KAYAKO

DATA MIGRATION CHECKLIST

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Data migration brings complexity, effort and expenses. How can you migrate your data over to Kayako with little to no effort? Check this detailed migration checklist, of course.

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Note that Migration Wizard doesn't transfer on default migration such entities to Kayako as:

- Inline images

- CC users

If you still want to move the records listed below, contact our team. Our migration experts will come up with a solution.

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

BEFORE YOU SET UP THE MIGRATION

When you start preparing to your Kayako migration, check out the following:

> **Note**: Tickets and related data are transferred the same way in the Demo Migration and the Full Data Migration. If some customer records weren't migrated during the Demo Migration, they won't be imported during the Full Data Migration.
>
> Download every report on migrated, failed, and skipped records after Demo Migration. Then check how your customer data migrated.

1. CHOOSE A DATE FOR MIGRATION

Select a suitable time and date for Kayako data import to give your team enough time to prepare for the migration.

2. SPEAK TO YOUR TEAM

Tell your agents about data import to Kayako. This way, they have enough time to get used to a new solution. Share certain resposibilities if the process requries that. Your employees can help you filter data or exam the results after the Full Data MigrationSend a reminder about data migration.
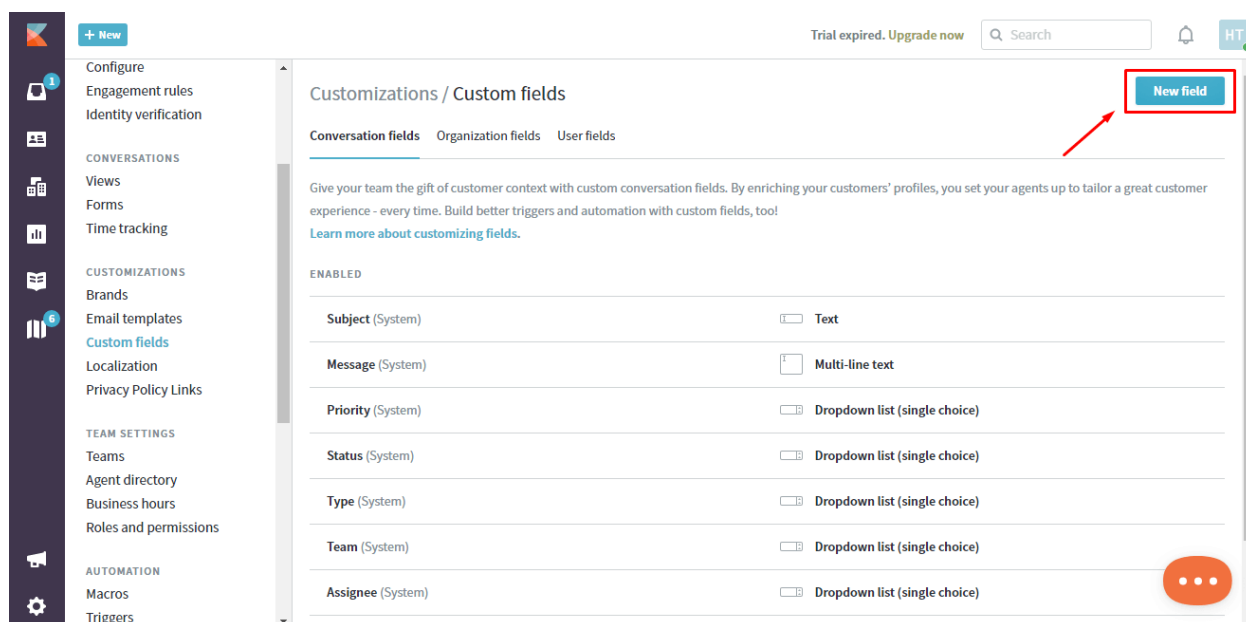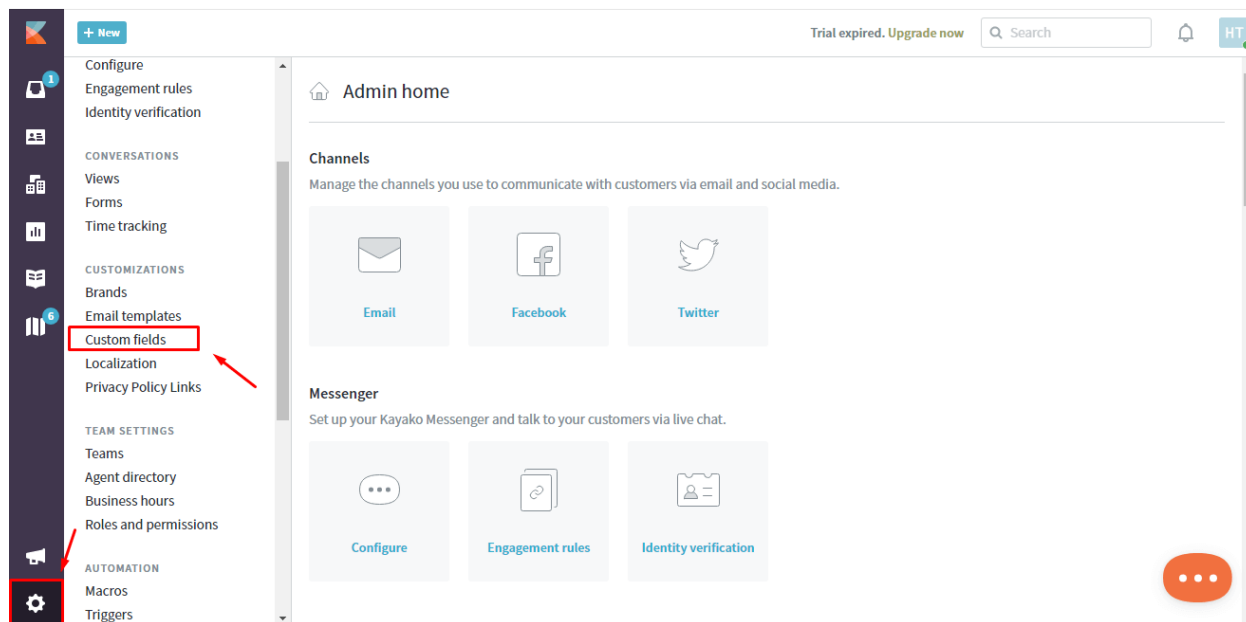
3. PREPARE KAYAKO FOR THE MIGRATION

