ZENDESK

DATA MIGRATION CHECKLIST

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You need two things to run a successful Zendesk migration. The first is a [detailed checklist](#) covering everything from A to Z. The second is a reliable third-party service like Help Desk Migration that takes the heavyweight of data transfer upon its shoulders.

Note that in a default migration our Migration Wizard doesn't transfer to Zendesk

- Inline images (but it is available as a pre-built option – migrate inline images as attachments)

- [Links between knowledge base articles](#)

You can request nearly any adjustments to the importing process in a custom data migration. [Contact](#) our team to discuss the details.

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

BEFORE YOU SET UP THE MIGRATION

Quick fact: about 60% of efforts during the data migration process goes to preparation and planning. So, before proceeding with data migration, check the following:

> **Note:** All tickets and related data migrate in the same way in the Demo Migration or Full Data Migration. If some ticket data did not migrate or/and was incorrectly transferred during the Demo Migration, it will also happen during the Full Data Migration.
>
> To check if everything migrated correctly, download the Demo reports for migrated/failed/skipped records. If you face any issues, reach out to our support team.

1. BUILD A MIGRATION STRATEGY TO FIT YOUR SITUATION

There is no single correct way you can approach your migration. Looking back at our experience of running data migrations for customers, we come up with two types of successful data migration:

1. Automated or custom data migration

2. Automated or custom data migration + Delta migration

In this [checklist,](#) you can find more detailed descriton on how these help desk migration can be planned and performed.

2. KEEP YOUR TEAM UPDATED

Ensure you created a transparent workflow and give enough knowledge and time to start closing tickets for migration. Besides, agents have enough time to get used to Zendesk.

Expert tip: Remind your employees about the migration a day before to prevent any accidental work on tickets in your old help desk. Send an email with a reminder or create a calendar event.

3. HISTORICAL DATA FILTERING

Every business has specific needs to preserve the historical records, or delete them, or transfer certain data to their Zendesk. We offer a custom filtering of your records to meet your business needs in the best way. Drop us a line to discuss the criteria you want to apply and what data to filter.

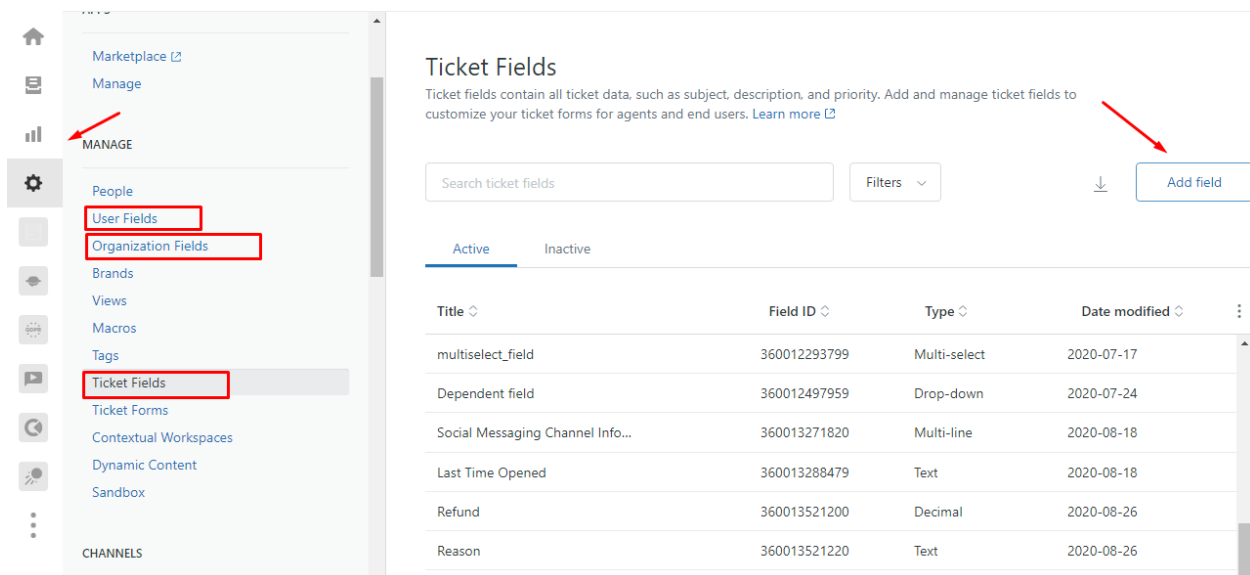## 4. PREPARE ZENDESK FOR MIGRATION

You need to prepare Zendesk:

1. Create custom fields with a matching 'type'. It enhances the mapping and allocation of the records after the migration. Zendesk includes custom fields available for tickets, users, and organizations.

You can *create custom ticket fields* manually in advance.

a) Go to **Admin → Manage →** Choose **User/Organization/Ticket** fields → Click **Add field**.

