



Help Desk Migration

INTERCOM DATA MIGRATION CHECKLIST



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Data migration involves some legwork, but you can enhance it with the proper preparation. For that reason, our team has put a step-by-step migration checklist exclusive to Intercom.

Note that Migration Wizard can't transfer such records to Intercom:

- Groups
- Inline images
- 'Created at' date for tickets and comments
- KB attachments
- Comment Authors
- CC in Tickets

If you consider moving any of the listed records, [reach out to our migration experts](#).

Note: When importing your Knowledge base to Intercom, its dates will change from the original ones to the dates of data migration itself.

BEFORE YOU SET UP THE MIGRATION

Go through the following steps to prepare for the migration.

1. SELECT A DATE FOR MIGRATION

Data migration heavily depends on preparation. This way, give yourself enough time to prepare for the actual transfer. Your team needs enough time to prepare whether they should get used to Intercom or close as many tickets as possible.

2. KEEP YOUR TEAM ON THE SAME PAGE

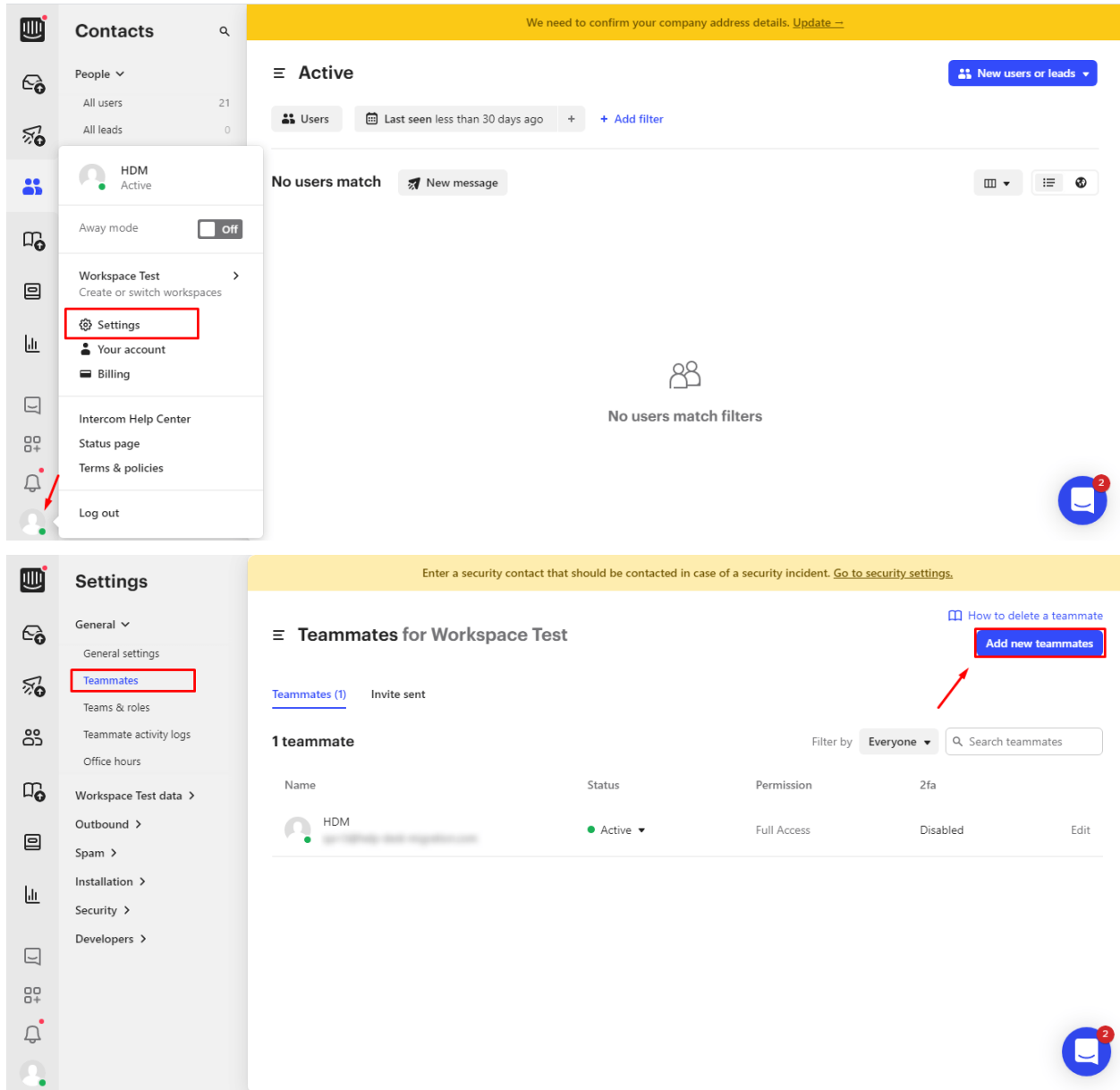
Notify your agents about data import to Intercom. Share certain responsibilities. Delegate your agents inspecting the transfer results after the **Full Data Migration**.

