



Help Desk Migration

# HELP SCOUT DATA MIGRATION CHECKLIST



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Data migration is a complex process that often requires some effort. To simplify your **migration to Help Scout** and enhance the process tenfold, we've created a comprehensive data migration checklist.

**Note:** Migration Wizard cannot automatically import the following types of records into Help Scout:

- Inline images
- CC users (Emails of CC users will be migrated into a custom field instead)
- Contact and organization custom fields

If you still wish to migrate these records, [get in touch with our support team](#) for a personalized option.

Additionally, when importing your Knowledge Base into Help Scout, please be aware that the dates will be updated to reflect the date of the data migration, rather than the original dates

## BEFORE YOU SET UP THE MIGRATION

Follow these steps to optimize efficiency without compromising data integrity:

**Both the Demo Migration and Full Data Migration processes handle records in the same manner. If any data was not successfully transferred during the Demo Migration, it will not be included in the Full Migration.**

Following the Demo Migration, download reports for records that have been successfully migrated, those that failed, and those that were skipped. Then, thoroughly validate that all data has been transferred accurately. If any issues arise, please don't hesitate to reach out to our migration experts.

### 1. SET A CLEAR TIMELINE

The success of your data migration process hinges on the quantity and quality of your data. It's crucial to allocate ample time for thorough preparation. Choose a day with minimal help-desk-related tasks to ensure a smooth transition.

### 2. COMMUNICATE WITH YOUR TEAM

Inform your team members about the upcoming data migration to Help Scout. This allows them to acclimate to the new help desk system. Delegate specific responsibilities and send a reminder one day prior to the migration.

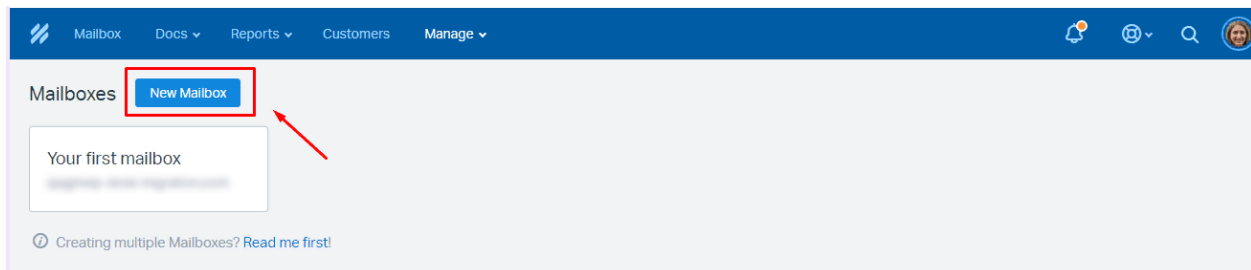
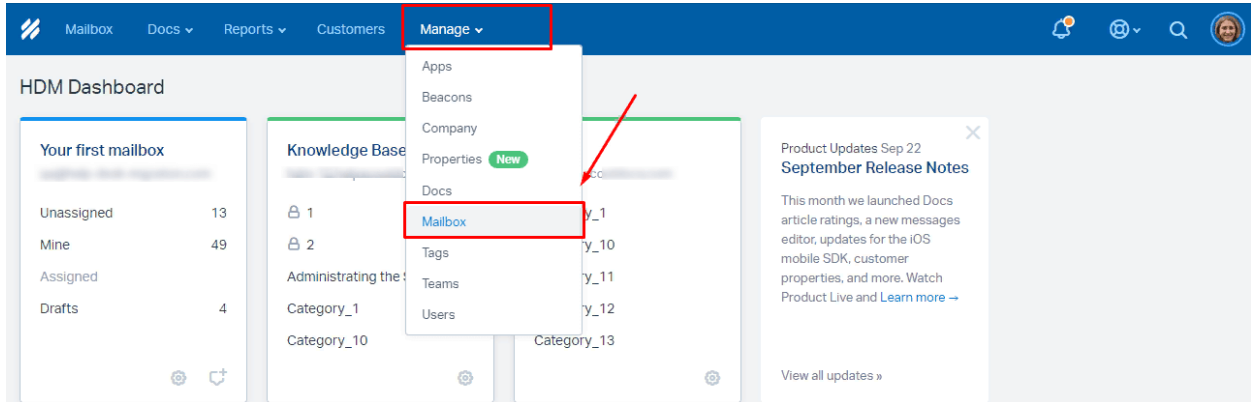


### 3. PREPARE YOUR NEW HELP DESK FOR THE MIGRATION

Follow this guide to prepare Help Scout for seamless data migration:

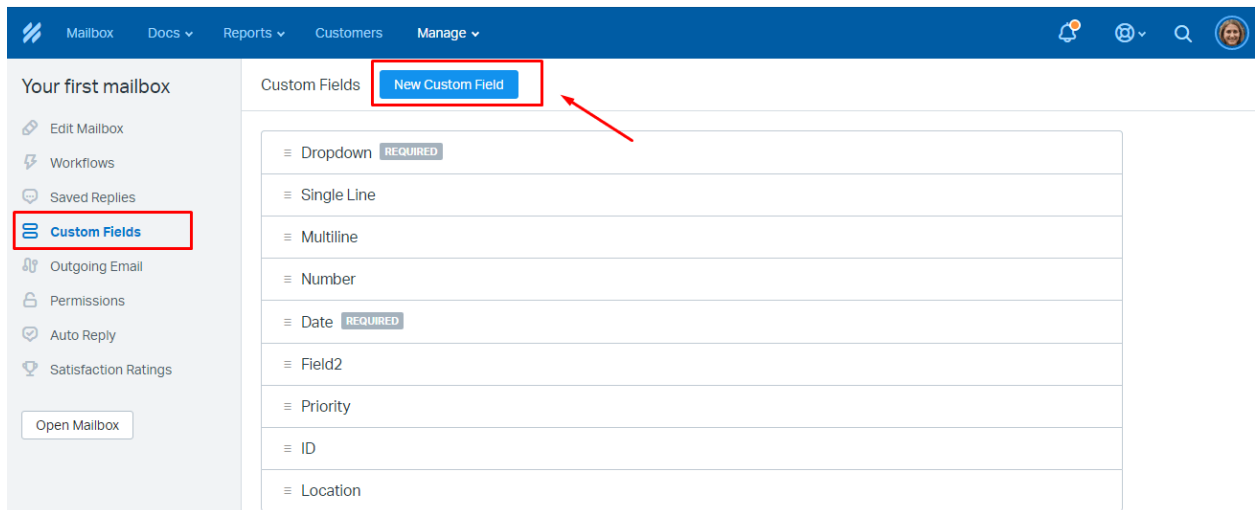
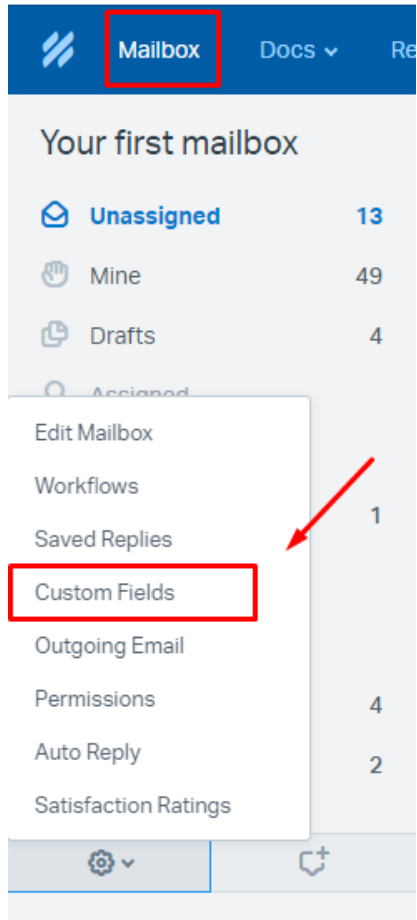
1. **Create mailboxes.** To work efficiently in Help Scout, you'll need to manually create mailboxes.

Go to **Manage** → and select **Mailbox** from the dropdown menu. Click **New Mailbox**.



2. **Create custom fields.** Custom fields are essential for preserving your data structure and enabling quick access after migration.

Click **Mailbox** then **Settings** . Choose **Custom fields** in the dropdown menu. Click **New Custom Field**.