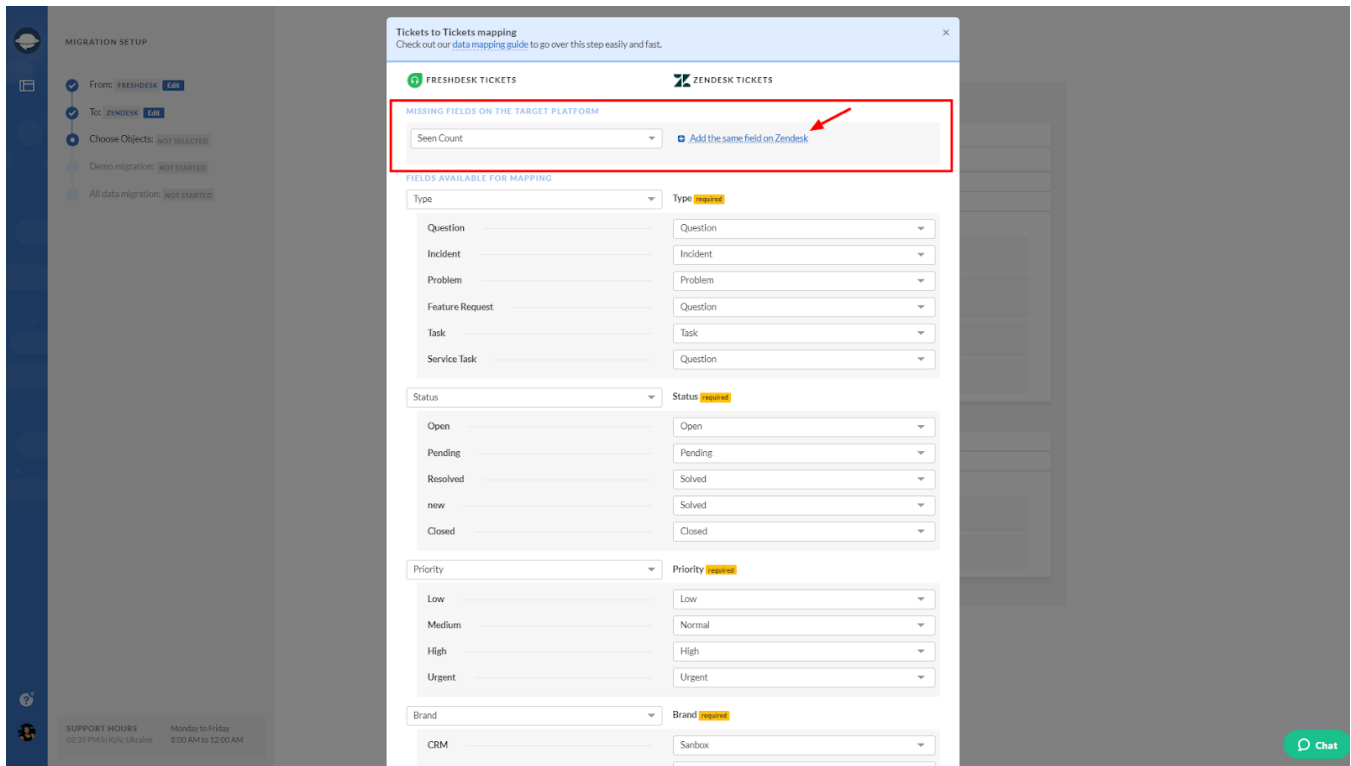b) Create custom fields in the Migration Wizard when setting up the migration.

Select the source field you want to map and click **Add the same field in Zendesk**. Wait for a few seconds while the Wizard creates the field. Once you've created the field, map its values.

Your custom fields should have a default setting and be mapped as 'Unrequired. Otherwise, the field will remain empty.

To map custom fields of Contact and Organization, reach out to our team to request a custom mapping of these field types.

2. Setup saved replies (macros). Assess which macros you might need in Zendesk. As for shared macros (created for everyone on the team to use, it is better to keep them.

