

Zendesk Data Migration Checklist

To ensure a smooth Zendesk data migration, you need two key things:

1. A clear, [step-by-step checklist](#) that covers every stage of the migration.
2. A reliable third-party service like Help Desk Migration to automate and simplify the process.



Stage 1: What should I do before setting up a Zendesk migration?

Planning is critical. Around 60% of the migration effort happens before the data transfer begins. Before you start, take these key steps:

1. How do I create a Zendesk migration strategy?

To set up a successful Zendesk migration, follow this simple plan:

- Choose the best time for migration to minimize disruption.
- Communicate the schedule clearly with your team.
- Decide if the source system will remain active during migration.
- Prepare your Zendesk target by configuring custom fields, macros, and settings.

This approach helps ensure a smooth and well-coordinated migration process.

2. How should I prepare my team for Zendesk migration?

Keep your support team informed and ready. Here's how:

- Share a clear migration timeline.
- Tell agents when to stop working in the old help desk.
- Give the team time to adjust to Zendesk.

Tip: Send a reminder one day before migration using email or a calendar alert to prevent accidental work on the old system.

3. How do I prepare Zendesk for data migration?

Before migrating data to Zendesk, set up your account to ensure all fields, agents, and articles transfer correctly. Here's what to do:

How do I create custom fields in Zendesk?

To map your records properly, create custom fields that match your source data types. Zendesk supports custom fields for **tickets**, **users**, and **organizations**.

You have two options:

Option 1: Create custom fields manually in Zendesk

- Go to **Admin** → **Manage** → select **User**, **Organization**, or **Ticket fields**.
- Click **Add field**.
- Choose the correct field **type** (text, dropdown, checkbox, etc.).

Ticket Fields
Ticket fields contain all ticket data, such as subject, description, and priority. Add and manage ticket fields to customize your ticket forms for agents and end users. [Learn more](#)

Title	Field ID	Type	Date modified
multiselect_field	360012293799	Multi-select	2020-07-17
Dependent field	360012497959	Drop-down	2020-07-24
Social Messaging Channel Info...	360013271820	Multi-line	2020-08-18
Last Time Opened	360013288479	Text	2020-08-18
Refund	360013521200	Decimal	2020-08-26
Reason	360013521220	Text	2020-08-26

Option 2: Create custom fields in the Migration Wizard

- When mapping fields, select the source field.
- Click **Add the same field in Zendesk**.
- Wait a few seconds while the field is created.
- Map the field values once it appears.

The screenshot shows the Zendesk Migration Wizard interface. On the left, a list of Freshdesk fields is shown with checkboxes for mapping. On the right, the corresponding Zendesk fields are listed. The 'Status' field is currently selected for mapping. A tooltip 'Add the same field on Zendesk' is displayed above the Zendesk 'Status' dropdown. The 'Status' dropdown shows options: New, Open, Pending, Solved, New, Pending, In Progress, and Closed. Below the dropdown are buttons for 'Reset mapping' and 'Save mapping >'. To the right of the main mapping area is a sidebar titled 'HOW TO USE MAPPING' with sections for 'Adding missing fields', 'Mapping elements', and 'Field types'. The 'Field types' section lists various field types and their mappings to Zendesk types.

Tips:

- Set fields as **Unrequired** to prevent empty values.
- Use a **default value** for each field when possible.

Should I set up macros (saved replies) in Zendesk?

Yes. Review and create any macros (also known as saved replies) you want to keep using in Zendesk. Shared macros (used by the whole team) are especially worth recreating.

To add macros in Zendesk: Go to **Admin** → **Macros** → **Add Macro**

Name	Available for	Usage (last 7 days)
1	All agents	0
10	All agents	0
11	All agents	0
12	All agents	0
13	All agents	0

What should I know about agent profiles during migration?

Migration Wizard sets up the agent profiles during the migration and uses only the slots available in your account.

If you have unassigned, inactive, or deleted agents:

- Assign a **default agent** in Zendesk when mapping agent profiles.
- This ensures all tickets are correctly associated with an agent.

Do I need to activate the help center before importing articles?

Yes. If you plan to import knowledge base articles, the help center must be active.

