ZOHO DESK

DATA MIGRATION CHECKLIST

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Migrating records between help desk solutions is not something many would call easy. That's why we've compiled a migration checklist to help you import help desk data to Zoho Desk.

**

Before diving into the migration checklist, pay attention that Migration Wizard can't transfer such records to Zoho Desk:

- CC users

- Groups

- Inline images

- 'Created at' date in tickets - Instead, it will show the day and time of the end of the migration.

- Knowledge Base attachments

- Comment Author (Contact or Agent) - We leave a note with a commenter's name during the migration.

If you still consider migrating the listed records, <u>drop a line to our migration experts</u>.

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

BEFORE YOU SET UP THE MIGRATION

Note: In the Demo Migration or Full Data Migration, all customer service data migrate similarly. If some customer data did not migrate or/and transferred incorrectly during Free Demo, the same migration errors would also happen during Full Migration.

Once Demo Migration is complete, carefully check every report for migrated/failed/skipped records to know if everything migrated correctly. If any issues appear, write to our support team.

1. CHOOSE A DATE FOR MIGRATION

While picking up a date for Zoho Desk import, give your team enough time to prepare for the migration.

2. SPEAK TO YOUR TEAM

Tell your agents about data migration to Zoho Desk. Delegate certain responsibilities if needed.

3. PREPARE ZOHO DESK FOR THE MIGRATION

1. **Create corresponding custom fields**

Your custom fields on Zoho Desk should correspond to your source ones to locate your data after migration.

To create custom fields on Zoho Desk:

Go to **Setup** → under Customization, choose **Layouts and Fields** → **Fields list** → **Create or Edit Fields**→ choose a department → select the layout → move a field to the module section → press on a **Gear** icon → **mark as required** → set permissions → **Save**.

2. **Add agents**

Before migration, create agents on Zoho Desk with the same emails as your current help desk. Then you have two options:

1) Add missing agents in Migration Wizard while matching agents. Create all of them at once or specific ones.

2) Create agents in Zoho Desk.

Go to **Setup** → click **Agents** in the **Users and Control** category → press **New Agent** → fill in the details → **Add New Agent**.

> **Note**: all agents will receive an email notification where they need to accept the invitation.

3. **Create Teams**

Migration Wizard can't transfer your Teams when migrating to Zoho Desk. However, we can add the Agents to relevant Teams during the data migration process.

To create Teams, go to **Setup** → select **Teams** in the **Users and Control** category → **New Team** → fill in the Name and Description → click **Save**.

> **Note**: Turn on the Team Assignment setting after creating the required teams.

4. CONSIDER ZOHO DESK PECULIARITIES

Before the Full Data Migration to Zoho Desk, you should know that:

- There are different roles of users in Zoho Desk - *Agent*, *Light Agent* (cannot reply or comment publicly on tickets), and *Support Administrator* (an agent who can manage and customize the help desk). Pay attention to the roles you give to your users to prevent any mishaps.

- Migration Wizard can't migrate '*Created at*' dates to Zoho Desk by default. However, with a customization, you can get them migrated in the body of the comment with the author's comments.

- Migration Wizard can't transfer cases of deactivated agents.

- You can't sort the tickets by date.

- CC users do not migrate. Using customization option, you can still migrate emails of CC users into a custom field.

5. CONSIDER CUSTOMIZATION FOR YOUR DATA TRANSFER

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 change and problem objects as tickets, migration of ticket events as private notes, the "Created date" of a ticket as a custom field, migration of the information related to inactive users, inline images as attachments)

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

- Migrate contact and organization custom fields

YOU'RE ALMOST READY

1. TURN OFF NOTIFICATIONS

Turn off Email Notifications, Customer Self Service Portal Invitation, and other triggers, including validation and duplicate rules.

To switch off email notifications, go to Setup → under **Automation** find **Notify** → disable **Contact, Agent, Department**, and **Team** notifications.

To [disable Customer Self Service Portal Invitation](#), open **Setup** → under **Channels**, select **Help Center** → **Access Settings** → Under **Permissions**, disable the invitation.

2. FIND ACCESS CREDENTIALS

When running a Demo Migration, you need access credentials to the source platform and Zoho Desk. To connect Zoho Desk with Migration Wizard, you need **OAuth authentication**: Log in to your Zoho Desk account.

3. RUN A DEMO MIGRATION

Set up the Free Demo to see how Migration Wizard moves your customer support data. Transfer 20 random tickets from your current help desk tool to Zoho Desk. The flow is simple:

1. Log 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 groups](#).

5. Map tickets and articles route.

6. Select the needed [automated options](#).

7. Run your Free Demo Migration.

AFTER THE DEMO MIGRATION

CHECK THE RESULTS IN ZOHO DESK

The first thing you need to do after your Demo Migration is to check results by downloading reports on migrated, failed, and skipped records.

While looking through the migrated records, consider the following:

-   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

- 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 check if they were transferred correctly.

For more information, [read the detailed guide](#) on how to check the Demo Migration results in Zoho Desk. If you got any skipped records, contact our support reps.

BEFORE FULL DATA MIGRATION

1. CHOOSE YOUR MIGRATION WAY

During the **Full Data Migration**, you can use either source or target help desk platform. If you decide to work on your current help desk during the migration, acknowledge the fact that updated and new records won't be migrated. To import these records, run the [Delta Migration](#). This option is available in [Signature support plan](#).

As your **Full Data Migration** runs in cloud, you can check its progress any time you need or wait for our migration experts to contact you.

2. START FULL DATA MIGRATION

Full Data Migration starts after **your payment has been confirmed**. Pay in advance if you have a definitive time in mind. Or schedule the transfer to run it automatedly based on that timing. **You've agreed to the provided checklist**. Go through each point, and check the corresponding box.

AFTER THE IMPORT IS DONE

1. EXAMINE EVERYTHING

After the **Full Data Migration**, audit if everything migrated correctly. You have five days to check the results until your migration gets archived.

If you can't find any records check if you've set up the correct filters for all tickets. If the problem remains, [drop a line](#) to our support team.

2. SET UP A NEW PLATFORM

- Redirect all your incoming support channels to Zoho Desk

- Enable the notifications you previously had to turn off

- Manually 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