To create macros in Zendesk, go to **Admin → Macros → Add Macro**.
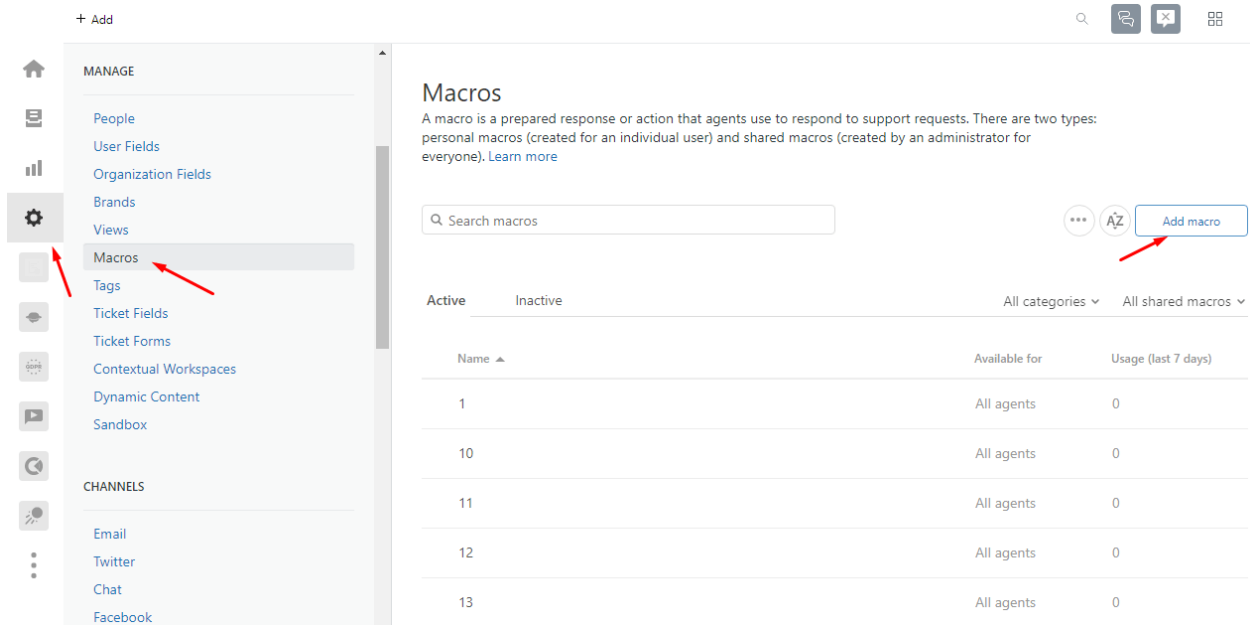
3. Agent profiles. Migration Wizard sets up the agent profiles during the migration and uses only the slots available in your account.

If you have any unassigned, deleted, or inactive agents, select a default agent on Zendesk while mapping agent profiles.

4. Help center activation. If you are planning to import your knowledge base articles to Zendesk, then you need to be an account owner for activating help center. That can be done in Guide > Settings on the sidebar > click **Activate**.

5. STUDY THE PECULIARITIES

Pay attention to Zendesk's peculiarities and limitations:

1. When migrating to Zendesk, your suspended Contacts will change their status to unsuspended; suspended contacts can't be the requesters in Zendesk.

2. You cannot migrate tickets without contacts, organizations, and agents. These fields should be filled in.

3. After 28 days, tickets marked as 'Solved' will automatically get updated to 'Closed'. And after 120 days of being 'Closed', tickets are automatically archived. It happens because of specific automation settings. You can reduce the number of days until they become 'Closed', but you can't expect tickets to stay 'Solved' until you manually close them.

4. Zendesk does not show all ticket statuses in the main menu by default. To view all tickets, type * in the search bar and press the Enter key. This is the only way you can locate archived tickets.

5. The tickets get relevant tags assigned automatically by Zendesk based on the custom field options.

6. Only default language migrates by default for the Zendesk Guide.

7. The agent roles you see on Zendesk depend on your subscription plan. For example, an administrator role defines everything in your account. A light agent role can leave private comments on tickets, but cannot be a closed ticket owner, etc. If you are an Enterprise plan user, ensure all of your agents receive the Staff role to solve the tickets.

8. Each subscription plan has a limited amount of agents. Consider upgrading if you want to preserve the same number of agents you had on your source help desk. If you don't migrate specific agents to Zendesk, contact our team to reassign their tickets.

9. Tickets without the agent get assigned to a default agent in Zendesk. Pick up a default agent while mapping agent profiles.

10. You cannot store Knowledge Base Articles in categories, only in folders. If you had no folders on the source help desk, the articles would migrate to a default folder created automatically by the migration tool. Also, make sure that Zendesk Guide is activated.

11. If you want to migrate articles to a particular brand, put its link in the URL field while connecting your Zendesk account.

12. By default, Zendesk is configured to block unsafe HTML tags and attributes, to ensure that your customers can safely browse your knowledge base. For example, videos migrated as a part of Knowledge Base articles are referred to as unsafe content. To display them, go to Settings> Guide Settings, find Security, and check the Display unsafe content option.

13. There are several types of tickets which migrate differently. For instance, merged tickets migrate as separate ones with private messages. Follow-ups transfer as one ticket. In the custom migration, you can transfer follow-ups that contain ID into a custom field or private note.

14. The tickets CC field doesn't migrate, but all the other people's replies get reflected on the ticket. You can move those records to Zendesk from: Cayzu, FreeScout, Freshdesk, Freshservice, Help Scout, SupportPal.

15. The order of tickets during migration depends on your source help desk API. It controls the process and determines whether new or old tickets get transferred first. Our service migrates the users and then tickets, to maintain the user-ticket relation.

16. Set up mandatory and regex fields after the data migration. Regex fields in Zendesk only support such formats as yyyy-mm-dd date, URL validation, five-digit zip codes, and social security number in a pattern of 3-2-4 and each separated by a dash.