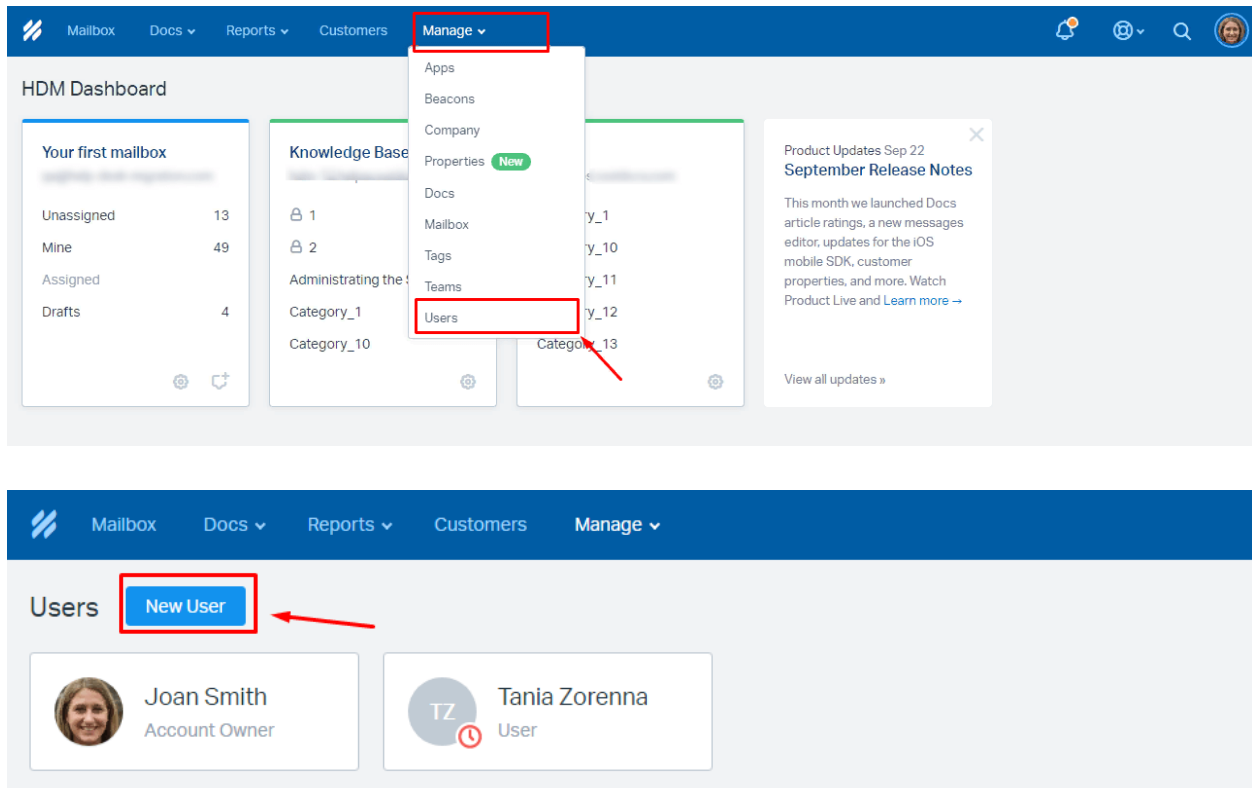
**Note:** Custom fields can be created for Tickets but not for Contacts.



3. **Add agents.** Create agents on Help Scout with the same emails as your current help desk before migration. Set up at least one agent profile to enable agent matching and the option 'Add the same agents on Help Scout.'

Navigate to **Manage** and select **Users**. Click **New User**.

**Note:** Ensure that you assign your agents to the appropriate mailboxes.



## 4. CONSIDER THE LIMITATIONS AND PECULIARITIES

Before proceeding with the Full Data Migration to Help Scout, please take note of the following:

- When transferring your data to Help Scout, select only one mailbox for migration. If you wish to import records into different mailboxes, you will need to configure a separate migration for each mailbox within your Help Scout account. If you're transferring data from Help Scout to another help desk, we can facilitate the migration of multiple mailboxes through a custom data migration. However, for a default migration, you'll need to initiate separate migrations for each mailbox.
- If you plan to [migrate Knowledge Base articles](#), make sure to enable or create Docs in advance.



- Be aware that tickets should not exceed 100 comments on the platform. If you have more than 100 comments, the Migration Wizard will create an additional ticket to accommodate the surplus comments.
- It's essential not to deactivate end-users as we cannot migrate their cases.
- Before initiating the migration, ensure that you have admin rights for both your source platform and Help Scout.

## 5. POPULAR CUSTOMIZATIONS

[Reach out](#) to our team if you have specific requirements for your Help Scout Migration, especially if the available automated options do not meet your needs.

- Migrate Contact custom fields into 'Contact Notes' to preserve the required data.
- Migrate inline images as attachments.
- Implement data filtering based on various criteria, such as creation date, tags, custom fields, organizations, and assignees.

