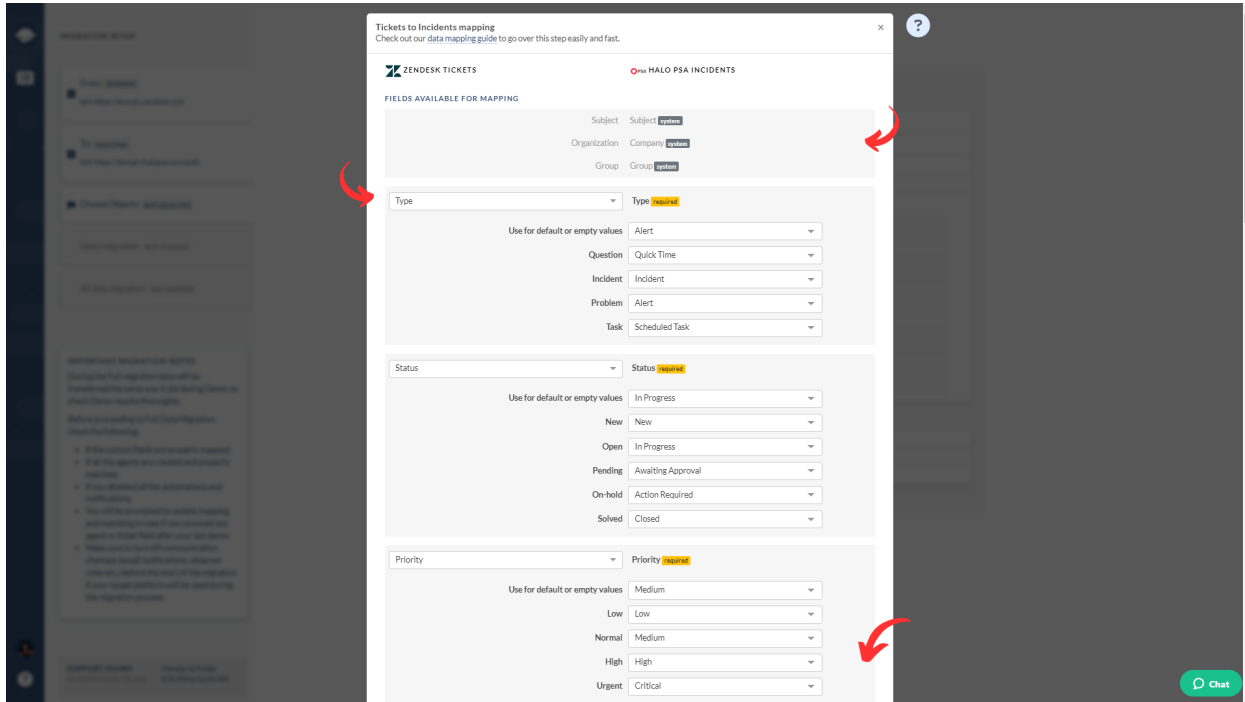
To map custom fields, set them up in Halo PSA first. When ready, click 'Save mapping'.

