



Help Desk Migration

HUBSPOT SERVICE HUB DATA MIGRATION CHECKLIST



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The success of your data migration heavily depends on a reliable third-party service. But what can help you even better is a detailed checklist, exclusive to HubSpot Service Hub.

Before we proceed further, check out what data our tool can't migrate to HubSpot Service Hub:

1. Groups
2. Inline Images
3. Audit fields (however, it can be migrated during customized migration free of charge)
4. Knowledge Base Data – here you can use the [pre-build HubSpot Importer](#).
5. Tags can be imported in a custom text field
6. CC in Tickets

If you want to import those records, [request a Custom Data Migration](#).

BEFORE YOU SET UP THE MIGRATION

When it comes to data migration, thorough preparation is the key to success. Go through the checklist to prepare for data migration.

1. PICK YOUR CUT-OFF DATE

Start data migration when your team has a minor workload.

2. INFORM YOUR SUPPORT TEAM

Tell your agents about the switch to HubSpot Service Hub. Delegate some responsibilities if needed. And send a reminder about data migration to all your employees before the process itself.

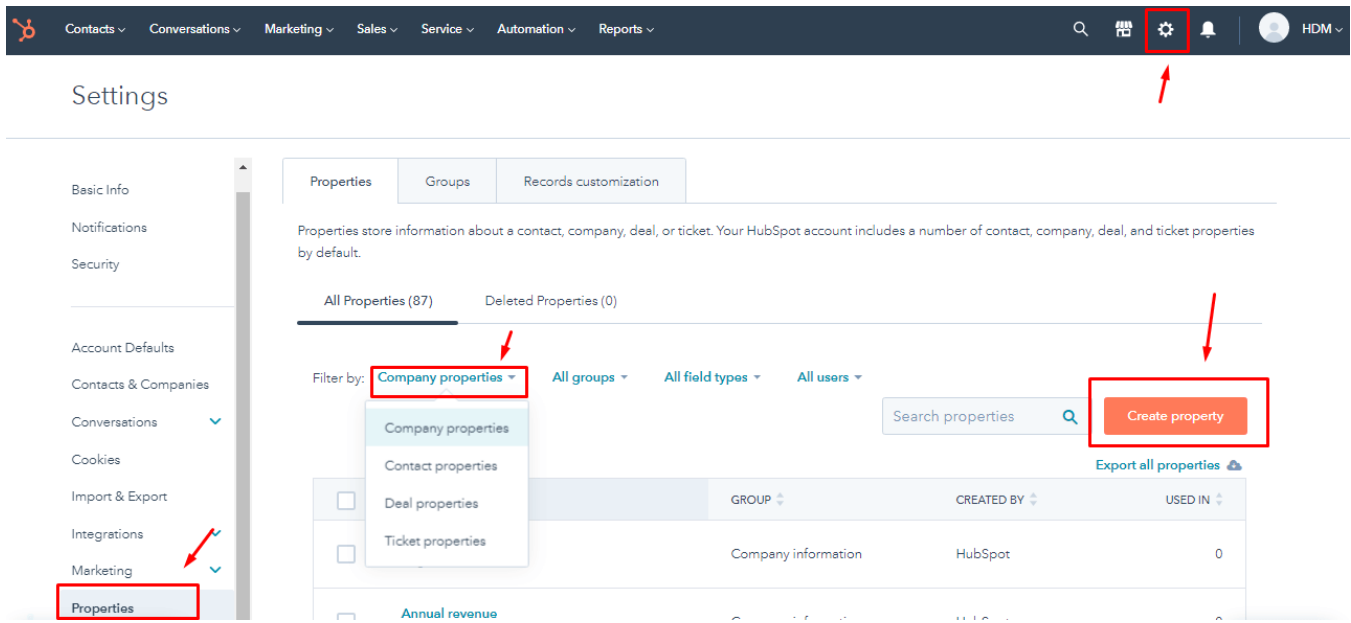
3. PREPARE HUBSPOT FOR MIGRATION

Before the migration starts, prepare HubSpot to receive the data successfully. Pay attention to the following:

1) **Create corresponding custom fields.** Be sure to recreate the identical types of custom fields to the ones you currently have:



Go to **Settings > Properties > Select properties type > Create property.**



Note: HubSpot offers several property types, and you need to pay close attention to pick the correct module.