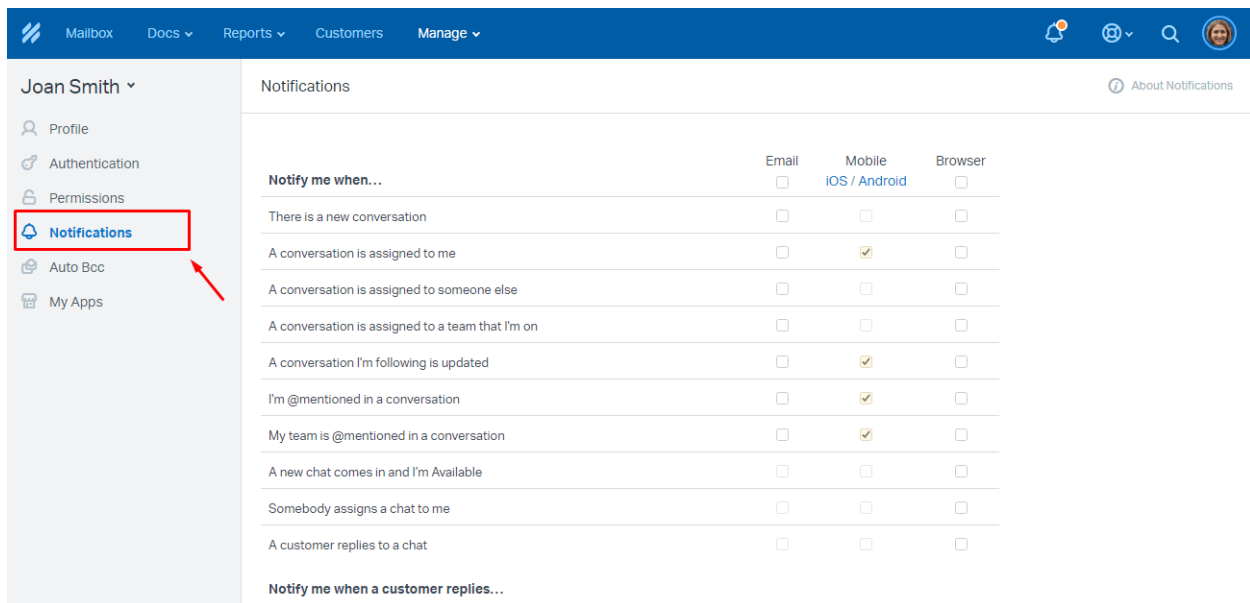
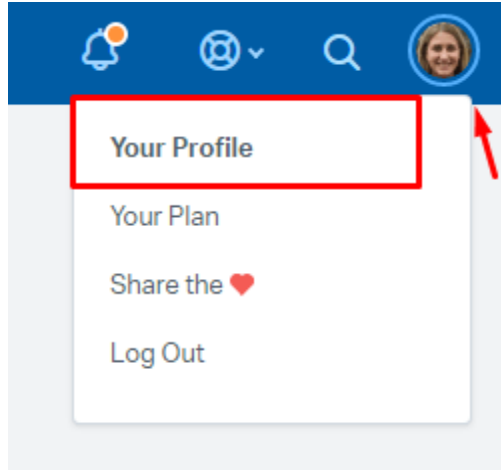
# YOU'RE ALMOST READY

## 1. TURN OFF NOTIFICATIONS

Ensure you turn off Notifications before migration to omit unwanted notifications.

Click on the **Profile** icon. Go to **Your Profile**, then navigate to **Notifications**. Turn off the needed notifications.





## 2. FIND ACCESS CREDENTIALS

When running a Demo Migration, you'll require access credentials for both the source platform and Help Scout.

To connect Help Scout with our tool, follow these steps:

1. For **Docs API**: My Profile -> Authentication -> API Keys.
2. For **OAuth authentication**: Sign in with your Help Scout account.

**Note:** You'll only need Docs API if you intend to migrate the Help Center to Help Scout.





## 3. START DEMO MIGRATION

Set up a Demo Migration to preview the outcome of a Full Data Migration. The Migration Wizard transfers 20 random tickets and 20 articles from your current platform to Help Scout. You can edit your migration settings and rerun the demo.

Go through the steps below:

1. Sign in to your account.
2. Connect your source and target solutions.
3. Choose the data you want to import.
4. Match [agents and groups](#).
5. Map tickets and articles route.
6. Pick up [automated options](#).
7. Start your Free Demo Migration.

## AFTER THE DEMO MIGRATION

### 1. CHECK THE RESULTS OF THE DEMO

Review the results in a table with four columns:

- all available records
- migrated records
- failed records
- skipped records

Download reports for migrated, failed, and skipped records to verify the results. When checking the migrated records, ensure that:

- Comments are successfully migrated, and authors are correctly preserved
- All tickets are assigned to the appropriate agents



- Custom fields are transferred
- Customers and companies are migrated accurately
- Attachments and labels are preserved

**Note:** Make sure to examine each ticket, particularly its location and quality features. Also, validate the integrity of attachments by downloading them from the destination platform.

