



● FREE CHECKLIST · FRESHDESK MIGRATION

Freshdesk Migration Checklist

A step-by-step guide for planning, running, and verifying your move to Freshdesk— from first prep to post-migration sign-off.

[Start Free Demo](#) →

No credit card required

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Type II certified

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60,000+

migrations
completed

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supported
platforms

Freshdesk Migration Checklist

For a seamless Freshdesk data migration, two things are crucial:

1

A step-by-step checklist

Walks you through every stage, from planning right through to post-migration verification.

2

A secure, purpose-built tool

Help Desk Migration Wizard automates and runs the transfer from start to finish.

80%

of data migration projects exceed budget or miss their deadline. Migration success starts long before the transfer itself — use this checklist to keep yours out of that statistic.

Ready to see your data in Freshdesk?

Run a Free Demo migration before you commit to anything.

[Start Free Demo](#)



Five stages, start to finish

01

Before setting up the migration

Build your strategy, prepare your team, and configure Freshdesk.

Stage 1

02

Set up the Migration Wizard

Connect your source and Freshdesk, choose records, and map fields.

Stage 2

03

Run the Free Demo Migration

Test the outcome before committing to a Full Migration.

Stage 3

04

Run the Full Data Migration

Launch, monitor, and manage your Delta Migration.

Stage 4

05

After the Full Migration

Verify your data and roll Freshdesk out to your team.

Stage 5



Before Setting Up the Migration

Before you start with the Migration Wizard, lock in your strategy, brief your team, and configure Freshdesk to receive your data. Preparation determines whether your migration finishes on time.

1.1 Build your migration strategy

- ☐ Select the migration window that creates the least disruption for your team and customers.
- ☐ Share the migration schedule with everyone who depends on the help desk.
- ☐ Decide whether you'll keep using your source platform during the transfer, or freeze it.
- ☐ Configure Freshdesk with the fields, macros, and settings you'll need in advance.

1.2 Prepare your team

- ☐ Share the migration timeline with all agents.
- ☐ Tell agents exactly when to stop working in the old system.
- ☐ Give the team time to get comfortable with Freshdesk before go-live.
- ☐ Notify leadership of migration status ahead of the Full Data Migration.
- ☐ Send a reminder the day before migration so no one logs a ticket in the old help desk by mistake.



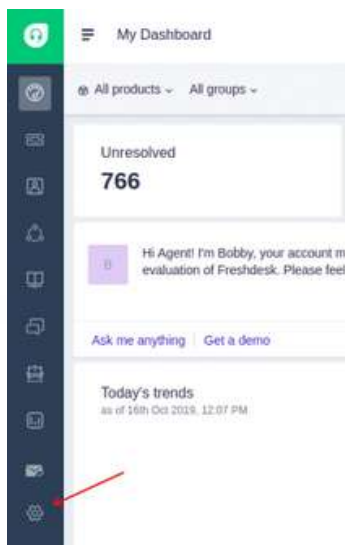
1.3 Prepare your Freshdesk platform

Before migrating data, confirm your account is configured so fields, agents, and articles transfer without errors.