2) **Add agents.** This way, our migration tool can assign the tickets to appropriate users. Note that HubSpot Service Hub allows you to specify the level of access you will give to your users.

To add an agent, go to **Settings > Users and Teams > Create user.**



Settings

Your Preferences

Basic Info

Notifications

Security

Account Defaults

Contacts & Companies

Conversations

Cookies

Import & Export

Integrations

Marketing

Properties

Sales

Tickets

Tracking Code

Users & Teams

Try the settings beta

Chat

Your team has created 1 out of 1 teams. Upgrade to unlock more teams. Upgrade

Users Teams

Create new users, customize user permissions, and remove users from your account.

Status: All

Search

Create user

NAME	TEAM	ACCESS
Agent QA+1		Service Contacts Account Reports Marketing
HDM QA	general	Super Admin
Vitalii Agent		Service Contacts Account Reports Marketing

25 per page

Important: Agent profiles should contain the same email as in the source platform.

3) **Customize your HubSpot Home page.** Choose what fields (both default and custom) you will see on your records and rearrange their order to make them look like what you've used to have on your old help desk.

To do so, go to **Settings > Properties > Records customization > Actions > Edit.**

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Tickets

Properties Groups Records customization

Choose the properties that will be displayed for users in your CRM when they view contacts, companies, deals, and tickets.

All records All teams

Search by name

Create team view

NAME	OBJECT TYPE	LAYOUT	VISIBLE TEAMS
Ticket record left sidebar	Tickets	Views	All teams
Contact record left sidebar	contacts	Views	All teams
Company record left sidebar	companies	Views	All teams
Deal record left sidebar	Deals	Views	All teams

4. LEARN ABOUT DIFFERENCES

Before the Full Data Migration to HubSpot, you should know that:

- You cannot migrate CC users. But, you can import emails of CC users into a custom field instead. The same works for Audit fields and Tags.
- HubSpot Service Hub stores ticket data in the Service module. You can find it under the sub-menu 'Tickets'. All ticket-connected history is also stored there, making it accessible for different teams.
- The ticket 'Created at' date will obtain the migration date, however, the dates of conversations and notes will migrate in a correct way (with the same dates as on the old help desk). As a result, you can't sort tickets by date in HubSpot Service Hub.
- Attachments will migrate as 'Hidden'.
- Create a custom field with the type 'Date' to migrate the dates of creation. Also, you can migrate tags into a custom text field.

Check if you have admin rights to your accounts in the source platform and HubSpot Service Hub.

Expert tip: If you need to tailor your data migration, consider some of the most popular options:

- Migrate inline images as attachments
- Account custom fields (the price depends on the number of fields)
- Contact custom fields (the price depends on the number of fields)
- Data filtering by different criteria (creation date, tags, custom fields, groups, organizations, assignees)