For a more comprehensive guide on checking Help Scout migration results, refer to [a detailed guide](#).

## 2. RUN A DEMO WITH CUSTOM DATA

You can test our Migration Wizard with a Custom Demo Migration as well. Select 20 tickets by ID, such as those with more replies, attachments, or notes, and initiate your Demo with custom data.

**MIGRATION SETUP**

From: CAYZU

To: HELP SCOUT

Mailboxes: [selected]

Sites: [selected]

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 Help Scout and are properly mapped.
- If all the Rules, Actions and Notifications are disabled.
- If all the Users are created in Help Scout and have access to the correct mailbox.
- If all Integrations are turned off.
- You will be prompted to update mapping and matching in case if you removed any agent or ticket field after your last demo.

**MAPPING**

### Select Objects

HELP DESK OBJECTS

CAYZU	HELP SCOUT
<input checked="" type="checkbox"/> Groups	Match items Teams
<input checked="" type="checkbox"/> Agents	Match items Users
<input checked="" type="checkbox"/> Customers	>>> Companies
<input checked="" type="checkbox"/> Contacts	>>> Customers
<input checked="" type="checkbox"/> Tickets	Map fields Conversations

**Add a new tag to tickets**  
Mark the migrated tickets with tag(s) and sort them out easily on your destination platform  
Imported Add tag and press comma

**Migrate inline images as ticket attachments**  
Keep embedded images even when your source is unavailable. It may increase the migration time

**Skip attachments**  
Keep ticket attachments, or leave them behind to save storage space or migrate faster

**Demo with custom data**  
Choose up to 20 records by IDs and import them to check how the data lands on a target  
Add record id and press comma

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

**Continue >**

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



# DURING THE MIGRATION PROCESS

## 1. SELECT MIGRATION OPTIONS

Choose between your source or target help desk during the Full Data Migration. Note that records created or updated during the process won't be migrated when using a source help desk. In such cases, consider a [Delta Migration](#) to import them later.

**Note:** you can set up a Delta Migration if you have [purchased a Signature plan](#).

As the Full Data Migration goes in the cloud, you can monitor the progress on a data migration page.

## 2. START FULL DATA MIGRATION

You can start your Full Data Migration when two conditions are met:

- **The payment has been confirmed.** Payment has been confirmed, so ensure to make the payment in advance.
- **Check migration notes.** You have read through the migration notes in the sidebar on the left.

The screenshot displays the migration configuration page. On the left sidebar, there are sections for 'Sites', 'Choose Objects' (GROUP, STAFF, COMPANY, CONTACT, TICKET), 'Demo migration: DEMO COMPLETE', and 'All data migration: NOT STARTED'. A red box highlights the 'IMPORTANT MIGRATION NOTES' section, which contains instructions for a successful migration, such as checking custom fields, rules, actions, and user access.

Company	EUR	USD	GBP	JPY
Contact	256	20	0	0
Ticket	394	20	0	0

- STANDARD ( FREE )**
  - ✓ 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
- 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
  - ✗ Interval migration
  - ✗ Delta migration
  - ✗ Skipped/failed records check and 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

All Data Migration Price **\$547<sup>00</sup>** [Price breakdown](#)

✓ Thank you! Your payment has been received. Now you can start the migration process.

[Start full data migration >](#) [Schedule full data migration](#)

**SUPPORT HOURS** Monday to Friday  
11:10 AM in Kyiv, Ukraine 8:00 AM to 12:00 AM

### 3. FULL MIGRATION RULE

Do not modify settings or delete data. During Full Migration, avoid altering settings or deleting data on the destination platform to prevent migration issues or skipping records.

If you encounter any problems on your current help desk, wait for the data import to finish. Only then should you attempt to resolve issues on your own or contact our support team.

## AFTER THE IMPORT IS DONE

### 1. CHECK EVERYTHING CAREFULLY

Inspect the results of the Full Data Migration within five days or ten days (depending on your Support plan), as your data migration will be archived after that. Enlist the help of your agents to expedite the process. If you encounter any discrepancies or missing records, [get in touch with our team](#).

### 2. UPDATE YOUR PLATFORM

Re-enable notifications and other settings you had turned off, and update internal links for Knowledge Base articles. Also, re-route your emails to Help Scout.



# 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

