



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. Therefore, our team has put a step-by-step migration checklist exclusive to Intercom.

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

- Inline images
- KB attachments
- CC in Tickets

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

Note: When importing your conversations and articles to Intercom, their 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.

Note: Whether it is the Demo Migration or Full Migration, all tickets and related data transfer similarly. If some records weren't migrated during the Free Demo, they won't move during the Full Data Migration.

Once Demo Migration is done, check if everything moved correctly. Download reports for migrated, skipped and failed records. Then compare them on the source and target platforms.

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 to inspect the transfer results after the **Full Data Migration**.

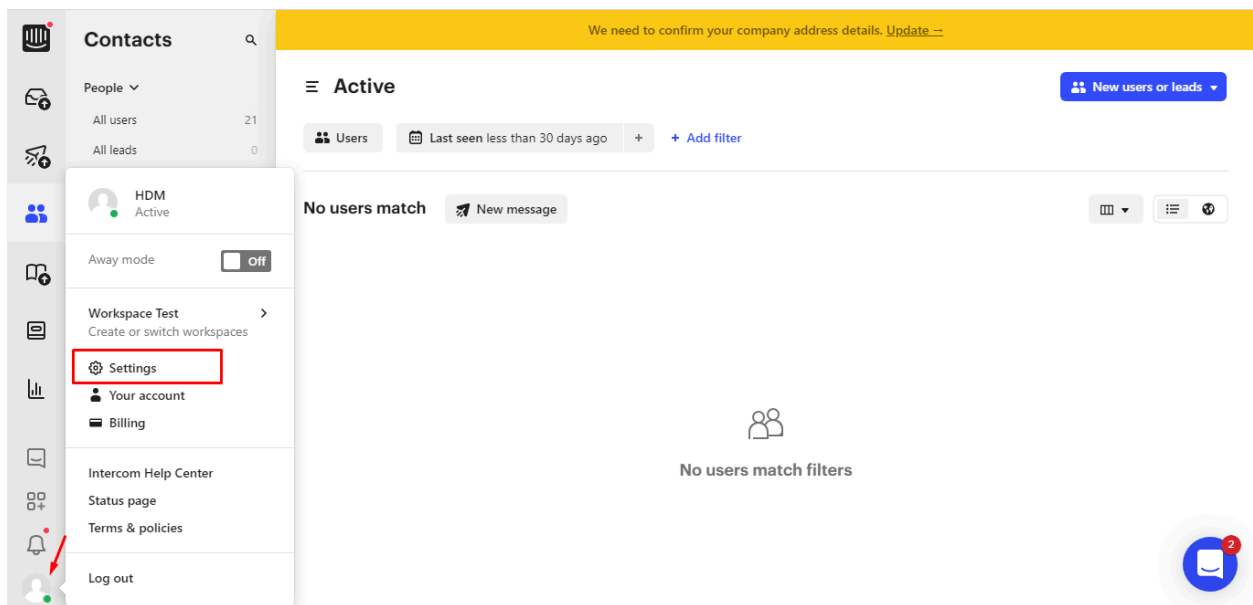


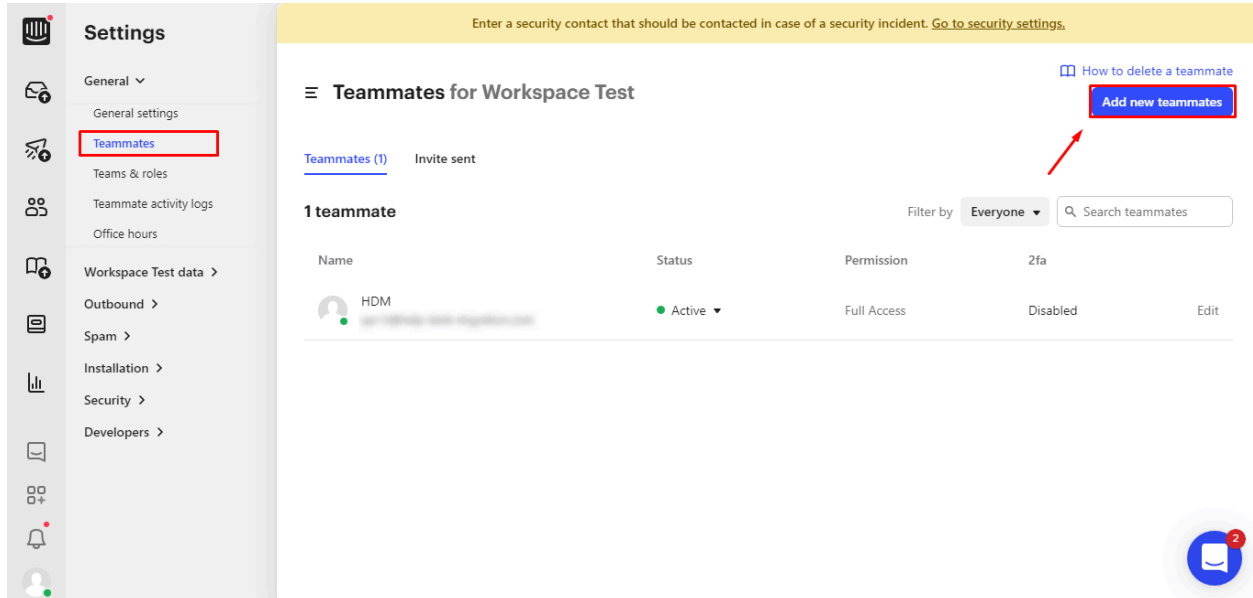
Note: if you want to speed up the **Full Data Migration**, send a request to the Intercom team so they can temporarily increase your API limits before migration.

3. PREPARE INTERCOM FOR THE TRANSFER

Before setting up a data migration itself, run through the following steps:

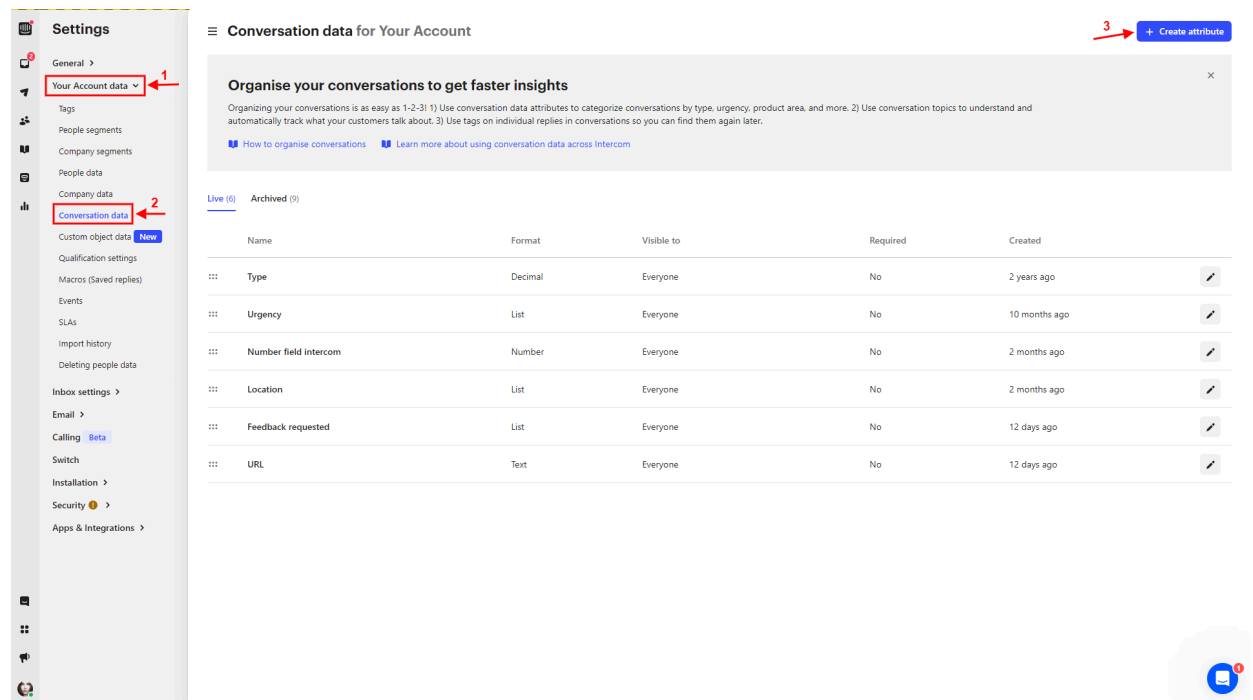
1. Add teammates prior to data migration. Click on the **Profile** icon > **Settings** > under **General**, select **Teammates** > **Add new teammates**.