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

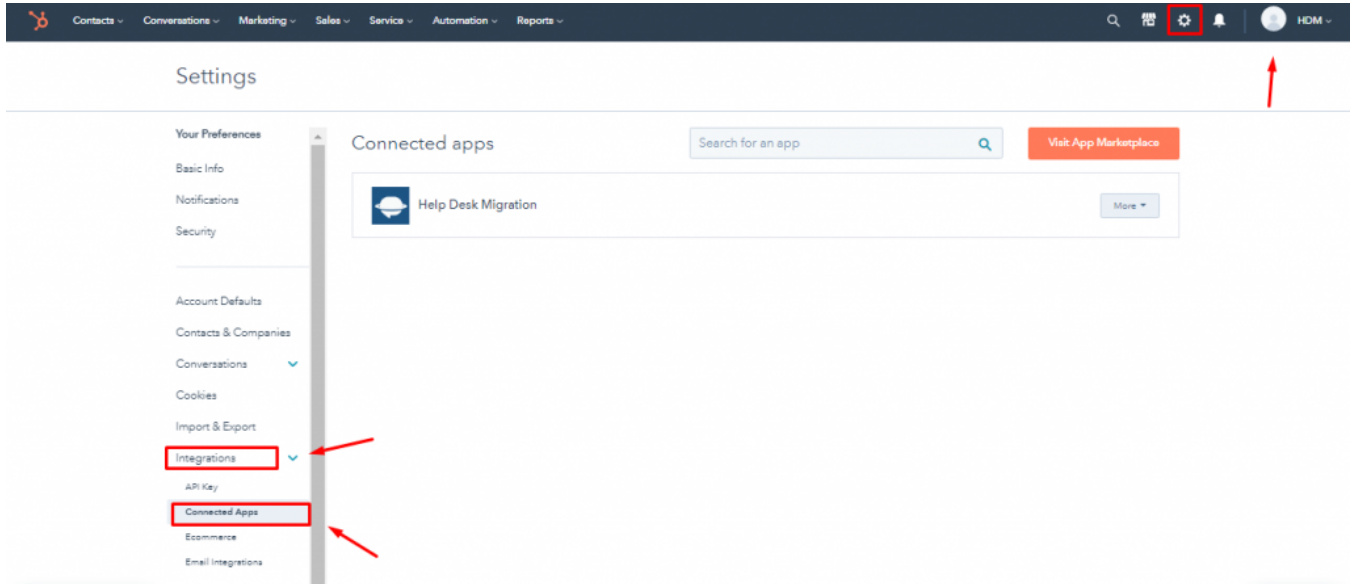
YOU'RE ALMOST READY

1. TURN OFF INTEGRATIONS

Avoid a messy data migration by turning the integrations off before and during the transfer. To disable them in HubSpot, do the following:

Go to **Settings** → **Integrations** → **Connected apps**.

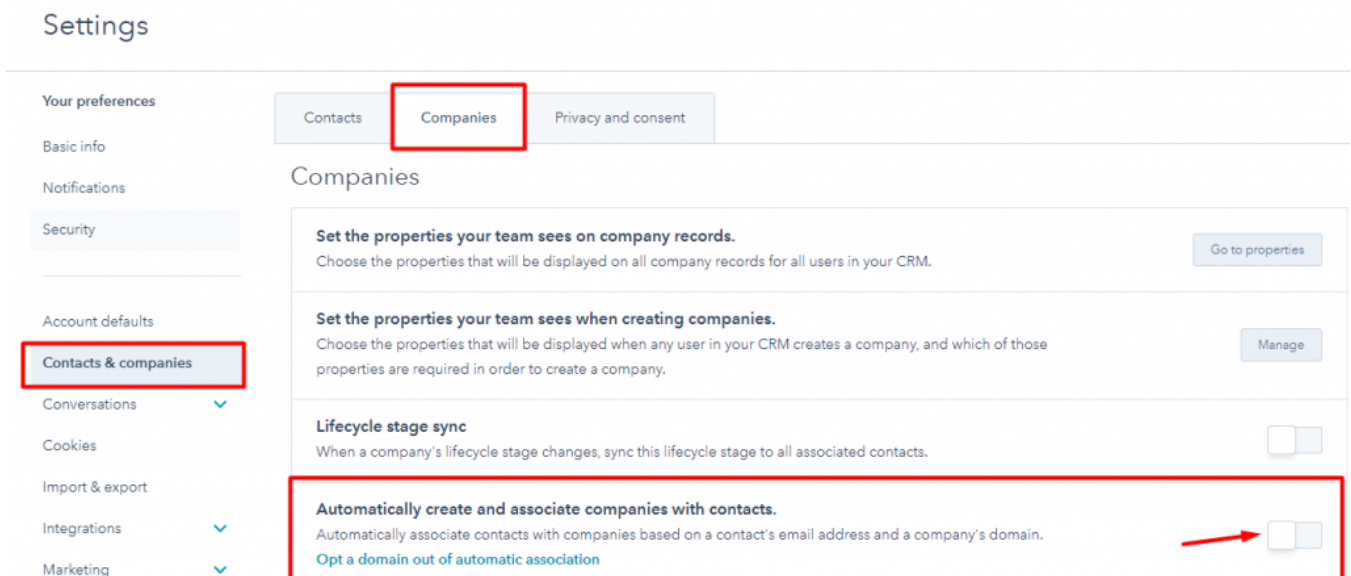




2. TURN OFF THE AUTOMATIC ASSOCIATION OF CONTACTS AND COMPANIES

Disable [Automatic association of contacts and companies](#) before data migration. This way, you avoid duplicates.