Only the account owner can activate it:

- Go to **Guide** → **Settings** in the sidebar.
- Click **Activate**.

4. What limitations should I know before migrating to Zendesk?

Zendesk has specific rules and system behaviors you should consider before migrating your data. Below is a list of key limitations and how to handle them:

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: 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.

5. What data isn't transferred by default to Zendesk?

Some types of data don't transfer unless you enable additional options during setup. Here's the list of records available if you choose automated options:

- [Inline images](#)
- Call recordings
- Side conversations
- [Content translations](#)
- [Links between knowledge base articles](#)

To transfer these data, make sure to activate these features during migration setup.

6. Can I customize my Zendesk data migration?

Yes. You can fully customize your Zendesk migration using both pre-built options and advanced customizations. This helps you control how your data is transferred and ensures it fits your specific business needs.

What customization options are available?

Use these pre-built features in the Migration Wizard:

- Migrate the newest records first;
- Add tags to migrated tickets;
- Migrate inline images as attachments;
- Skip attachments to speed up migration;
- Select records for Demo migration, available for tickets and articles;
- Migrate content translations;
- Transfer ticket side conversations as private notes;
- Migrate call recordings as mp3 attachments;

AUTOMATED MIGRATION OPTIONS

Want to get the most out of your data migration?

Our automated options are designed to bring extra value to your migration by refining, organizing, and enhancing your data transfer automatically.

Price

Options depend on the volume of transferred data. However, all options are available free of charge during the demo migration, so we strongly encourage you to try them out. It's the best way to see how they can improve your results before the full migration.

Simple selection

You can add or remove options at any time—either when setting up your demo migration or later at checkout before the full migration.

You don't need to worry about choosing the "right" ones—just select the ones you're curious about during the demo. Their availability depends on your specific source and target platform, so we'll show you only what applies.

MORE HELPFUL GUIDES TO CHECK

Automated Options: Customize Data Migration Easily

Note: Some options, like migrating images or translations, may take more time.

What advanced customizations can I request?

Our team can tailor your migration further:

- **Filter data** by tags, date, fields, groups, etc.
- **Change default behavior**, e.g., convert change/problem objects to tickets.
- **Enrich migrated records** with the original ticket IDs or extra tags.

[Reach out to our support reps](#) to set up a custom migration based on your needs.

Can I filter historical data before migrating to Zendesk?

Yes. Many companies choose to migrate only relevant records. You can:

- Exclude old or resolved tickets.
- Skip spam or irrelevant conversations.
- Migrate only data from a specific date range.

Use [custom filtering](#) to match your business needs. Contact our team to define what to include or exclude.

Do article dates stay the same in Zendesk?

No. When you import articles into Zendesk, the system replaces the original creation and update dates with the migration date.



MOVE TO A NEW CUSTOMER SERVICE

Benefit from a free Demo and see a test migration to a desired tool.

[Set up a Demo](#)

Stage 2: What should I do right before starting the Demo Migration to Zendesk?

Before you begin the Demo Migration, take a few quick steps to prevent errors or unwanted changes.

1. Should I turn off Zendesk automations before migration?

Yes. Disable all active automations in Zendesk to avoid triggering updates or notifications on imported tickets.

Here's how:

- Go to Admin → Business Rules → Automations.
- Hover over an automation.
- Click the three-dot menu.

- Select Deactivate.
- Repeat for all automations.

Automations

Automations take action to modify ticket properties at a specified time after a ticket is updated. For example, an automation sets tickets to Closed four days after they are solved. The order of automations is important because an automation might contain an action that activates another automation. [Learn more](#)

Q. Search automations

Active Inactive

Name	Last updated	Usage (last 7 days)
...	Oct 23, 2020	0
...	Jul 28, 2021	
...	Oct 13, 2020	
...	Oct 13, 2020	
...	Oct 13, 2020	
...	Jul 28, 2021	0
Escalate unsolved VIP tickets to Urgent.	May 7, 2021	0
...	Jul 15, 2021	0
...	Aug 18, 2021	0

⋮ AZ Add automation

Business Rules

Routing

Triggers

Automations

Service Level Agreements

Rule Analysis

Answer Bot

SETTINGS

Account

Subscription

Security

Schedules

Tickets

Agents

Customers

Benchmark Survey

Extensions

Alternative method: If you can't disable automations, select "Add a tag to migrated tickets" during data mapping in the Migration Wizard.