Note: if you want to speed up the **Full Data Migration**, send a request to the Intercom team, so they temporarily increase your API limits before migration.



3. PREPARE INTERCOM FOR THE TRANSFER

You need to add teammates prior to data migration. Click on the **Profile icon > Settings >** under **General**, select **Teammates > Add new teammates**.



4. CONSIDER THE PECULIARITIES AND LIMITATIONS OF INTERCOM

Intercom has the following peculiarities:

- If the Organization has no connected contacts, it won't be visible on Intercom
- If the comment has more than five attachments, another comment gets created with the rest of the attachments
- All the tickets will get the data migration date as the date of their creation
- If the ticket is requested by the agent, a new contact with the same email gets created. Then, all comments on that ticket will be displayed via the agent's profile. The contact with the same email will just become the ticket requester

5. CONSIDER POPULAR CUSTOMIZATIONS

While mapping data, you can choose automated options to improve Intercom import:

- add a new tag to the migrated tickets
- migrate content translations (**from Zendesk or Freshdesk*)

[Drop a line to our team](#) if you have any specific requirements for Intercom migration or if the available automated options aren't enough. For example, you can request customization like:

- Data filtering by different criteria (creation date, tags, custom fields, groups, organizations, assignees)
- Change of the default migration process (migration of change and problem objects as tickets, migration of ticket events as private notes, ticket custom fields into private note, migration of the information related to inactive users, import contact custom fields)
- Adding information to the migrated data (marking tickets with extra tags, adding legacy ticket ID to the ticket subject)