Go to **Settings > Contacts & Companies > Companies > Companies > Automatically create and associate companies with contacts** and switch off the toggle.



3. TURN OFF TICKET STATUS AUTOMATIONS

HubSpot Service Hub includes several automations that can update the statuses of all tickets to “**Waiting on contact**” if it’s turned on. If you want to keep the original ticket status when migrating from your source platform to HubSpot, disable automations before the data migration.

To disable triggers “**An email is sent to a customer**” and “**A customer replies to an email**”, [read on a detailed guide](#).

4. FIND ACCESS CREDENTIALS

When launching a Free Demo, you need access credentials to the source platform and HubSpot Service Hub.

You need to undergo OAuth authentication to connect HubSpot Service Hub with our tool.

5. RUN A DEMO

Instead of jumping right into Full Data Migration, we offer a demo transfer, which is probably one of the essential steps. In short, our tool transfers 20 random tickets from your old help desk to HubSpot Service Hub during the trial. Repeat the process as many times as you need.

1. Sign in to your Migration Wizard or create an account.
2. Connect your source and target solutions.
3. Choose the data you want to import.
4. Match [agents](#).
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 IN HUBSPOT SERVICE HUB

Once your Free Demo Migration is complete, check out a table with four different columns or records:



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

Download reports on migrated, failed, and skipped records to check the results. As you look through migrated data, pay special attention to:

- All Tickets along with their Type, Status, Priority, Source, and Custom fields
- Agent assignment
- Audit fields and Tags (if you had a customized demo)
- Whether any automations took action and email notifications got sent

Note: if something hasn't migrated during Demo Migration, it won't transfer during the Full Data Migration.

If you need more detailed information, [read a guide](#), explicit HubSpot Service Hub.

2. REQUEST A CUSTOM DEMO

If you have some tickets with more replies, attachments, or notes than your usual ones and want to see how they migrate over to HubSpot Service Hub, request a custom demo - we'll transfer the specific ticket IDs that you want. [Contact our team](#) beforehand to discuss all the details.

DURING THE MIGRATION PROCESS

1. CHOOSE MIGRATION FLOW TYPE

If you need to use one of your help desks, consider your options:

- Use a source help desk during the Full Data Migration. However, our tool doesn't migrate any data updated or created during the transfer. To import these records, run a [Delta Migration](#).



- Work with a target help desk.

As the **Full Data Migration** runs on the cloud, check it from time to time or wait for our team to contact you.

Note: Delta Migration is available in a [Signature support plan](#).

2. DON'T MAKE ANY LAST-MINUTE CHANGES

Any changes can cause your **Full Data Migration** to fail. If you see duplicated or unnecessary records on the source solution, don't do anything. *Audit data on HubSpot Service Hub* after the data migration.

3. START FULL DATA MIGRATION

Your **Full Data Migration** starts only begins when:

- **The payment has been confirmed.** Pay in advance, especially if you have a definitive time you want to start at. 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.

AFTER THE FULL DATA MIGRATION

1. TAKE A DETAILED LOOK

Right after the Full Data Migration, inspect if everything migrated correctly. You have five days to check the results until your data migration gets archived.

If you can't locate something:

1. Check if search filters are set for all tickets and any time period.
2. If the problem still remains, [drop a line](#) to our support team.

2. SET UP

Now, you can use HubSpot Service Hub to create and solve tickets, manage a business, and more. However, first, enable all the notifications, and set the necessary settings that you disabled during the previous steps.



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