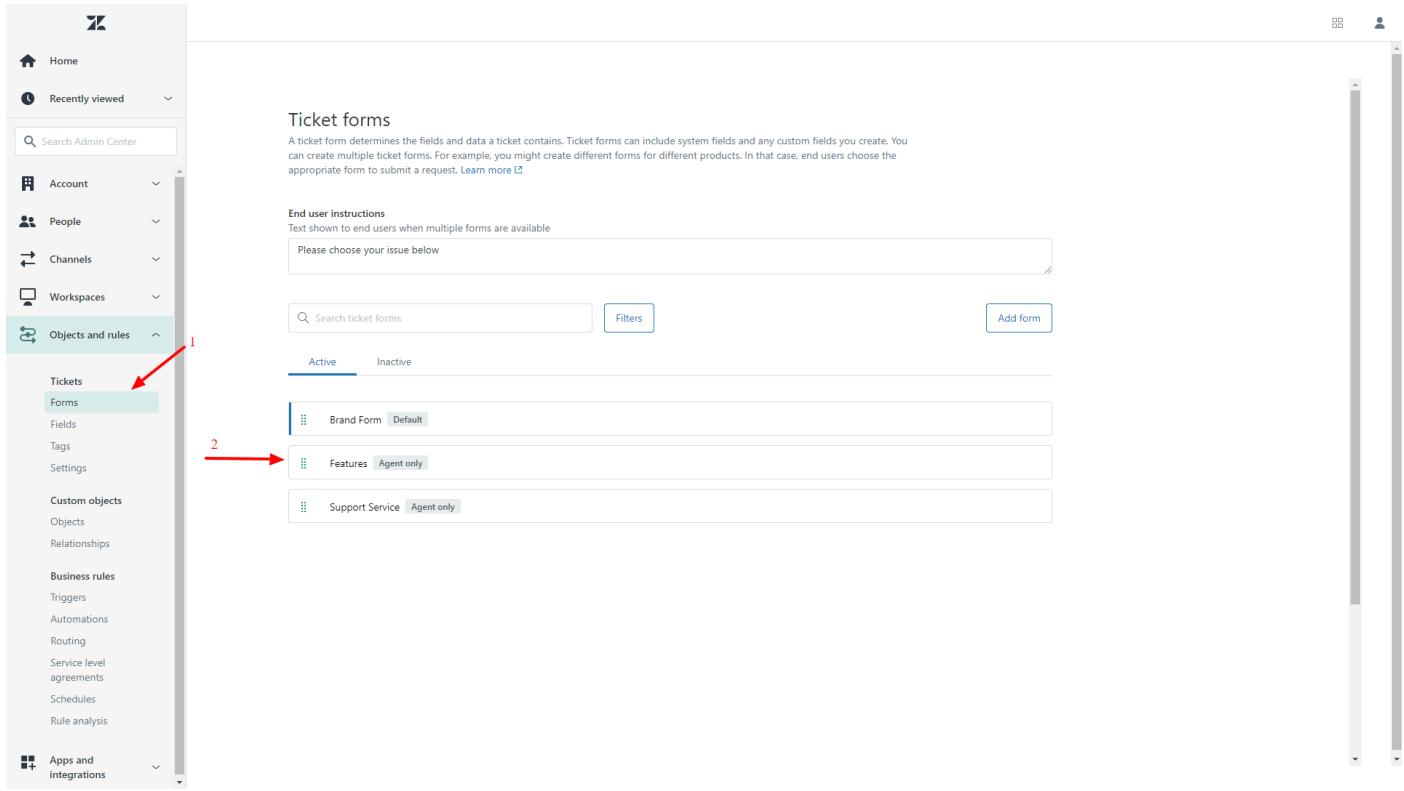
Then, in Zendesk, update your automation rules to exclude tickets with that tag. This prevents them from being affected by existing workflows.