1. **Create custom fields**

The right custom fields can help you locate all records after data migration. Besides, they should correspond to your ones on a source platform.

To create custom fields: go to the **Agent** area > **Administration** > click **Custom fields** under **Customization** > **New field**.

2. Add agents

Before migration, you need to have at least one agent on Kayako. There are two options:

1) Add missing agent profiles in Migration Wizard while matching agents. Choose one agent or all of them.

2) Create agents in Kayako. Note that agents' profiles should contain the same email as the source platform.

Go from the **Agent** area to **Administration** > click **Agent Directory** under **Team settings** > **Invite Team Member**.

> **Note**: If you have any deleted, unassigned, or inactive agents, choose a default agent while matching agents.
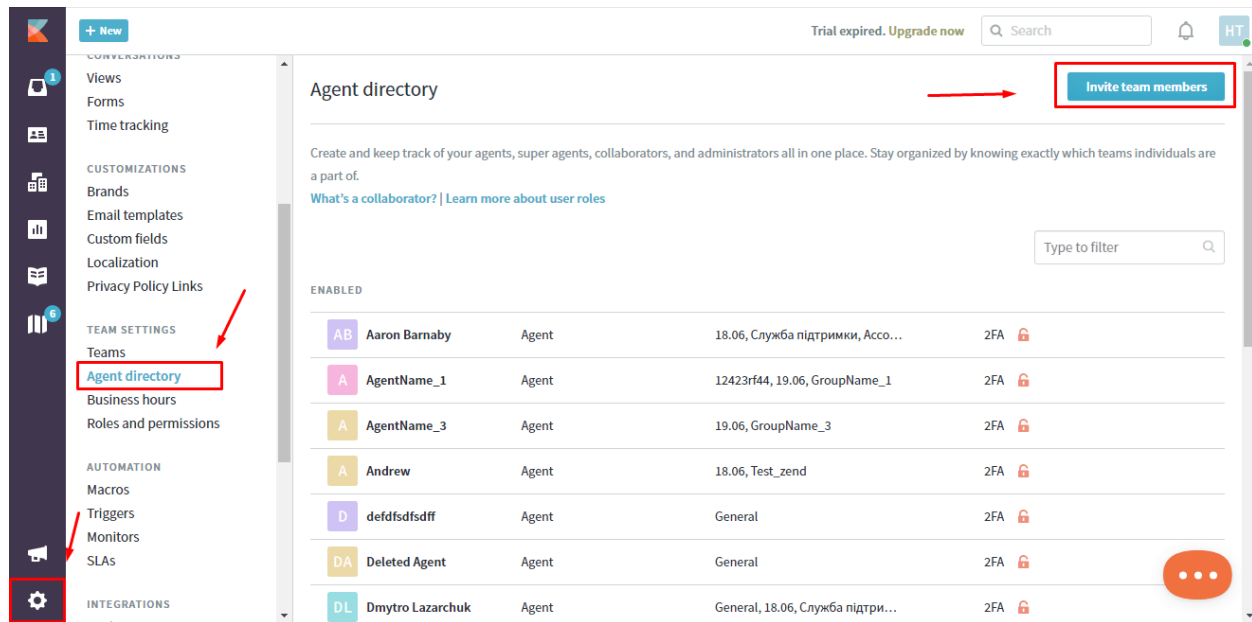
> Ensure you have admin rights to both your accounts in the source platform and Kayako to run a data migration.