2. Create matching custom fields. This way, you can map them during the Demo Migration and migrate them correctly.

To create custom fields, click **Settings > Your workspace data > Conversational data > + Create attributes**.



Then select the needed **Format** > fill in the **Name** and **Description** fields > press **Save** to apply settings.

Create a new conversation attribute ×

Format
Aa Text ▾

Name
e.g. Type
This name could appear in conversations with customers if you ever ask Operator to collect this data.

Description
e.g. Type of conversation

Limit visibility
☐ Visible only for conversations assigned to specific team(s)

Required attribute
☐ A teammate will need to complete this before closing a conversation

Cancel Save

You can also set up **Limit visibility** and **Required attribute**.

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
- If the agent requests the ticket, 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. SET UP PHONE NUMBER VALIDATION, NOTIFICATIONS FOR CONTACTS, UNASSIGNED TICKETS, AND NOTIFICATIONS FOR AGENTS

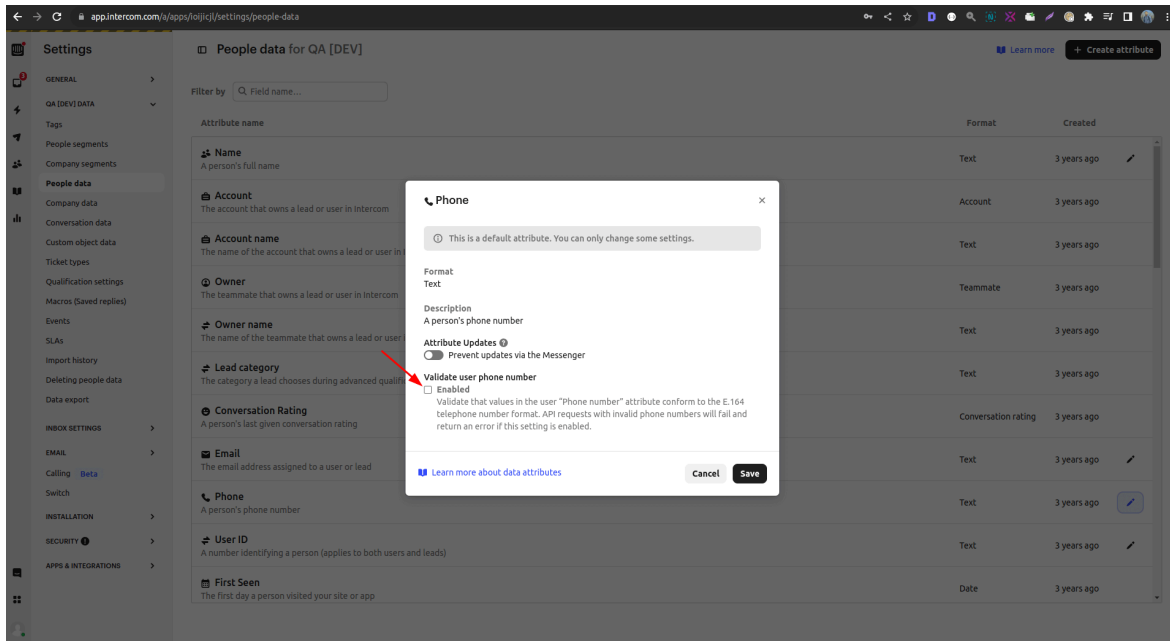
When you employ our Migration Wizard for [Intercom import](#), you can wave goodbye to migration hiccups stemming from pesky invalid phone numbers in your contacts or unassigned tickets. We've fine-tuned the process to make these scenarios a breeze.