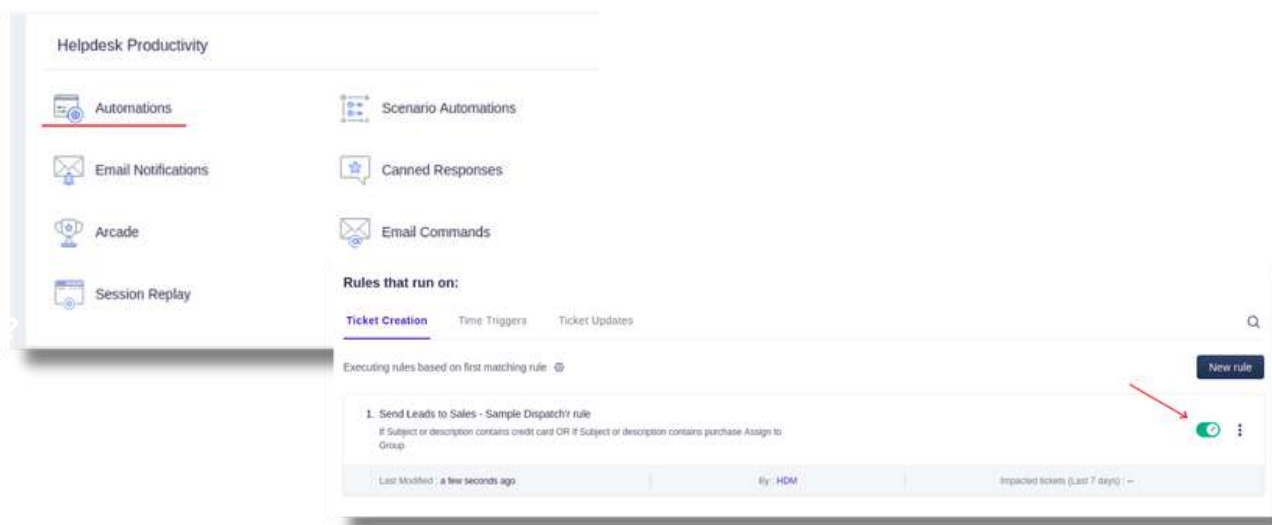
- 1 **Turn off all automations in Freshdesk.** Active automations can fire on records as they're created during migration, which corrupts your data. Re-enable them only after the Full Migration is verified. [See a full guide.](#)

Here's a guide a guide how to disable Freshdesk automations:

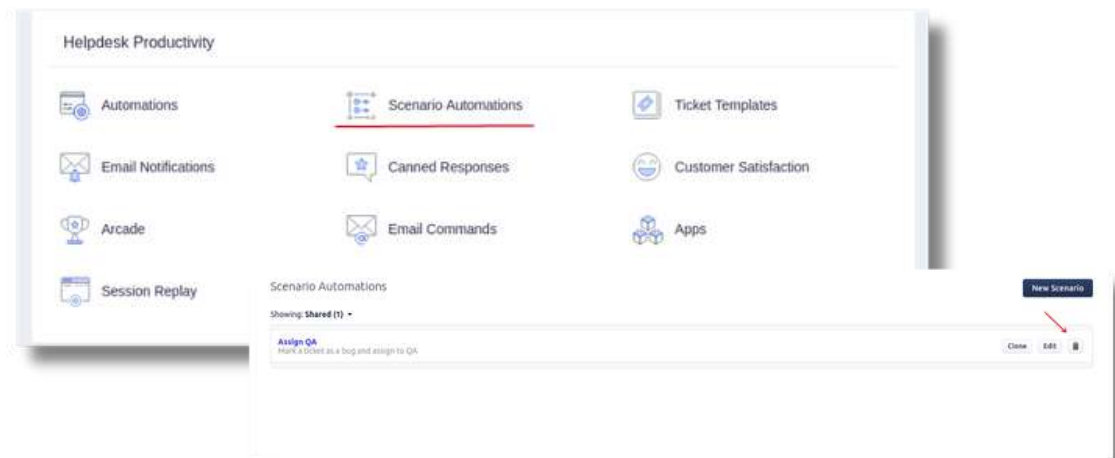
1. Log in to Freshdesk and navigate to the Admin panel.