4. CONSIDER KAYAKO PECULIARITIES

Before the Full Data Migration to Kayako you should know:

- There are [agents and collaborators in Kayako](#). Only agents can communicate with customers, while collaborators can only communicate internally with customers.

- You should confirm your agent's activation via email.

- When migrating Knowledge Base content, allow potentially [unsafe HTML in Help Center articles](#) in the admin panel. Kayako blocks the outsource links to provide safety for its users, so if you want all of your links to work, make sure not to skip this step.

- Our tool can't migrate cases of deactivated agents.

- If you migrate from Kayako Classic to Kayako and want your users to access the Help Center via the same URL, do not switch to DNS (Domain Name Service, a.k.a. your Knowledge Base URL) before migrating. Do it afterward to keep all attachments.

- CC users do not migrate. However, you can still migrate emails of CC users into a custom field. Or, opt for customization and migrate CC users over to Kayako.

5. CONSIDER CUSTOMIZATION OPTIONS

If you have any specific requirements for data migration, contact our support team. We offer an option like

- Data filtering by different criteria (creation date, tags, custom fields, groups, organizations, assignees)

- Change of the default migration process (customer custom fields, migration of change and problem objects as tickets, migration of ticket events as private notes, emails of CC users into a custom field, migration of the information related to inactive users)

- Adding information to the migrated data (marking tickets with extra tags, adding legacy ticket ID to the ticket subject)
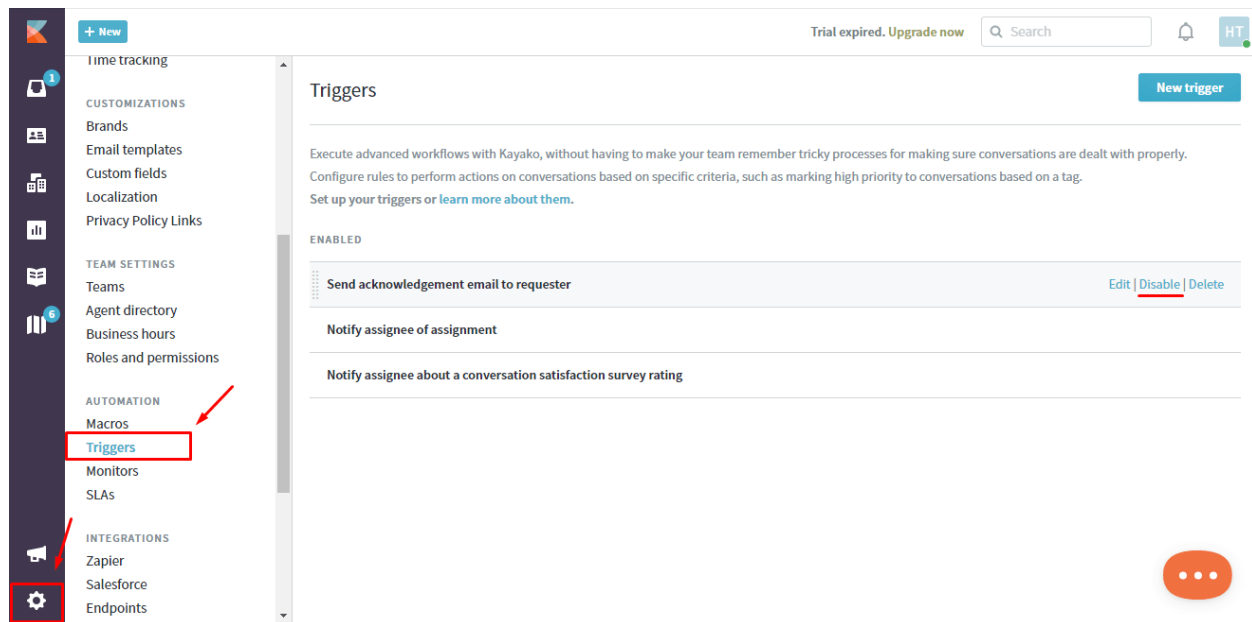
YOU'RE ALMOST READY

