TEAMWORK DESK
DATA MIGRATION CHECKLIST
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Data migration might be challenging and time-consuming. And for enhancing your planning, we complied a Teamwork Desk migration checklist.

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Acknowledge that Migration Wizard doesn't import following records to Teamwork Desk in a default migration workflow:

- Organizations
- Groups
- Inline Images
- 'Created at' Dates for Tickets and Comments
- Comments' Authors
- CC in Tickets

But the listed data types can be imported in a Custom Migration, contact our support team to discuss details of your tailored migration.

**Note:** After importing your Knowledge base to Teamwork Desk, article dates will have the date of data migration.

**BEFORE YOU SET UP THE MIGRATION**

**Note:** Tickets and related records migrate similarly during the Demo Migration and Full Data Migration. If some customer records weren't transferred during the Free Demo, they won't be exported during the Full Data Migration.

Be sure to download all reports for migrated/skipped/failed records after Demo Migration. Then open them up and compare them to your source and target data.

**1. CHOOSE A DATE FOR MIGRATION**

Pick up the date for your Teamwork Desk import to have enough time to prepare for the actual transfer and consider all source and target platform specifications. Often, companies select the day with the smallest workload or start their migration at the end of a work day.

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contact@help-desk-migration.com
2. KEEP YOUR TEAM UPDATED

Notify your agents about data import to Teamwork Desk. It would give them time to learn how to work with a new help desk. And delegate some responsibilities, for example, inspect the migration results after the Full Data Migration. Also, you can set a reminder a day before migration.

**Note:** To speed up the Full Data Migration, send a request to the Teamwork Desk to increase your API limits before migration. Warn our team about that too.

3. PREPARE TEAMWORK DESK FOR THE TRANSFER

1. Create agents

To *create agents in Teamwork Desk:* Log in > People > Agents > Invite Agents > fill in the first and last name, email address, and agent type > Next > select the Inboxes > click Send.

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Note:

a) you can also turn agents into administrations
b) the agent email on a target platform should correspond to the ones on a source platform
c) your agents should accept an invitation from you to become active
d) do not deactivate users before the migration process, as our tool won’t transfer their tickets
2. Create custom fields

To create a custom field in Teamwork Desk: click on your profile’s icon > Settings > General > Custom Fields > + Add Field > type in the custom field’s name and field type > Next > pick the inbox instances > Save.

**Note:** you can apply the created custom field to all future inbox instances.
4. CONSIDER CUSTOMIZATION OPTIONS

Reach out to us if you have any specific requirements for Teamwork Desk migration. For example, you can request customization like:

- Data filtering by different criteria (creation date, tags, custom fields, organizations, assignees)
- Change of the default migration process (migration of change and problem objects as tickets, migration of ticket events as private notes, inline images as attachments, etc.)
- Adding information to the migrated data (marking tickets with extra tags, 'created at' dates and 'comments' authors' in a body of comments)

Note: The available automated options depend on your source platform.
YOU’RE ALMOST READY

1. TURN OFF NOTIFICATIONS

Disable the notifications to prevent your end-users and admins from receiving unnecessary emails.

To disable notifications in Teamwork Desk:

Click on your profile icon > View Profile > Notifications > disable all active notifications > Save.
2. DISABLE TRIGGERS

To disable automatic triggers in Teamwork Desk:

Log in > click your profile icon > Settings > Inboxes section > pick the required inbox > Triggers > turn off all triggers.

**Note:**
- a) You need to log in to the account with the Admin rights
- b) Switch to your Teamwork Desk account to disable all triggers. You can't switch them off in a Dashboard
- c) You need to turn off triggers in all Inboxes

3. FIND ACCESS CREDENTIALS

When setting up you Demo Migration, you need admin access credentials to the source platform and Teamwork Desk. To connect Teamwork Desk to Migration Wizard:

1. **URL**: URL of your company’s Teamwork Desk account.
2. **OAuth authentication**: Log in with your Teamwork Desk account.

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4. RUN DEMO MIGRATION

Take advantage of Free Demo Migration to move a sample of data. To see how the records looks on Teamwork Desk and whether you need to customize the default migration process to your business needs.

1. Sign in to your Migration Wizard account.
2. Connect your source and target solutions.
3. Pick up the data you want to import.
5. Map tickets and articles fields.
6. Select the available automated options.
7. Proceed with your Free Demo Migration.

AFTER THE DEMO MIGRATION

1. CHECK THE RESULTS IN TEAMWORK DESK

Your Free Demo is complete so you need to review the results and download reports on migrated, failed, and skipped records.

While inspecting the migrated records, pay attention to:

- all the comments got migrated
- the tickets are assigned to the correct agents
- the customers, the companies, the custom fields, and the attachments migrated correctly

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

For more information, read the detailed guide on Free Demo checking.

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2. REQUEST A CUSTOM DEMO

If the one time demo with importing tickets by ID wasn’t enough for your testing, you can ask for a Custom Demo. Contact our team to discuss all the requirements.

BEFORE THE FULL DATA MIGRATION

1. CHOOSE THE MIGRATION WAY

During the Full Data Migration, you can work with your source and target help desk systems. However, if you choose to use a source platform, the records created or updated during the process won't get migrated. To fix it, you can run Delta Migration to import them after the main data import is finished.

While the Full Data Migration is running, you can check out the progress in Migration Wizard anytime you want or wait for our team to contact you.

Note: the feature of Delta Migration is available in Signature support plan.

2. LAUNCH THE FULL DATA MIGRATION

During the Full Data Migration, Migration Wizard imports records one by one. Depending on the volume of your records, data migration might take from 20 minutes to a few days.

The Full Data Migration begins after your payment is confirmed. It may take some time; that's why make a transaction in advance or schedule data migration. And you've run through all steps of before migration checklist and put a tick in a checkbox.

AFTER THE IMPORT IS DONE

1. EXAMINE EVERYTHING

Full Data Migration is completed, check the results on your Teamwork Desk. You have five days to check the results until Migration Wizard archives your 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 disabled notifications and triggers
- Update the Knowledge Base links
- Set the necessary settings
- Configure email forwarding

To configure email forwarding to Teamwork Desk:

Go to your profile icon > Settings > Inboxes > choose a needed Inbox > Email Settings > set up the necessary modifications with the forwarding email address.
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.

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**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).

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LOOKING FOR MORE DATA MIGRATION DETAILS?

Let’s talk now