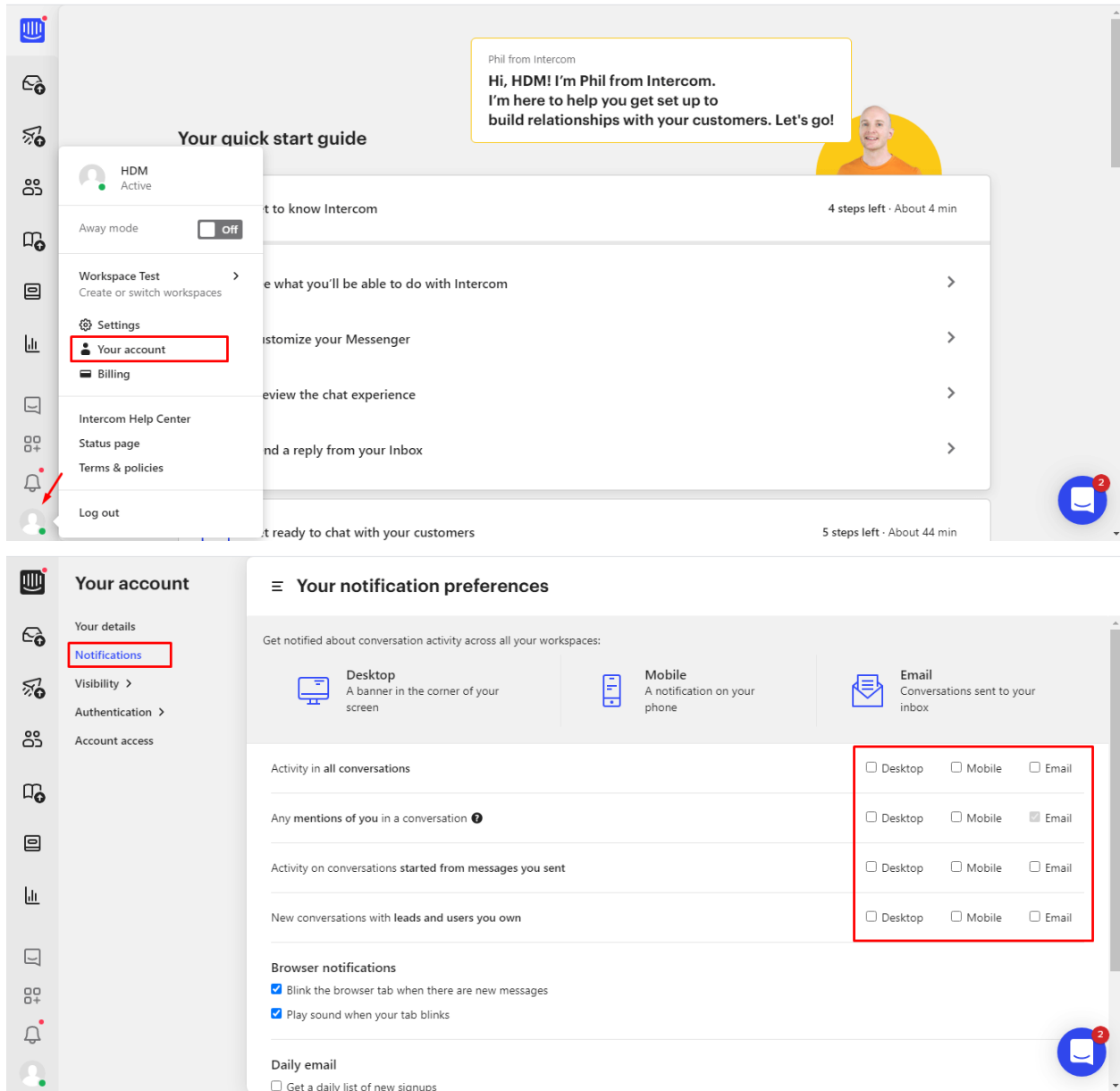
YOU'RE ALMOST READY

1. TURN OFF NOTIFICATIONS

Turn off Email Notifications and other triggers that might harm the migration process.

To disable notifications in Intercom, click on the **Profile** icon > **Your account** > **Notifications** > uncheck all the necessary **Notifications** > click **Save**.





2. FIND ACCESS CREDENTIALS

When initiating a Demo Migration, you require access credentials to the source platform and Intercom.

To connect Intercom with Migration Wizard, you need to undergo OAuth authentication. Once you connect Intercom you can choose the workspace from which or to which you are going to migrate data.



3. RUN A DEMO MIGRATION

In the Free Demo transfers 20 random tickets from your current help desk to Intercom. You can edit your settings and re-strat your Demo. But note the same.

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

AFTER THE DEMO MIGRATION

Review a table with four columns as soon as your Free Demo is complete:

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

Check the results by downloading migrated, failed, and skipped records reports. While reviewing the migrated records, pay attention to:

- all comments got migrated, and if the authors of the comments are the same
- the tickets are assigned to the correct Teammates
- all the custom fields got migrated
- the customers and companies are migrated correctly
- the attachments are migrated



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

BEFORE THE FULL DATA MIGRATION

1. SELECT YOUR MIGRATION FLOW

You can work with either your source or target help desk systems during the **Full Data Migration**.

If you continue working with your source help desk, pay attention to that records created or updated during the process won't get migrated. To fix that aspect, go for the [Delta Migration](#) to import them later. The Delta option is available in the [Signature support plan](#).

While the **Full Data Migration** is running, check out the progress in our tool anytime you want. Or wait for our team to contact you.

2. START FULL DATA MIGRATION

Intercom data migration might take from 20 minutes to a few days depending on the number of entities on your source system.

The **Full Data Migration** begins when **your payment is confirmed**. It might take some time to process payment; that's why make a transaction in advance or schedule data migration.

And **you've agreed to the checklist**. Be sure to go through all steps and put a tick in a checkbox.

AFTER THE IMPORT IS DONE

1. EXAMINE EVERYTHING

After the **Full Data Migration**, inspect if your customer records migrated correctly. You have five days to check the results until our tool archives your data migration.

If you can't find something, ensure that search filters are set for all tickets and any time. If the problem remains, [drop a line](#) to our migration experts.

2. SET UP A NEW PLATFORM

- Enable all the notifications that you had to turn off



- Switch on all communication channels
- Update the Knowledge Base links



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