6. CUSTOMIZE YOUR MIGRATION

Our team can customize your migration to meet your needs precisely. Or you can tailor your data import with out-of-the-box custom options like:

- ticket tagging

- migrating inline images

- skipping attachments

- one time Demo with custom data (*for tickets and articles)

- migrate content translations

- migrate ticket side conversations

HELP DESK OBJECTS

☑	Groups	⇄ Match items	Groups
☑	Agents	⇄ Match items	Agents
☑	Organizations	⟩⟩⟩	Organizations
☑	Customers	⟩⟩⟩	Customers
☑	Tickets	⚙ Map fields	Tickets

☑ **Add a new tag to tickets**
Mark the migrated tickets with tag(s) and sort them out easily on your destination platform

imported ⊗   Add tag and press comma

☐ **Skip attachments**
Keep ticket attachments, or leave them behind to save storage space or migrate faster

☑ **Migrate call recordings**
Move all your call recordings as attachments

☐ **Demo with custom data**
Choose up to 20 records by IDs and import them to check how the data lands on a target

☐ **Migrate side conversations**
Move all your side conversations

KNOWLEDGE BASE OBJECTS

☑	Categories	⟩⟩⟩	Categories
☑	Sections	⟩⟩⟩	Sections
☑	Articles	⚙ Map fields	Articles

☑ **Migrate content translations**
Import language versions of your KB articles

☐ **Demo with custom data**
Choose up to 20 records by IDs and import them to check how the data lands on a target

When migrating to Zendesk, you can **add tags** to identify the migrated data. You can also **migrate inline images as attachments**. Note that this option can take longer to migrate data.

Besides, you can **skip attachments** to speed up data migration. If you got a multilanguage Help Center, choose to **migrate content translations**. Finally, if you want to test our Migration Wizard with a specific set of data, choose **one time Demo with custom data** for both tickets and articles.

Expert tip: Among the popular customizations for Zendesk migration, we can suggest you to consider:
- 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, 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)

Reach out to our support team if you have other custom work in mind.

YOU'RE ALMOST READY

1. TURN OFF AUTOMATIONS

Switch off automations in Zendesk if you don't want any changes to the migrated data.

Go to **Admin** → **Business Rules** → **Automations** → Hover over the automation you want to deactivate→ Click the three dots and then "**Deactivate**."

You need to go through each automation and deactivate it.