2. Go to Automations and disable all active automation rules by clicking the green slider button.

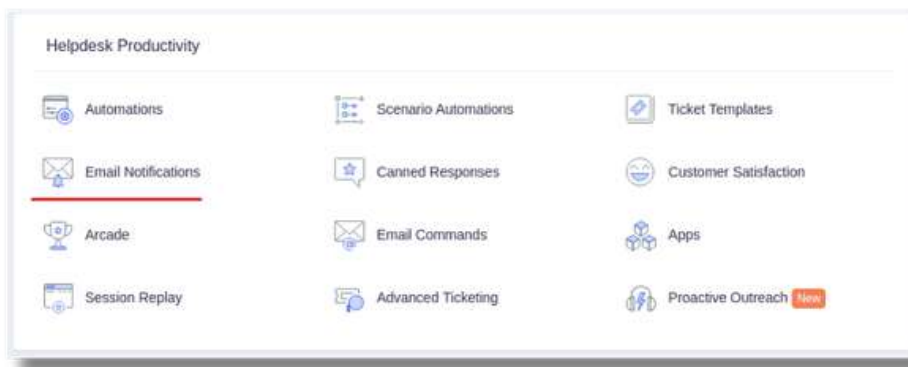


3. Similarly, go to Scenario Automations. Document all scenarios and delete them afterward.

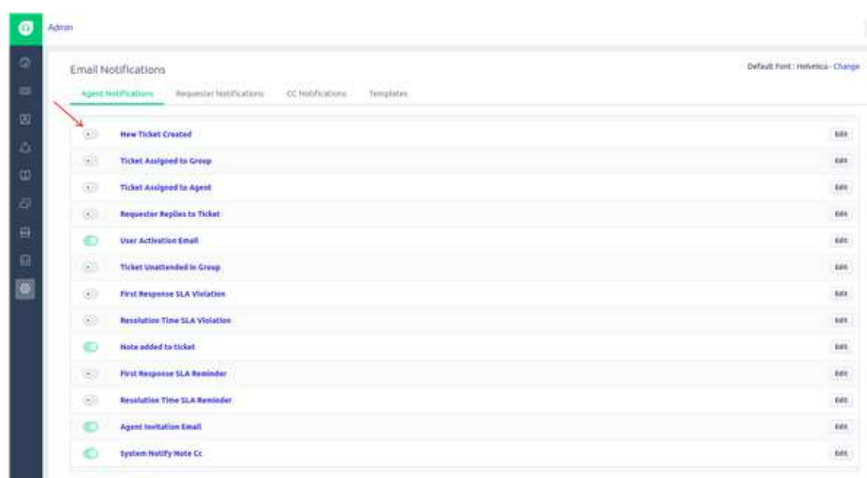


Note You can keep the scenarios active, but remember that even if you disable Agent Notifications, Freshdesk might still send updates during the migration.

4. Lastly, in the Email Notifications tab, disable Agent and Requester Notifications by clicking on the green slider buttons next to each notification.



Disable all notifications by following the same steps as you did for Automation rules. Click on the green slider button next to each notification, and if it turns grey, it's disabled.



Now, go to the Requester Notifications section and do the exact same actions.



- 2 **Set up every custom field you plan to migrate.** Freshdesk needs matching fields before the Migration Wizard can map data into them.

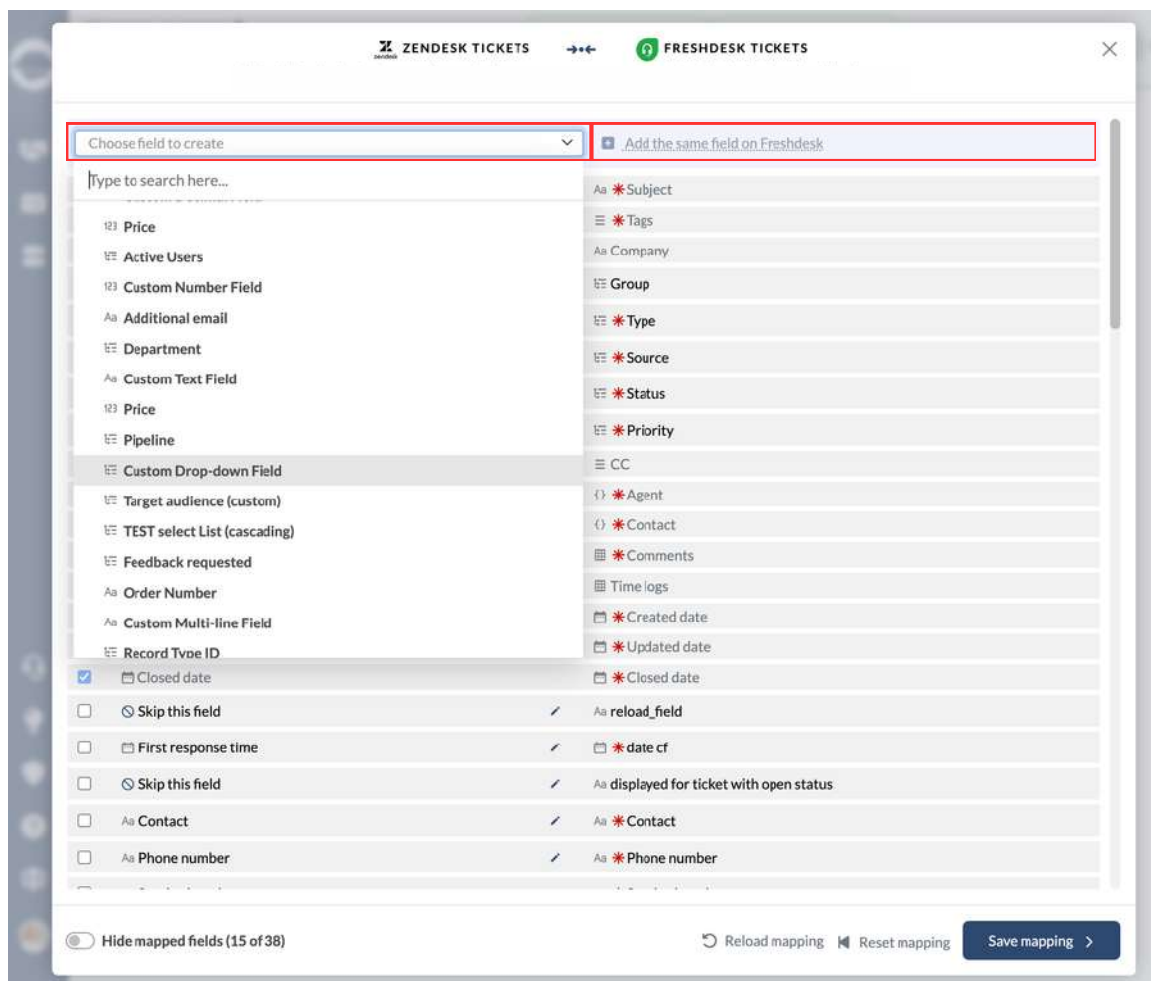
? How do I create custom fields in Freshdesk?