STEP 7. MAP ARTICLE VALUES

Choose 'Map items' to match article fields. This is where you align article statuses between your Source and Halo PSA accounts. When done, click 'Save mapping' to continue.
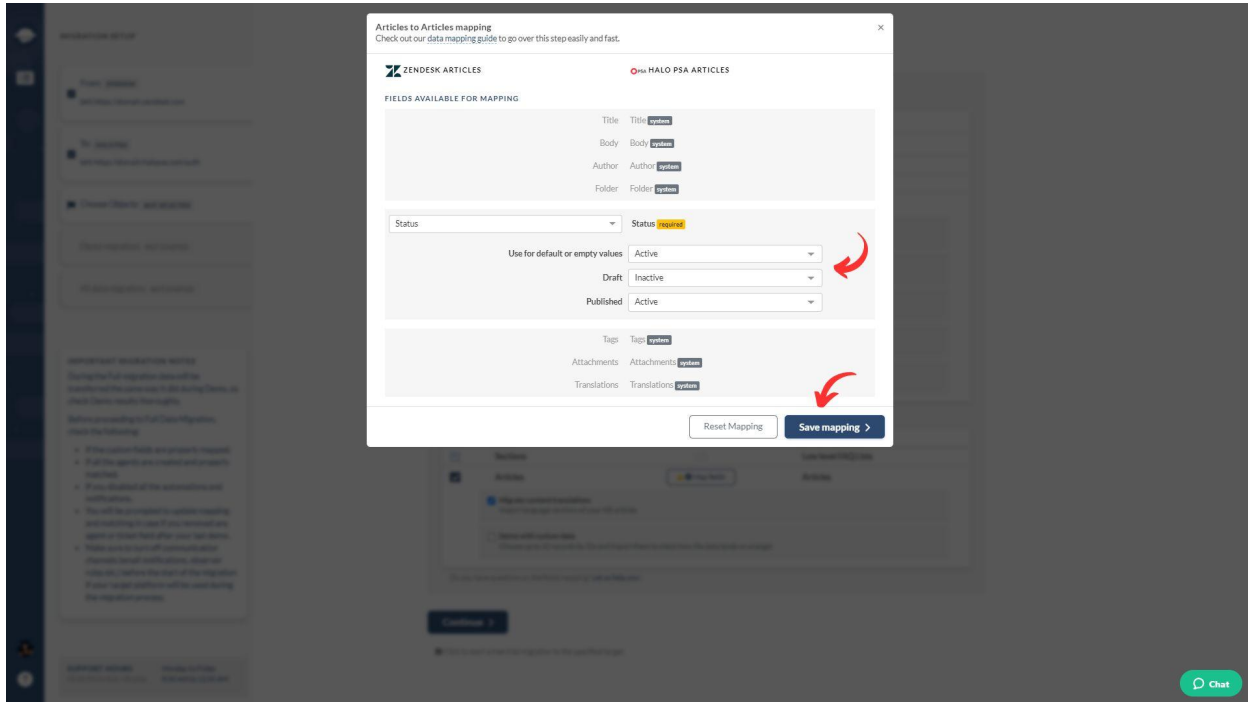
STEP 8. OUT-OF-THE-BOX CUSTOMIZATION OPTIONS

Your customization choices depend on your specific data movement—like from Zendesk to Halo PSA. Here's what you can customize:

- **Move inline images as ticket attachments** to keep customer data intact.

- **Skip attachments**. Though Migration Wizard typically moves all attachments, you can skip them for storage efficiency or faster data migration.

- **Transfer call recordings** as attachments for convenient future access.

- **Demo with custom data** to migrate 20 selected tickets and articles for a preview.

- **Move side conversations** into private notes to maintain customer context.

- **Migrate content translations** to maintain your Help Center multilingual.

Once you've finished mapping data, click '**Continue**.' If there's anything you missed, the Migration Wizard will prompt you to review it.

WHAT TO DO AFTER THE FREE DEMO MIGRATION

After completing your trial Migration to Halo PSA, follow these steps.

VERIFYING DEMO RESULTS

It's crucial to review the Demo migration results because the process mirrors the Full Data Migration. If some records didn't move in the trial, they won't transfer in the Full Data Migration.

Review reports for migrated, skipped, and failed records. Confirm each by checking IDs on the Source platform and Halo PSA.

WHAT TO LOOK FOR WHEN CHECKING MIGRATED RECORDS

- All comments moved, and the authors remain the same.

- Tickets assigned to agents correctly.

- Contacts and organizations migrated accurately.

- Articles moved with original statuses.

- Attachments transferred as expected.

- Demo data not affected by automation rules.

MANAGING SUSPENDED DEMOS

If your Free Demo gets suspended, let our support team help you. Make sure they have access to your Halo PSA data integration for a speedy fix.

If you see any failed reports, figure out what went wrong by checking record IDs. If you can, fix the issue, check '**I've fixed errors**,' and restart the Demo.

CHOOSE SUPPORT PACKAGE

Help Desk Migration is here to assist with your data migration, no matter the requirements. [Choose the plan](#) that suits you, whether it's basic support or extras like Delta, re-migration, or Interval migration.

Discover the additional benefits included in Premium and/or Signature plans:

Data re-migration	Re-migrate your data within 5/10 days following the Full Migration.
Interval Migration	Pause your migration during weekdays and resume on weekends or a schedule convenient for you.
Delta Migration	Update or add tickets and articles created after the Full Migration using Delta Migration. Be mindful of potential duplicates if you're still active on the source platform.
Skipped/Failed Records Check	Use the Skipped/Failed Records Check for a thorough custom migration.

PRICE BREAKDOWN AND PAYMENT

Check the detailed breakdown of prices to understand the Full Migration cost better.

When you're set, enter your billing information and click 'Submit order' to complete the payment.