Expert tip: If you can't switch off automations, select "Add a new tag to the migrated tickets" while data mapping. Then go to Zendesk and set up specific rules for notifications and automations so they won't get triggered on the tickets with the added tag.
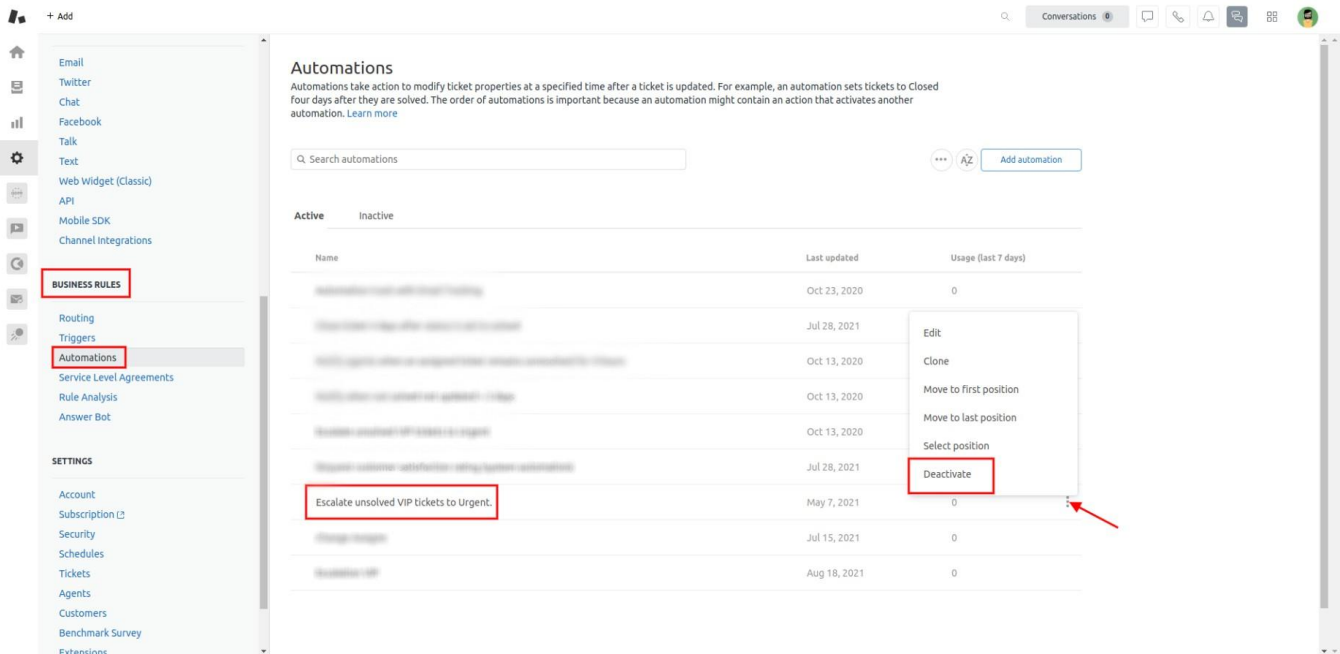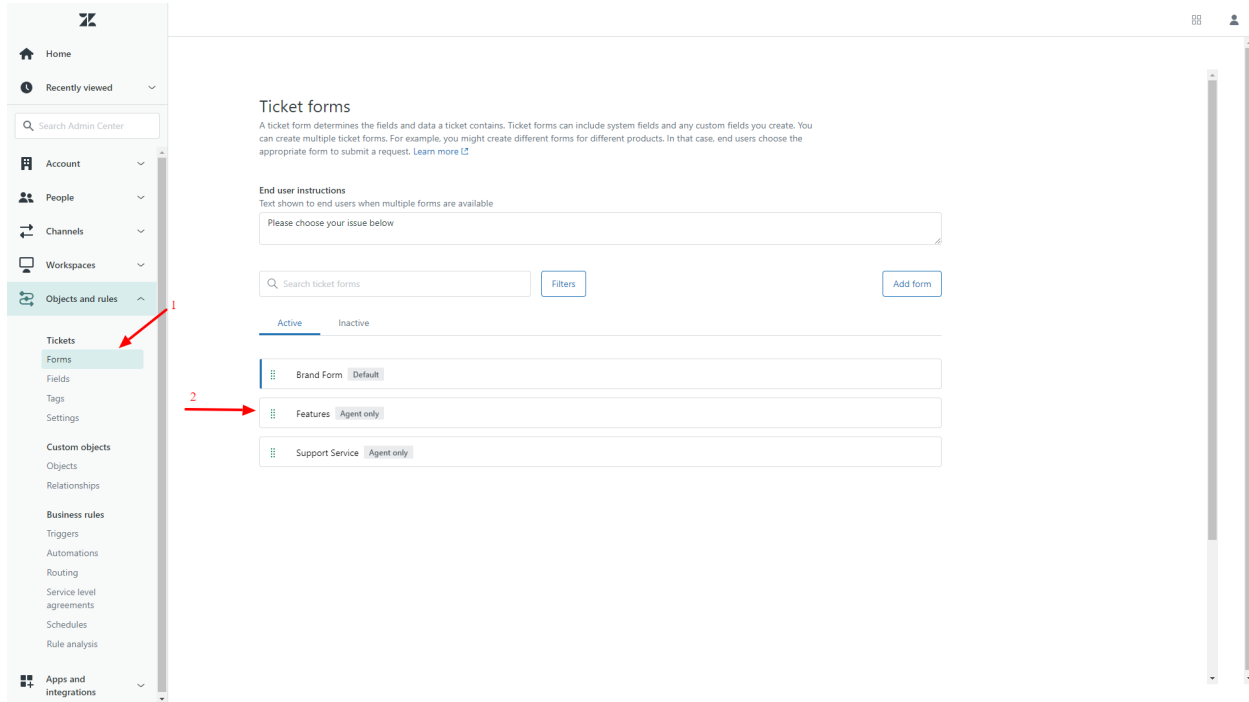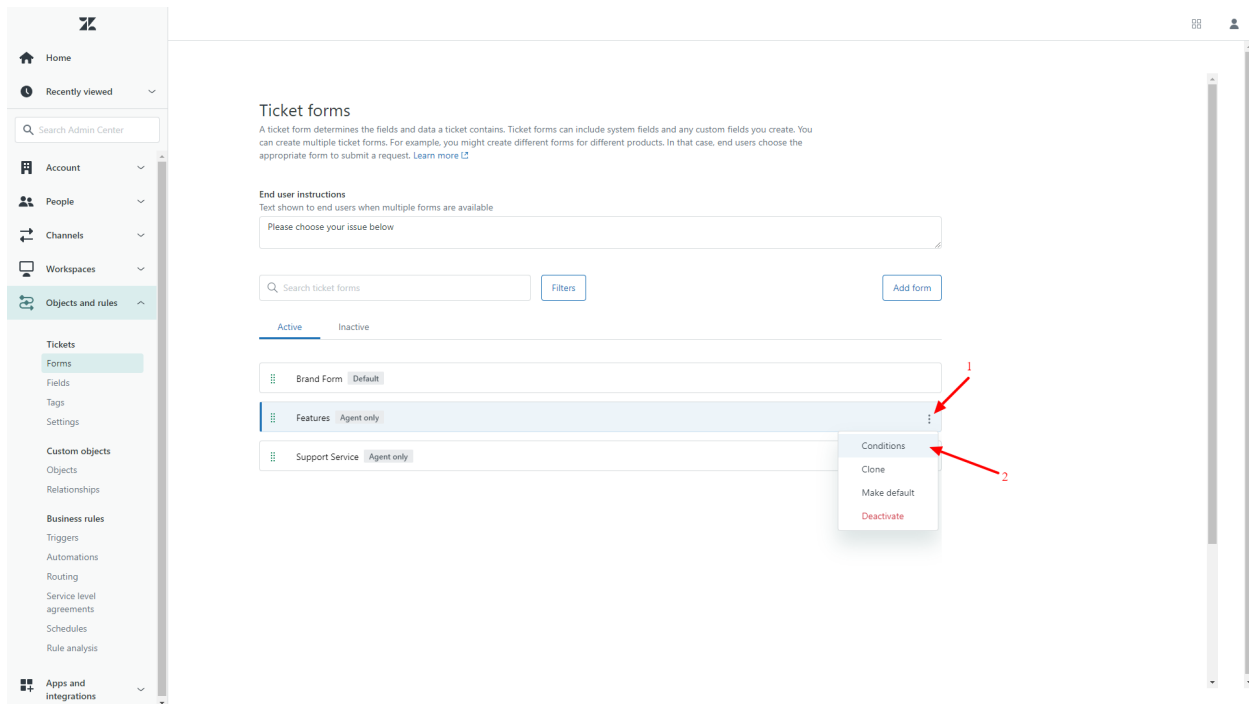
2. DEACTIVATE CONDITIONS