2. How do I turn off required field conditions in Zendesk?

To prevent errors during migration, [disable all conditions](#) that make fields required in ticket forms.

Step-by-step instructions:

1. Go to the **Admin Center**.
2. Click the **Objects and rules** icon
3. Navigate to **Tickets → Forms**.



Ticket forms
A ticket form determines the fields and data a ticket contains. Ticket forms can include system fields and any custom fields you create. You can create multiple ticket forms. For example, you might create different forms for different products. In that case, end users choose the appropriate form to submit a request. [Learn more](#)

End user instructions
Text shown to end users when multiple forms are available

Please choose your issue below

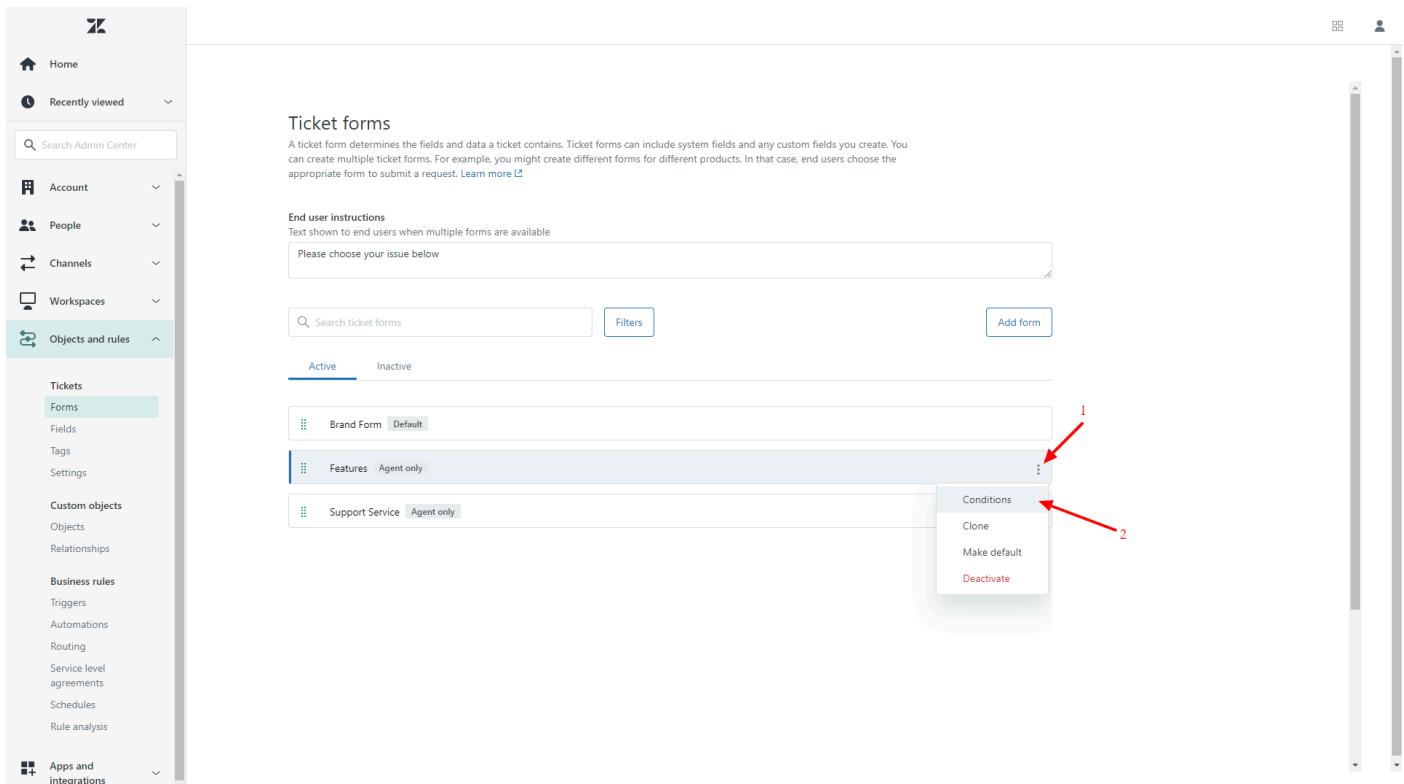
Search ticket forms Filters Add form

Active Inactive

Form	User Type
Brand Form	Default
Features	Agent only
Support Service	Agent only

4. Open the **ticket form** and click the options menu.

5. Select **Conditions**.



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Search ticket forms Filters Add form

