



Help Desk Migration

RE:AMAZE

DATA MIGRATION CHECKLIST



Table of Contents

BEFORE YOU SET UP THE MIGRATION	3
1. CHOOSE A DATE FOR MIGRATION	3
2. SPEAK TO YOUR TEAM	3
3. CONSIDER CUSTOMIZATION OF YOUR MIGRATION	3
YOU'RE ALMOST READY	4
1. TURN OFF NOTIFICATIONS	4
2. FIND ACCESS CREDENTIALS	4
3. RUN A DEMO MIGRATION	5
AFTER THE DEMO MIGRATION	5
BEFORE THE FULL DATA MIGRATION	6
1. SELECTING MIGRATION OPTIONS	6
2. LAUNCH THE FULL DATA MIGRATION	6
3. DON'T CHANGE ANYTHING	6
AFTER THE IMPORT IS DONE	6
1. EXAMINE EVERYTHING	6
2. SET UP A NEW PLATFORM	7
WHY MIGRATING WITH US	8



Data migration between two different help desk solutions can be challenging because of the amount of work you need to do. For that reason, we've set up a migration checklist exclusive to Re:amaze.

Before studying this guide, note that Migration Wizard doesn't transfer such records to Re:amaze:

- Organizations
- Groups
- Inline images
- Knowledge base attachments
- Custom fields
- CC in tickets

If you want to migrate those records, [reach out to our team](#) to plan a custom migration workflow.

Note: The dates on your articles will change dates will change to the data migration date if you're importing your Knowledge base to Re:amaze.

BEFORE YOU SET UP THE MIGRATION

Note: Ticket and related data migrate during the Demo Migration the same way it will be transferred during the Full Data Migration. It means that if something doesn't move or/and migrates incorrectly during the Demo Migration, it won't be imported during the Full Migration.

When the Demo Migration is complete, download reports for migrated/skipped/failed records. Then ensure that every record type migrated correctly.

1. CHOOSE A DATE FOR MIGRATION

Choose the right date for your data migration and give your agents enough time to prepare. And data importing process might last from twenty minutes to a couple of days.



2. SPEAK TO YOUR TEAM

Notify your team about data migration to Re:amaze. So they have enough time to adjust to a new platform. Share certain responsibilities. Your agents can help you examine the results after the Full Data Migration.

3. CONSIDER CUSTOMIZATION OF YOUR MIGRATION

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, organizations, assignees)
- Change of the default migration process (migration of the information related to inactive users, emails of CC users into a private comment, information from custom ticket fields into a private comment, inline images as attachments, etc.)
- Adding information to the migrated data (marking tickets with extra tags, adding legacy ticket ID to the ticket subject)