To ensure your migration goes without a hitch, deactivate the conditions that require an obligatory filling in of some ticket fields. Follow this guide:
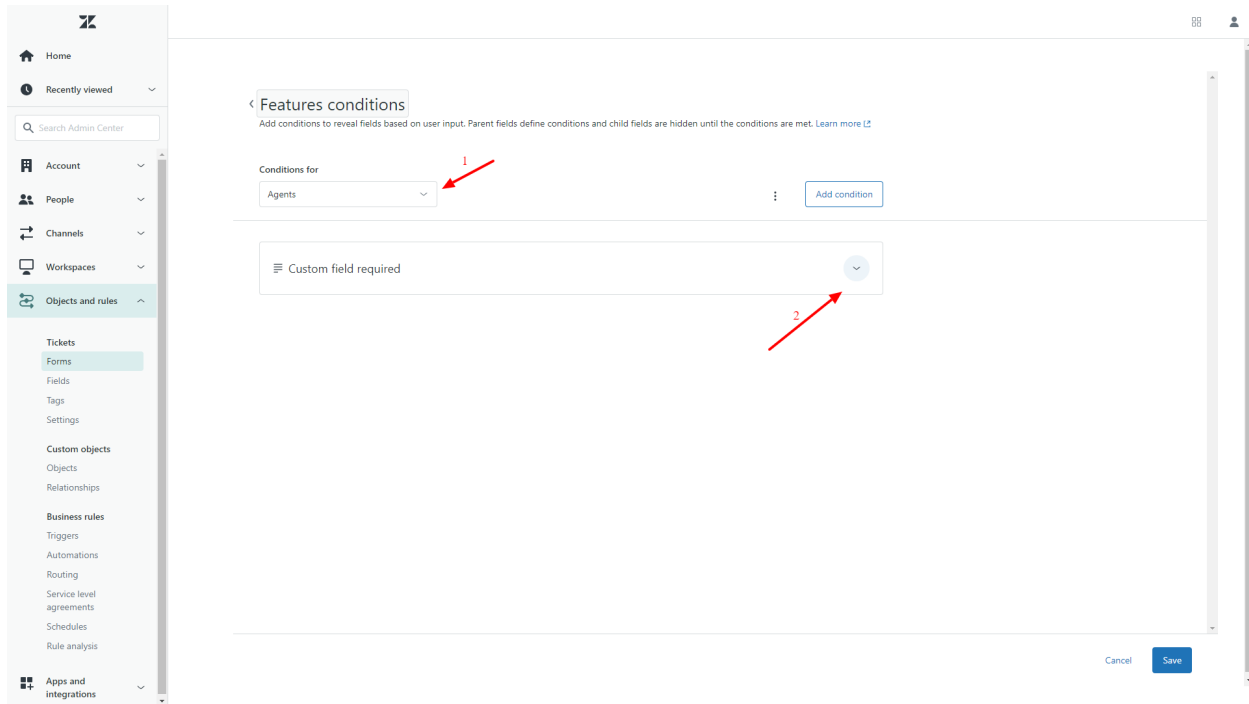
1. Go to **Admin Center**, there press on the **Objects and rules** icon.