OPTION 1 – MANUALLY IN FRESHDESK

Go to **Admin → Workflows → Ticket Fields**, then drag a field type (text, dropdown, checkbox) onto the ticket form. Set its label, placeholder, and options, then save. Custom fields for contacts and companies live in their own Admin sections.

OPTION 2 – IN THE MIGRATION WIZARD

During field mapping, select **Add the same field in Freshdesk**. The Migration Wizard creates the field for you and maps it automatically.



? Should I disable parent-child ticketing?

Freshdesk's Parent-Child Ticketing (Pro and Enterprise plans) can cause migration errors. Every "Task"-type ticket requires the Parent-Child relation field — if it's missing, the Migration Wizard skips that ticket. To disable it:

- 1 Log in as an administrator and go to the **Admin** section.
- 2 Scroll to **Helpdesk productivity** and click **Advanced ticketing**.
- 3 Toggle off **Parent-child ticketing** in the upper right.
- 4 Confirm by clicking **Disable**.
- 5 You'll get a confirmation once the feature is off — you're clear to start.

Tip Can't disable automations? Select [Add a tag to migrated tickets](#) during mapping, then update your Freshdesk automation rules to exclude tickets carrying that tag — this keeps existing workflows from touching migrated records.

Not sure your account is ready?

Talk to a migration expert about your setup.

[Talk to an Expert](#)



Set Up the Demo Migration in the Migration Wizard

Connect your platforms, choose your records, and map your fields.

2.1 Connect your Source and Freshdesk

- 1 Go to the [Migration Wizard](#) and sign in or register if you do not have an account yet.
- 2 Once signed in, you'll land on your migration dashboard.
- 3 Set up a Free Demo Migration.
- 4 Connect your source platform and your Freshdesk account. You'll need admin-level credentials for both.

URL

Your company's Freshdesk account URL — format
`https://domain.freshdesk.com/`

API key

Profile icon → **Profile Settings** → **Your API Key**

Note API keys are temporary — run your migration before it expires, and never refresh it mid-migration, or the Demo or Full Migration in progress will break.



How do I get my Freshdesk API key?

Video tutorial — watch how to find your Freshdesk API key.

[Watch](#)

API integrations aren't available on the Free plan. On Blossom or above and can't see your key?
Email the Freshworks team to activate API access.