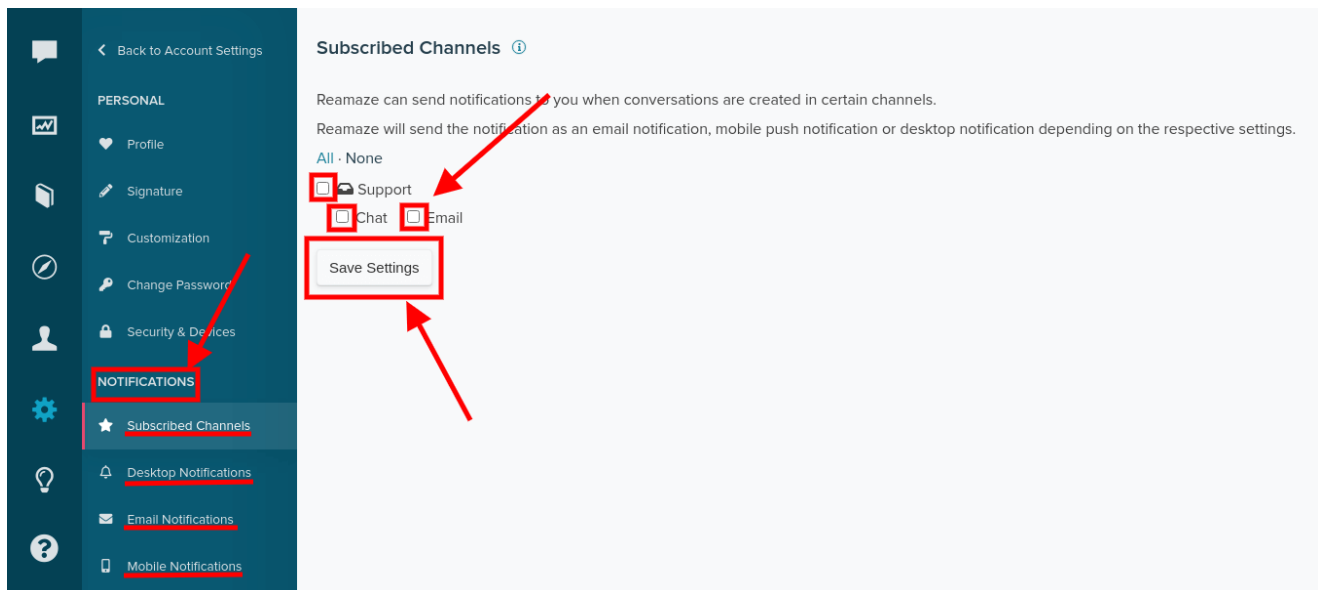
YOU'RE ALMOST READY

1. TURN OFF NOTIFICATIONS

Disable notifications so your agents won't get numerous emails during the Full Data Migration.

Click on your **profile icon** > choose **Notification Settings** > go to **Notifications** > uncheck all the fields in the **Subscribed Channels**, **Desktop Notifications**, **Email Notifications**, and **Mobile Notifications** sections > **Save Settings**.





2. FIND ACCESS CREDENTIALS

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

To connect Re:amaze with our tool, you need:

1. **URL:** URL of your company's Jira Service Management account.
2. **Email:** Email to your Reamaze account.
3. **API Token:** Settings > under DEVELOPER SETTINGS, choose API Token > Generate New Token.

3. RUN A DEMO MIGRATION

Set up a Free Demo before running the Full Data Migration right away. Migration Wizard imports 20 random tickets and 20 articles from your current help desk to Re:amaze. You can edit settings and re-run your Demo several times. But note with the same settings, the Demo results won't be different.

1. Sign in to your Migration Wizard account.
2. Connect your source and target systems.
3. Define the data you want to transfer.
4. Match [agents](#).
5. Map tickets and articles.



6. Pick up the available [automated options](#).
7. Set up your Free Demo Migration.

Note: If your target platform is Re:amaze, you can add a tag to the migrated tickets.

AFTER THE DEMO MIGRATION

After a Free Demo Migration, check the results and download reports on migrated, failed, and skipped records. Be sure to inspect the following aspects:

- the comments migrated successfully, and the authors of the comments correspond in your source and target platforms
- the tickets are assigned to the correct agents
- the customers, and the attachments migrated correctly (download the attachments from your destination platform to check if they were transferred properly)

Note: if something hasn't transferred during Free Demo, it won't move during the Full Data Migration.

[Read a guide](#) exclusive to Re:amaze if you need more detailed information.

BEFORE THE FULL DATA MIGRATION

1. SELECTING MIGRATION OPTIONS

During the Full Data Migration, you can work with a source help desk. However, the created or updated records won't migrate to Re:amaze. Workaround this with the **Delta Migration** not to lose that data. Or you can use a target help desk.

Delta Migration is available in the [Signature support plan](#).

As the **Full Data Migration** goes in cloud. That means you can check how your data transfer is going in Migration Wizard. Or wait for our support team to reach out to you.

2. LAUNCH THE FULL DATA MIGRATION

The Full Data Migration starts if:



Help-Desk-Migration.com

contact@help-desk-migration.com

- **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.** Follow all steps, put a tick in a checkbox.

Depending on the number of records you have, the migration might take from 20 minutes to a few days.

3. DON'T CHANGE ANYTHING

Don't make any changes during the Full Data Migration. Any alteration can cause longer data migration time or your record transfer may fail.

AFTER THE IMPORT IS DONE

1. EXAMINE EVERYTHING

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

If you keep looking for some records, ensure that you have set up the right search filters. If the problem remains, [drop a line](#) to our support team.

2. SET UP A NEW PLATFORM

- Enable all the notifications that you had to turn off previously
- Redirect email forwarding
- 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