2. Then choose **Tickets > Forms**. Go to the ticket form and press on the option menu on the right side.
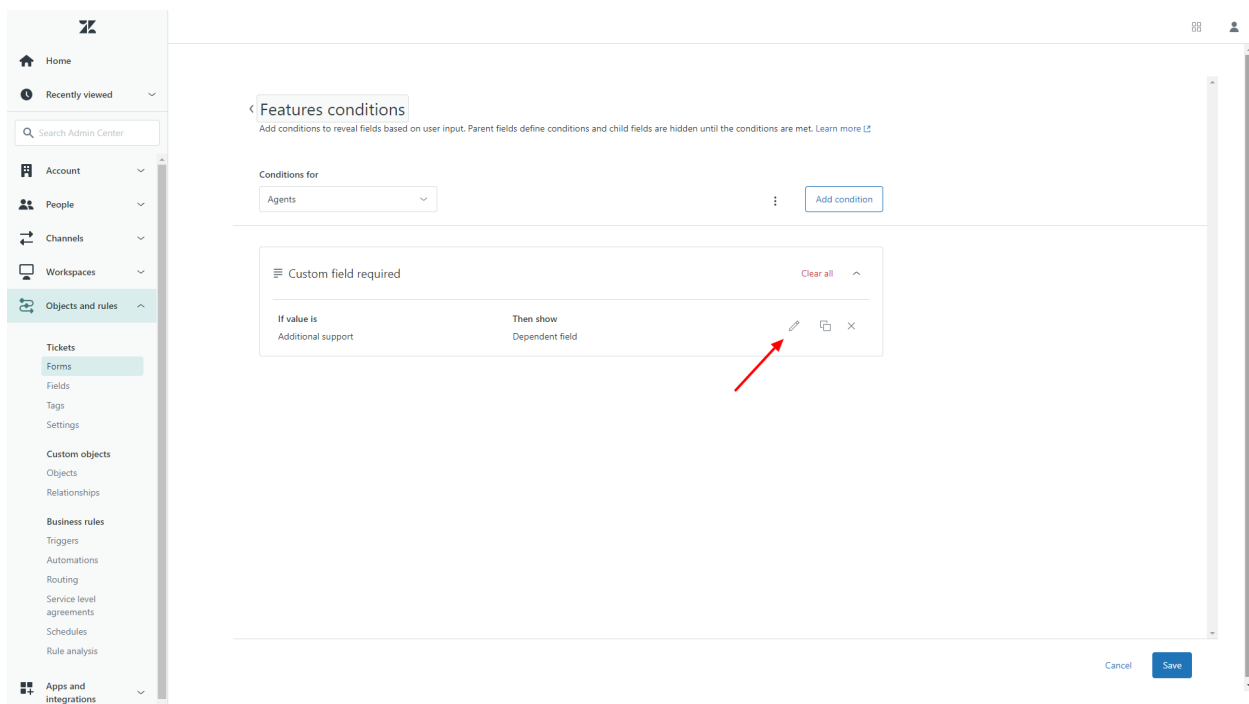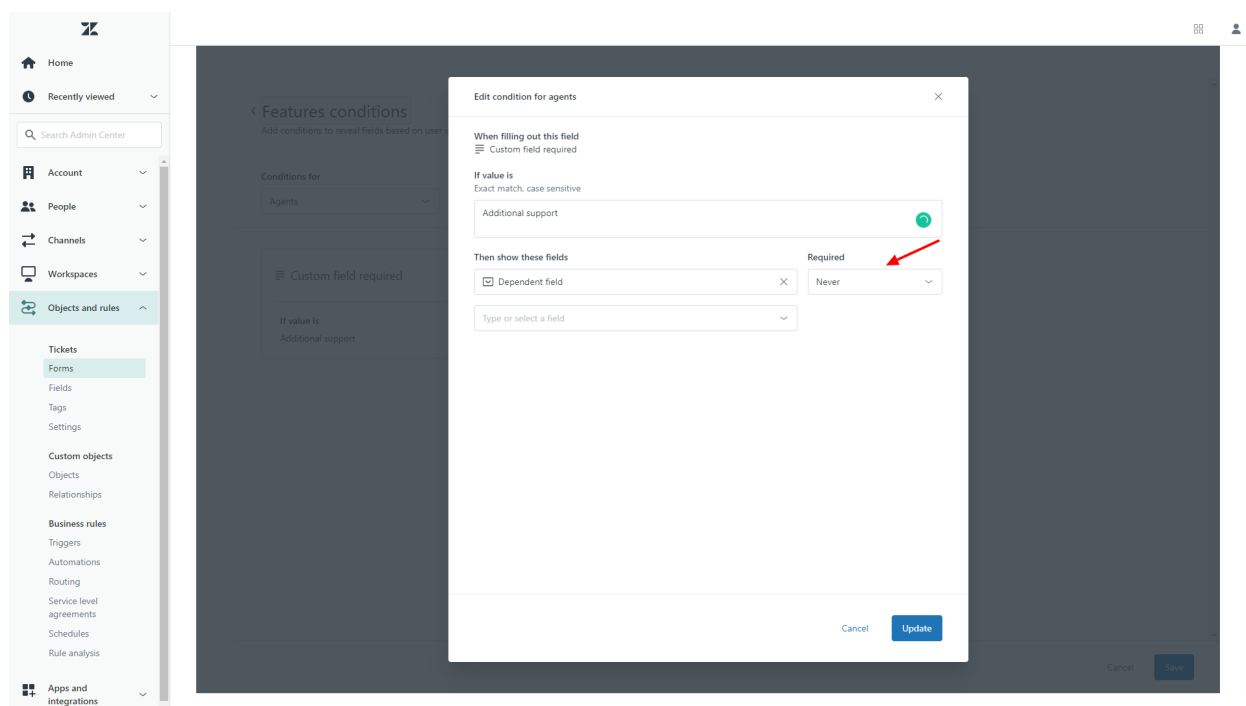
3. Select **Conditions**.