2.2 Choose records and set up mapping

The next step is to select the records you want to migrate. The following record types are supported for migration to Freshdesk:

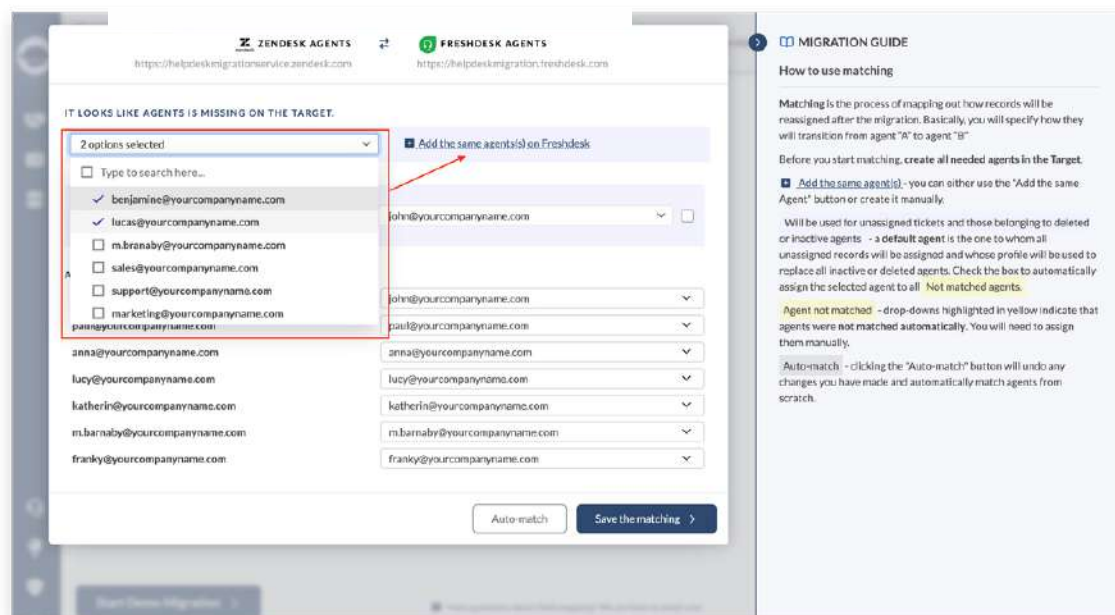
- Agents
- Companies
- Contacts
- Tickets
- Knowledge Base (categories, folders, and articles)
- Canned responses

Data transfer is built around an [API-based help desk migration approach](#), and the exact record types available depend on your source platform.

Note Available migration objects depend on the source platform.

Agents

Before the migration, create all required agents in Freshdesk and verify they are correctly mapped before starting the migration.



If an agent is inactive, deleted, or unavailable, set a **default agent** so every ticket stays properly assigned.

The screenshot displays the 'ZENDESK AGENTS' to 'FRESHDESK AGENTS' migration interface. At the top, it states 'IT LOOKS LIKE AGENTS IS MISSING ON THE TARGET.' Below this, a dropdown shows '2 options selected' and a button 'Add the same agent(s) on Freshdesk'. A red box highlights the 'CHOOSE THE DEFAULT AGENTS ON THE TARGET' section, which includes the instruction 'Will be used for unassigned tickets and those belonging to deleted or inactive agents' and a dropdown menu currently set to 'john@yourcompanyname.com' with a checkmark icon. Below this, a list of 'AGENTS AVAILABLE FOR MATCHING' is shown, with each agent name paired with a dropdown menu. The agents listed are: john@yourcompanyname.com, paul@yourcompanyname.com, anna@yourcompanyname.com, lucy@yourcompanyname.com, katherin@yourcompanyname.com, m.barnaby@yourcompanyname.com, and franky@yourcompanyname.com. At the bottom of the main panel are 'Auto-match' and 'Save the matching >' buttons. To the right, a 'MIGRATION GUIDE' sidebar contains the section 'How to use matching', explaining the matching process and providing instructions on using the 'Add the same agent(s)' button or creating agents manually. It also notes that yellow highlights indicate 'Agent not matched' and that the 'Auto-match' button resets changes.