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contact@help-desk-migration.com

GRANT ACCESS TO YOUR COLLEAGUES AND CUSTOMIZA THE MIGRATION NAME

If the mapping step feels a bit tricky, consider teaming up with a colleague. Just share access to your Halo PSA data transfer in a few clicks.
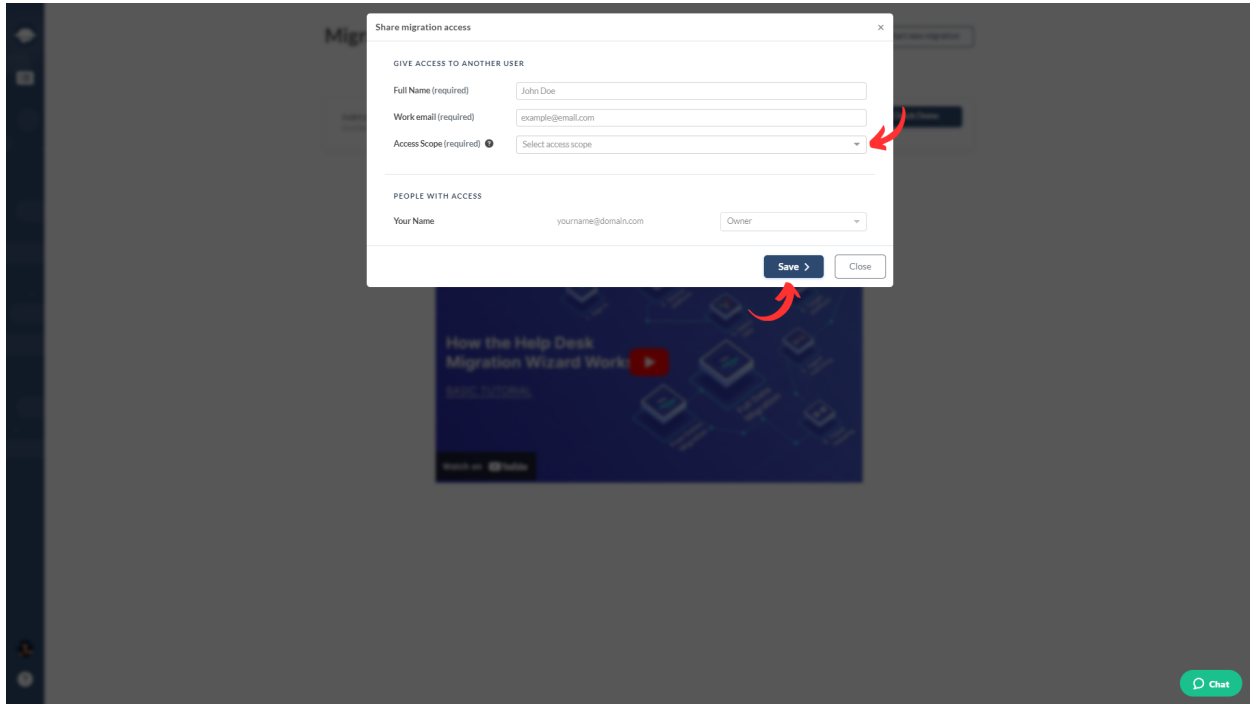

You can control the access level—determine if it's full or restricted access, and if required, you can withdraw it.

Stay organized—[label each data migration](#) for swift and straightforward identification.
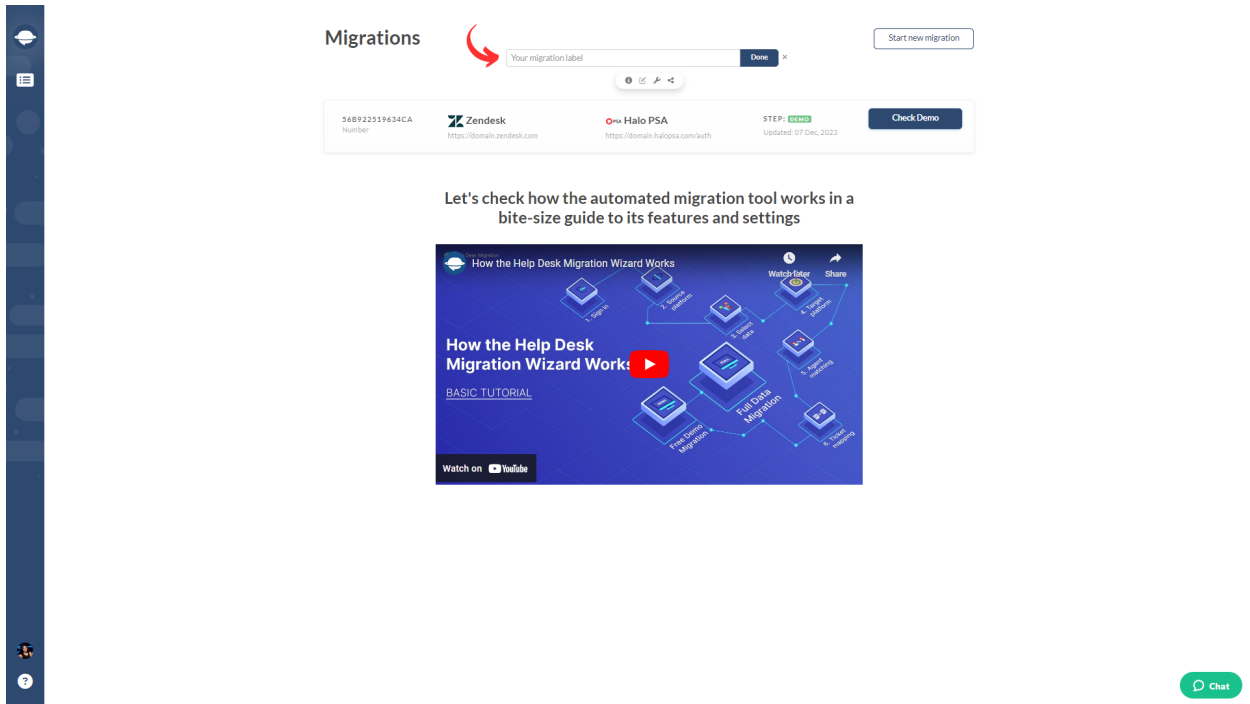
START FULL DATA MIGRATION

