

# Complete help desk data migration, in **six proven phases.**

Move every record and every relationship — then prove it actually worked. A strategic playbook for teams who can't trade completeness for convenience.



# Most migration advice optimises for speed. Speed isn't the risk — **incompleteness is.**

**80%**

of migration projects run over time or exceed their budgets. — Oracle

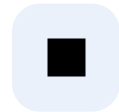
**83%**

of projects fail to meet their initial objectives. — USC Data

A migration touches daily operations **and** long-term compliance. Treat it as a strategic project from day one — not a one-click export.



# "Complete" has four dimensions. Miss one, and your migration is incomplete.



## Record

Every ticket, contact, org, agent and KB article — every status, every language.



## Relationship

Company → contact → ticket arrives intact — not three orphaned records.



## Content

Attachments, inline images — full context from day one.



## Compliance

Original timestamps and system logs preserved — a verifiable audit trail.

**A 100% progress bar means nothing if your data is broken. Relationships break silently.**



# Six phases, in a fixed order. Early steps build the foundation; later steps do the heavy lifting.

01

## Audit your source

Inventory, clean, map retention rules.

02

## Configure target

Disable automations, create fields, match agents.

03

## Select everything

Every record, every relationship, every language.

04

## Run a demo

Validate a sample before full volume.

05

## Full migration

Run it; capture changes with a delta.

06

## Validate & prove

Reconcile against your baseline.



# 01

## Audit your source first

Migration moves your data as-is. A messy source becomes a messy target — so discovery isn't optional.

Discovery is 5–10% of budget and prevents **50%+** of common failures.

- **Clean before you move.** Merge duplicate contacts, standardise overlapping tags, and remove orphaned automations and empty fields.
- **Map compliance retention.** HIPAA (6 yrs), SOX (7 yrs), PCI DSS, GDPR — decide what travels and what gets purged before the transfer.



# 02

## Configure the target

Data can't exist in a vacuum. Every ticket needs an owner, a valid status and matching fields.

- **Disable automations & triggers.** Left active, they email customers about tickets closed years ago and breach SLA timers, corrupting your reporting.
- **Create every custom field within the Migration Wizard.** Fields that don't exist in the target drop data silently — no error, no warning. Map them in the wizard.
- **Match agents by identical email.** Unmatched agents leave tickets with no owner. Map former staff to a default user or shared inbox.



# 03

## Select everything

For a complete migration, check every box on the object-selection screen. Here's what each one protects.

- **All tickets.** Closed tickets are your historical conversations, search corpus and audit evidence — don't filter without a documented reason.
- **Choose all records.** Keep the chain intact: company → contact → ticket. A contact list without relationships is just an address book.
- **KB articles, all languages at once.** One run, with cross-link updates enabled so internal URLs rewrite to the target automatically.
- **Attachments & inline images re-hosted.** Migrate them as files, or source URLs break the moment you decommission the old platform.



# 04

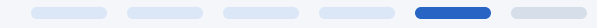
## Run a demo first

The Demo Migration is mandatory, not a formality. It moves ~20 tickets and articles with their related records so you can validate behaviour before full volume.

Demo runs are **free and unlimited** . Never proceed on broken data.

### SPOT-CHECK THE SAMPLE

- **Conversation order** — exact chronology, no thread gaps.
- **Field values & attachments** — mapped to the right attributes; files open undamaged.
- **Internal notes** — private comments stay hidden from customers.
- **Contacts** — tickets link to the right customer and company profiles.



# 05

## Run the full migration

Keep your team in the legacy system until validation is done. Before you start, confirm all five.

Then a **Delta Migration** captures anything that changed during cutover.

- 01 Custom fields exist in the target platform
- 02 Every agent maps to an account or default user
- 03 Automations, triggers & notifications are disabled
- 04 The Demo Migration passed every validation check
- 05 A complete source backup is downloaded



# 06

## Validate & prove it

A 100% progress bar means nothing if your data is broken. Validation confirms every record landed in the right place.

- **Check out a Data Reconciliation report.** Tickets, contacts, companies, and KB articles per language — investigate every discrepancy.
- **Validate the knowledge base.** Folder structure recreated, internal links working, images rendering, drafts staying drafts.
- **Only then switch off legacy.** Keep the old system live until every record is verified — then cut over with confidence.



# One thing to know: data tools move your data — **not your settings.**

Workflows, SLA policies and routing logic stay behind. Rebuild them in the new platform **before** you migrate, so the system behaves correctly when your records arrive.

## Rebuild first

Recreate triggers, automations and SLA targets in the target platform up front. Up to 40% of old rules are usually obsolete anyway.

## New IDs, same threads

Each platform issues fresh ticket IDs, but subjects, timestamps and conversation threads are preserved. A report maps old IDs to new.

## When to get help

Consolidations, complex field dependencies and formal audit trails are where Professional Services and implementation partners step in.



# See your fields in action before you commit a record.

Start a free Demo migration to watch the wizard map your actual tickets and articles. Have a complex setup? Talk to our team about Professional Services.

[Start your free Demo migration →](#)

[Talk to our team](#)