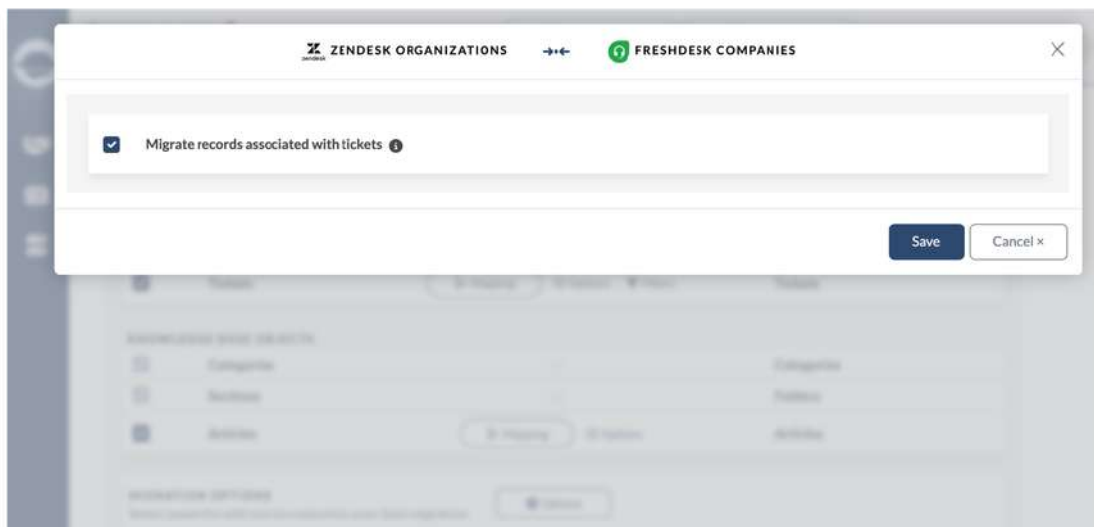
Companies

Proceed with mapping company fields.

Existing companies are matched by name, and migrated contacts are linked to them automatically.

You can also choose to **migrate only the companies associated with tickets**. This is an additional migration option that lets you skip unrelated companies and transfer only relevant data.

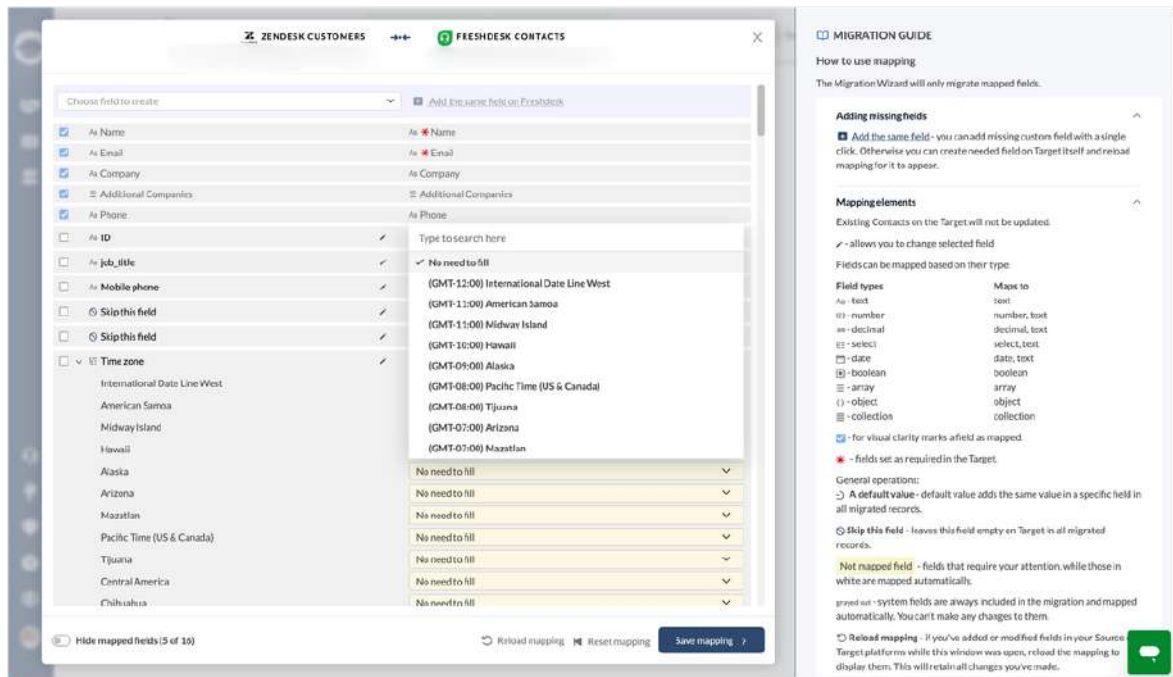
Additional options may vary by source platform. To see what applies to your migration, check the Migration Wizard or talk to a [Migration Expert](#).