After your payment is confirmed, go back to the Migration Wizard. Remember, keep things smooth by avoiding last-minute changes.

If you're ready, start your Full Data Migration right away. Or, pick a time that works for you and click "**Save schedule**."
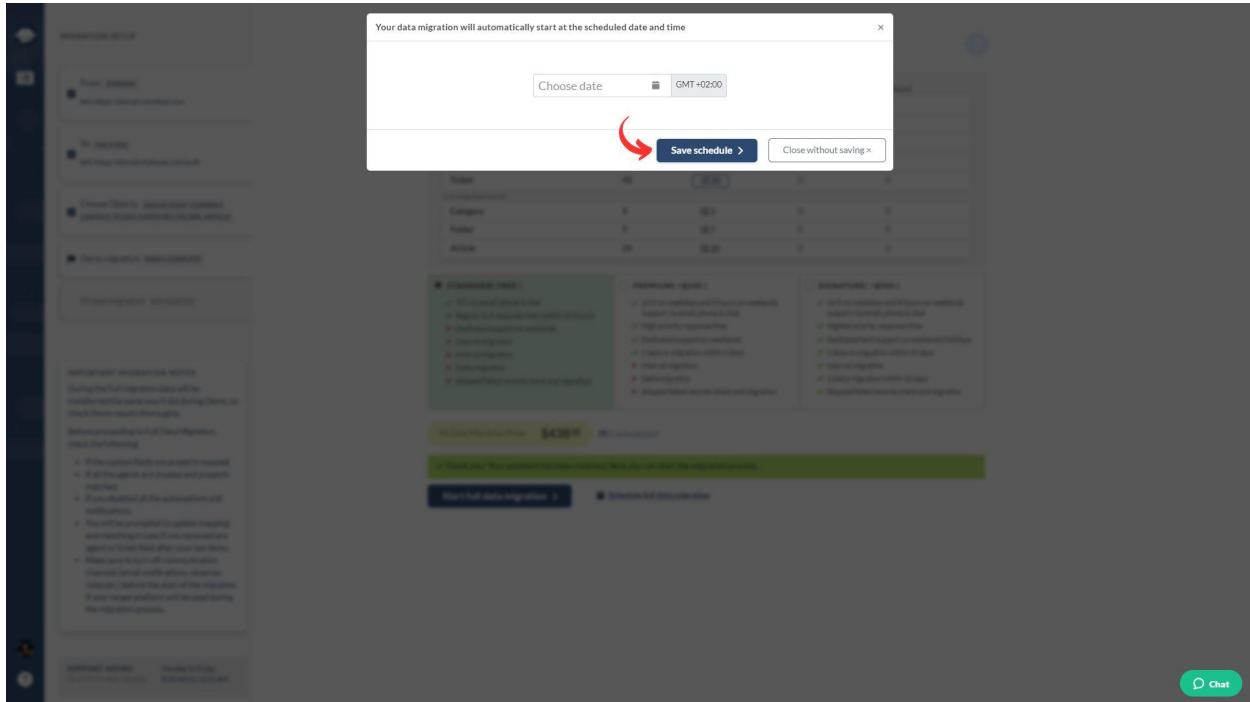
The time it takes to move your data depends on the number of records. Typically, it's about 2000 tickets per hour on average. If you want it faster, ask your vendors to boost your API limits. Just let us know before you kick off your Full Data Migration.

Got questions? Our support team has your back for a smooth Halo PSA data replication.

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