1.1. Disable the phone number validation

When you're in the process of migrating your contacts or agents, and you happen to have phone numbers in the mix, here's a nugget of wisdom: If you've got phone number validation switched on, you might just hit a few roadblocks when dealing with invalid numbers. To smooth out the journey, consider taking a detour and disabling phone number validation in your workspace settings.

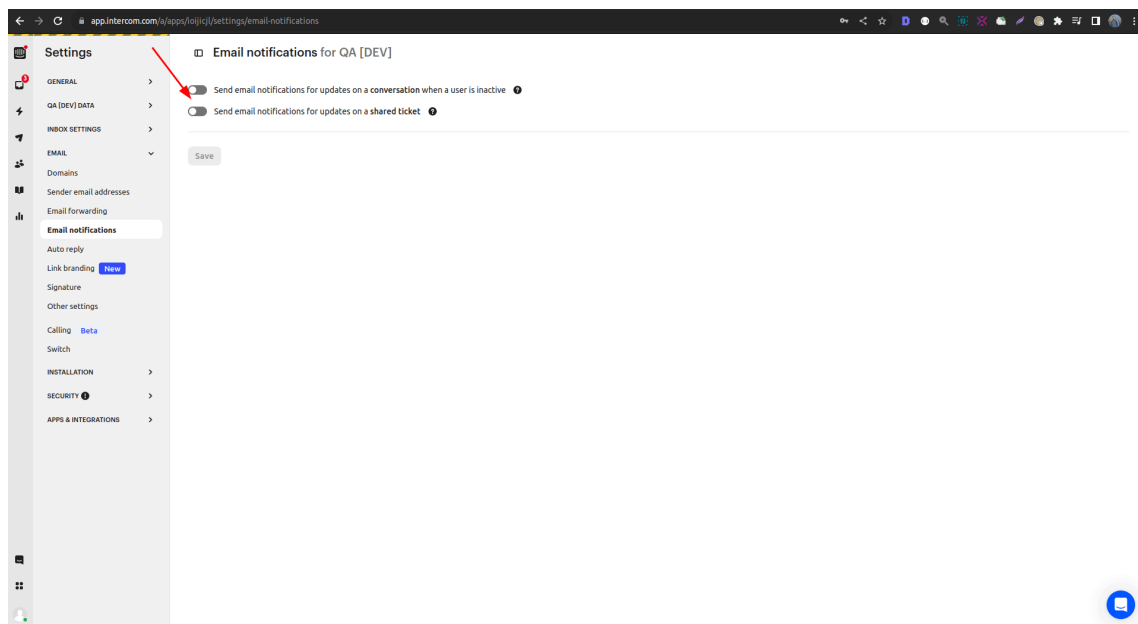


Here's how: **Settings > Your Workspace > People Data > Phone.**



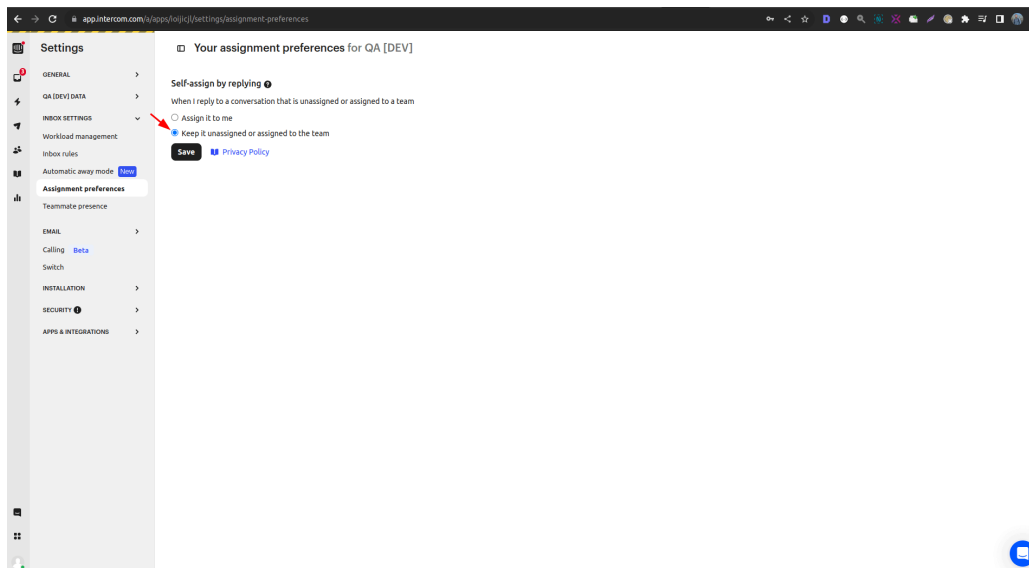
1.2. Turn off notifications for contacts

To disable the notifications for contacts, follow these steps: **Settings > Email > Email Notifications.**



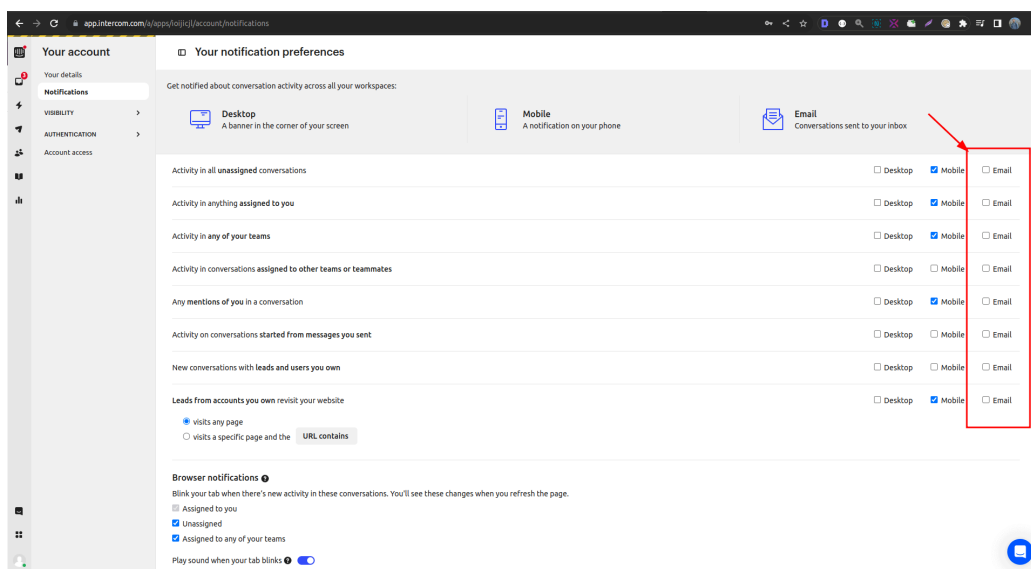
1.3. Migrate unassigned tickets

To ensure a [successful migration of tickets](#) without assigned agents, it's essential to enable default assignment settings. Here's how to do it: **Setting > Inbox Settings > Assignment Preferences**, and then choose "Keep it unassigned or assigned to the team."



1.4. Disable the notifications for support agents

Your support agents can customize their notification settings individually. To do this, visit **Your Account > Notifications**.



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 will 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](#) and teams.
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 the following:

- 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 were migrated
- the customers and companies are migrated correctly
- the attachments are migrated

Note: Check the integrity of imported attachments. Go to your destination platform and download them to see if they were migrated correctly.

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 your source or target help desk systems during the **Full Data Migration**.

If you continue working with your source help desk, remember 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 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 the 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 at 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 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 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

contact@help-desk-migration.com

LOOKING FOR MORE DATA MIGRATION DETAILS?

Let's talk now