Contacts

Next, choose contacts and proceed with the mapping. During contact migration, you can also select options like:

- **Migrate only contacts with associated records** — skip contacts that aren't linked to any tickets or other data.
- **Retain multi-company contact association** — migrate contacts linked to more than one company, preserving all company relationships in Freshdesk.



Tickets

Map your ticket fields, then apply filters to control exactly which tickets to migrate.

Filtering

There's an option to set filters to migrate only the data you need. Options depend on your source platform, but typically include creation or update date, groups, tags, channels, priorities, statuses, custom fields, etc.

The screenshot shows a 'Filters for Tickets' dialog box with a close button (X) in the top right corner. At the top left, there is a button labeled 'AND' and a button labeled 'Add condition'. Below these, there are several filter rows, each with a field name, a comparison operator, and a value input field. The rows are: 'Subject' with 'equals' and 'Specify value...'; 'Tags' with 'in' and 'Add a tag, then add a comma'; 'Group' with 'in' and 'Specify value...'; 'Created date' with 'greater than' and '0000-00-00 00:00:00 UTC'; 'Channel' with 'in' and 'Specify value...'; 'Status' with 'in' and 'Specify value...'; and 'Priority' with 'in' and a dropdown menu. The 'Priority' dropdown menu is open, showing options: 'Select all', 'Low', 'Normal', 'High' (which is selected with a checkmark), and 'Urgent'. At the bottom right of the dialog, there are two buttons: 'Reset filters' and 'Save filters >'. The background of the dialog is light gray, and the filter rows have a white background with a light gray border.



RECOMMENDED OUT-OF-THE-BOX OPTIONS

Migrate discussion threads (side conversations)

Moving away from Zendesk? Side conversations migrate (discussion threads in Freshdesk) as private comments, so nothing gets lost— ideal for internal collaboration, escalation threads, legal notes.

Migrate linked issues

Keep tickets connected to their external issues after the move — a Zendesk ticket linked to a Jira issue keeps that connection in Freshdesk. Available when migrating from Jira Service Management or Zendesk.

Migrate the newest records first

Transfer newest tickets first so your team picks up current issues immediately while older records migrate in the background. Use it for limited downtime windows, ongoing support during migration, tight budgets, or training on active tickets before full cutover.

ATTACHMENTS & MEDIA

Skip attachments

Control which attachments migrate: all tickets, or those last updated more than 6 / 12 / 24 months ago. Avoids storage overages and keeps large migrations focused on recent uploads.

Migrate inline images as attachments

Inline images migrate as attachments, though this can add time — set it up manually if you plan to use it. Some targets keep the original inline image and add the attachment too.

Transfer call recordings

Move call recordings from Zendesk as ticket attachments — added as .mp3 files below the description. Preserves full conversations for compliance, QA, and future reference.

Add a new tag to tickets

Provide at least one tag to activate. Use it to prevent duplicate replies during live migrations, track ticket origin when merging accounts, or filter migrated data for clean reporting.

Available for 40+ source platforms including Freshdesk, Freshservice, Zendesk, Jira Service Management, HubSpot Service Hub, Salesforce Service Cloud, Intercom, Help Scout, and Dynamics 365 — see the full list at help-desk-migration.com/supported-platforms.



Knowledge Base



Do I need to activate the Freshdesk Help Center before importing articles?

Yes. The Knowledge Base must be active before articles can import. Only the account owner can do this: go to **Guide** → **Settings** in the sidebar and click **Activate**.

OUT-OF-THE-BOX OPTIONS FOR KNOWLEDGE BASE MIGRATION

Update cross-links between articles

The Migration Wizard automatically updates the domain and article IDs to match your target, so articles stay connected — and cross-links stay intact between translated articles for multilingual bases.