4. Pick up a type of user (**Agents** or **End users**) from the Conditions for drop-down list. Expand icon to view all the available conditions.

5. Use **pencil** to start editing a condition.

6. Open a drop-down menu in the **Required** field.

7. Pick up **Never** for each field and click on **Update** to save changes.

As soon as your Full Migration is complete, go to ticket forms to switch on the requirement settings in conditions.

3. FIND ACCESS CREDENTIALS

When setting up a Demo Migration, you need access credentials to the source platform and Zendesk.

To connect Zendesk with our tool, you need:

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

2. **OAuth authentication**: Log in to your Zendesk account.

4. RUN A DEMO

Instead of jumping right into Full Data Migration, we offer a [Free Demo Migration](#). During this process, the [Wizard](#) transfers 20 random tickets and articles to Zendesk. Also, double-check your account has admin privileges in the source platform and Zendesk to run the Demo.

1. Sign in to your Migration Wizard or create an account.

2. Connect your source and target solutions.

3. Choose the data you want to import.

4. Match [agents and groups](#).

5. Map tickets and articles route.

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

7. Initiate your Free Demo Migration.

AFTER THE DEMO MIGRATION

1. CHECK THE RESULT IN ZENDESK

Demo migration is the exact copy of Full Data Migration but on a smaller scale. Check if all tickets migrated accordingly. Note that the data imported during a Demo migration won't transfer during the Full Data Migration.

Once your Demo Migration is done, check a table with four columns of records:

● all available records

● migrated records

● failed records

● skipped records

Download reports on migrated, failed, and skipped records.

What to look at while you check migrated records?

● 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 field values got migrated

● The customers and companies migrated correctly

● Attachments migrated along with the labels

- The categories are appropriately assigned (in Knowledge Base migration)

- The automation rules did not update any of your demo data

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

For more details, read a detailed guide on checking the results of demo migration in Zendesk.

2. CONSIDER A CUSTOMIZED DEMO

Do you have tickets with more replies, attachments, or notes than your usual ones and want to see how they migrate to Zendesk? Choose **One time Demo with custom data** for both tickets and articles while data mapping.

Fill in up to 20 IDs first for tickets, then for articles. Be sure not to overrun the offered number of record IDs. However, note that it's one time option. So, if you want to run a custom Demo Migration more than one, send a request to our team.

DURING THE FULL DATA MIGRATION PROCESS

1. KEEP IN MIND THE BASICS

Run the Full Data Migration and you can work on your source help desk during the transfer. However, the records created or updated after the Full Data Migration will not appear in Zendesk automatically. Opt for Delta migration to transfer all new and updated data.

> The Migration Wizard runs the process in the cloud. You don't have to keep the tab open during the process. You can:
> - check the progress on your Full Data Migration page for you see the workflow
> - wait for a message from our team

The duration of your Full data migration depends on the number of records you're transferring. Usually, data import to Zendesk moves at about 2000 tickets per hour. To speed up the process, you can request your source vendor and Zendesk to enlarge the number of API request. Also, be sure to inform us about this change before starting your Full Data Migration.

2. DON'T MAKE ANY LAST-MINUTE CHANGES

Any alteration can suspend your migration and take more time to migrate your data. If you spotted duplicated or unnecessary records on the source help desk, let them go through. Do a little clean-up on Zendesk after the data migration.

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

Note: a Delta migration is only available for users who have chosen [a Signature support package](#).

3. START THE FULL DATA MIGRATION

The Migration Wizard transfers each record one by one. Depending on the number of entities you have, the process may take from 20 minutes to a few days.

Note: Zendesk uses the UTC timezone during the migration, so you're likely to have at least a one-hour migration difference.

The migration begins if:
1. **Your payment is confirmed**. It may take some time; that's why make a transaction in advance or schedule data migration.
2. **You've agreed to the checklist**. Click on the corresponding checklist to open a mini-guide of the essential steps you should do before transfer. After you run through the steps, put a tick in a checkbox.

AFTER THE FULL DATA MIGRATION

1. TAKE A DETAILED LOOK

Even in the case of the smooth Full Data Migration, take your time to check everything. Set search filters for all tickets to find everything:

Go to **Admin** > under **Manage** click '**Views**' > click '**Open**' to see all tickets related to a specific category. Then a list of all needed tickets opens.

Expert tip: Type * in a search bar to see the number of tickets. Pay attention to the number of records and their quality – if they are readable and in place.

2. SET UP

Your new workspace is now up and running. First, connect the email service provider to your Zendesk instance. Enable all the notifications, and tune all the necessary settings. Then, update internal links for Knowledge Base, and forward emails to Zendesk.

If you still have some questions about the migration to Zendesk, reach out to any of our experts.

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 secure 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