1. TURN OFF NOTIFICATIONS

Switch off Email Notifications, Monitors, and any triggers before starting the migration to avoid data changes.

Go to **Administration** > Click **Triggers** under **Automation** > Disable the needed triggers.

2. FIND ACCESS CREDENTIALS

When running a Demo Migration, you need access credentials to the source platform and Kayako.

To connect Kayako with Migration Wizard, you need:

1. **URL**: URL of your company's Kayako account.

2. **Email**: Email to your Kayako account.

3. **Password**: Password to your Kayako account.

3. RUN A DEMO MIGRATION

Instead of running the Full Data Migration right away, set up a Free Demo. In short, our tool moves 20 random tickets from your old help desk to Kayako during the trial. Repeat the process as many times as you need.

1. Log in to Migration Wizard.

2. Connect your source and target platforms.

3. Select the data you want to import.

4. Match agents and groups.

5. Map tickets and articles route.

6. Pick up [automated options](#).

7. Set up your Free Demo Migration.

> **Note**: When using a brand new Kayako account, confirm Channel with a post-registration email. Otherwise, the demo migration will fail.

AFTER THE DEMO MIGRATION

CHECK THE RESULT IN KAYAKO

Once your Free Demo finishes, check a table with four columns:

- all available records

- migrated records

- failed records

- skipped records

And download reports to check the migration results. Pay attention to:

- all comments got migrated and if the authors of the comments are the same

- the tickets are assigned to the correct agents

- all the custom fields got migrated, along with attachments and labels

- the customers and companies are migrated correctly

- if you have any skipped records, reach out to our support reps

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

For more information, [read the detailed guide](#) on checking the results of Demo Migration for Kayako.

BEFORE THE FULL DATA MIGRATION

1. SELECT YOUR MIGRATION FLOW

Keep the process consistent, you should decide on which help desk system you are going to work during data transfer: the current or desired platfrom.

If you work on the source help desk system, note that records created or updated during the process won't get migrated. In this case, opt for [Delta Migration](#) to import them later. The Delta option is available in [Signature support plan](#).

While the **Full Data Migration** is going on, check out the progress in Migration Wizard anytime or wait for our support reps to contact you.

2. START FULL DATA MIGRATION

Our automated migration service moves each record one by one. That's why the process might take from 20 minutes to several days depending on the volume of help desk records.

The Full Data Migration starts after

- **Your payment is confirmed**. It may take some time; that's why make a transaction in advance or schedule data migration.

- **You've agreed to the checklist**. Click on the corresponding checklist with a mini-guide. Run through all steps and put a tick in a checkbox.

Note: Speed up your Full Data Migration timing by requesting Kayako temporarily to increase your API limits.

3. DON'T CHANGE ANYTHING

Any changes to source data can fail your migration, or your data import will take more time. Better audit migrated records on Kayako after the data migration.

If you have new tickets coming into your source help desk, you can opt for the [Delta Migration](#) to migrate them to Kayako.

AFTER THE IMPORT IS DONE

1. EXAMINE EVERYTHING

Check the results of your Full Data Migration to know if your data migrated correctly. You have five days to study all reports until your Migration would be archived.

If you can't find something, check if you've set up suitable search filters for all tickets and any time. If you still can't find the needed data, [drop a line](#) to our migration experts.

2. SET UP A NEW PLATFORM

- Redirect all your incoming support channels to Kayako

- Enable the notifications you previously had to turn off

- Update the internal links in Knowledge Base (if you migrated one)

- Reforward your emails to the platform

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