Select records for the Demo

Available separately for articles under Options. Enter up to 20 article IDs and your chosen records migrate with all related data — great for checking formatting on complex articles before the Full Migration.

Migrate content translations

Migrate articles in multiple languages, provided both platforms support multilingual features and matching versions exist on each side. Works only when every translation of an article shares the same article ID.



Run the Free Demo Migration

Test the outcome before committing to a Full Migration.

Start Free Demo Migration

See your data in Freshdesk in minutes — no credit card required.

[Start Free Demo →](#)

The Free Demo Migration moves **20 tickets and 20 KB articles**, plus associated contacts and companies, from your current help desk to Freshdesk — so you can check mapping and data integrity before you pay for anything.

- Run the Demo as many times as you need to refine data mapping.
- Request additional customization if you need to migrate specific data that doesn't migrate by default..
- Demo migrations are archived after 30 days of inactivity — update your migration at least one in two weeks to keep it active.



What is a Rollback Demo, and how does it work?

Rollback Demo removes migrated entities from the target after a Demo completes. It's available only on platforms that support it, and some records are preserved to avoid future misalignment.

- 1 Find the **Rollback Demo** option after your Demo finishes, under the details on migrated entities.
- 2 Click **Rollback Demo** to open a list of entities marked for deletion.
- 3 Click **Continue** to proceed.
- 4 Once the rollback completes, those records no longer exist on your target platform.



? How do I verify the Demo Migration results?

Review the Wizard reports and compare migrated records against your source. Check the following in Freshdesk:

- ✓ **Tickets** — content & status
- ✓ **Contacts** — info accurate
- ✓ **Companies** — relationships
- ✓ **Assignments** — correct agents
- ✓ **Custom fields** — values
- ✓ **Attachments** — accessible
- ✓ **Comments** — notes migrated
- ✓ **Tags** — present
- ✓ **Knowledge Base** — structure

Something didn't migrate correctly? Correct the issue, adjust your migration settings, and rerun the Demo — or contact the Help Desk Migration support team for help.

Something look off in your Demo?

Our support team can help you fix the mapping.

[Talk to an Expert](#)



Run the Full Data Migration

A few out-of-the-box options can make the process smoother.

What to know before starting

- ☐ **Soft-deleted contacts** — restore or permanently delete before migration
- ☐ **First comment behavior** — Freshdesk may store it as a public note
- ☐ **API limits** — request higher limits for large datasets
- ☐ **Admin permissions** — confirm access on both platforms
- ☐ **Required custom fields** — create beforehand
- ☐ **Delta Migration** — use it for records created after Full Migration begins
- ☐ **Base64 inline images** — may convert to attachments
- ☐ **Automations** — disable all active Automation Rules, Scenario Automations, and Agent/Requester Email Notifications in Freshdesk before migration.

? How do I start the Full Migration?

Complete payment, confirm your migration checklist, and launch the Full Migration from the Migration Wizard.

? How do I monitor progress?

Track progress from the Migration Wizard dashboard. You'll get a notification the moment the migration finishes.

? Can I keep working during the migration?

Yes. Keep working in your source system if you plan to run a Delta Migration afterward.

? What is a Delta Migration?

It transfers newly created and updated tickets after your initial Full Migration — with no risk of duplicates. Available on Signature and Enterprise Support Packages.

Ready to launch your Full Migration?

Pick up right where your Demo left off.

[Start Full Migration](#)

After the Full Migration

Verify your data, then bring your team on board.

How do I verify that everything migrated correctly?

Review the migrated data and confirm everything transferred. Check each of these in Freshdesk:



Tickets — count & content match source



Contacts — records complete



Companies — associations correct



Attachments — open a sample to confirm



Tags — ticket tags present



Custom fields — values accurate



Agent permissions — correct access



Workflows — rules behave as expected



Automations — re-enable & verify

Important Once verification is complete, re-enable the automations you turned off in **Stage 1** and confirm they fire correctly on live tickets.

Roll Freshdesk out to your team



Notify your team that Freshdesk is ready for use.



Start working from your new help desk.





Migration complete. Now put Freshdesk to work.

Notify your team that Freshdesk is ready, and start working from your new help desk. Ready to move your own data?

[**Start Free Demo** →](#)

[**Talk to a Migration Expert**](#)

Start Free Demo

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