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Form	User Type
Brand Form	Default
Features	Agent only
Support Service	Agent only

⋮

1

2

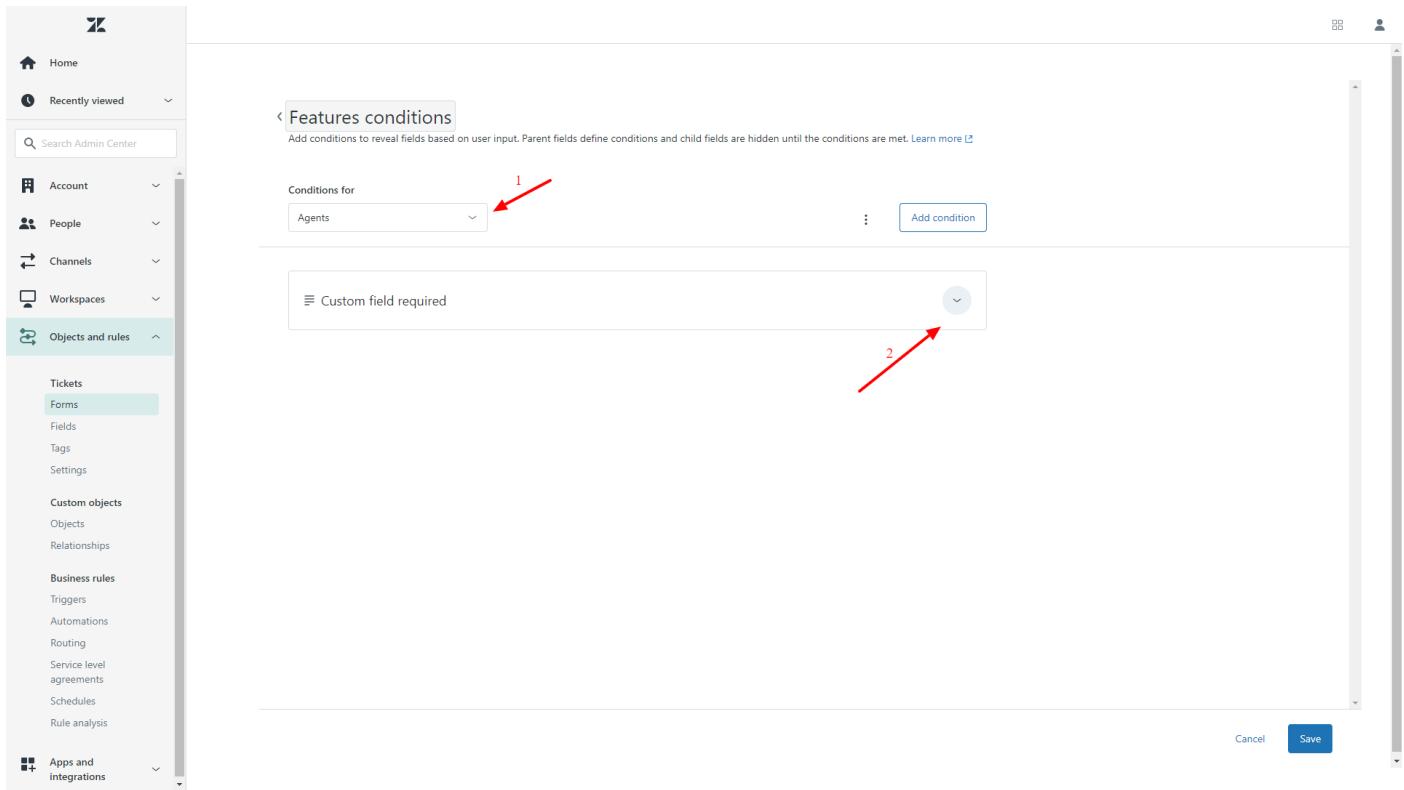
Conditions

Clone

Make default

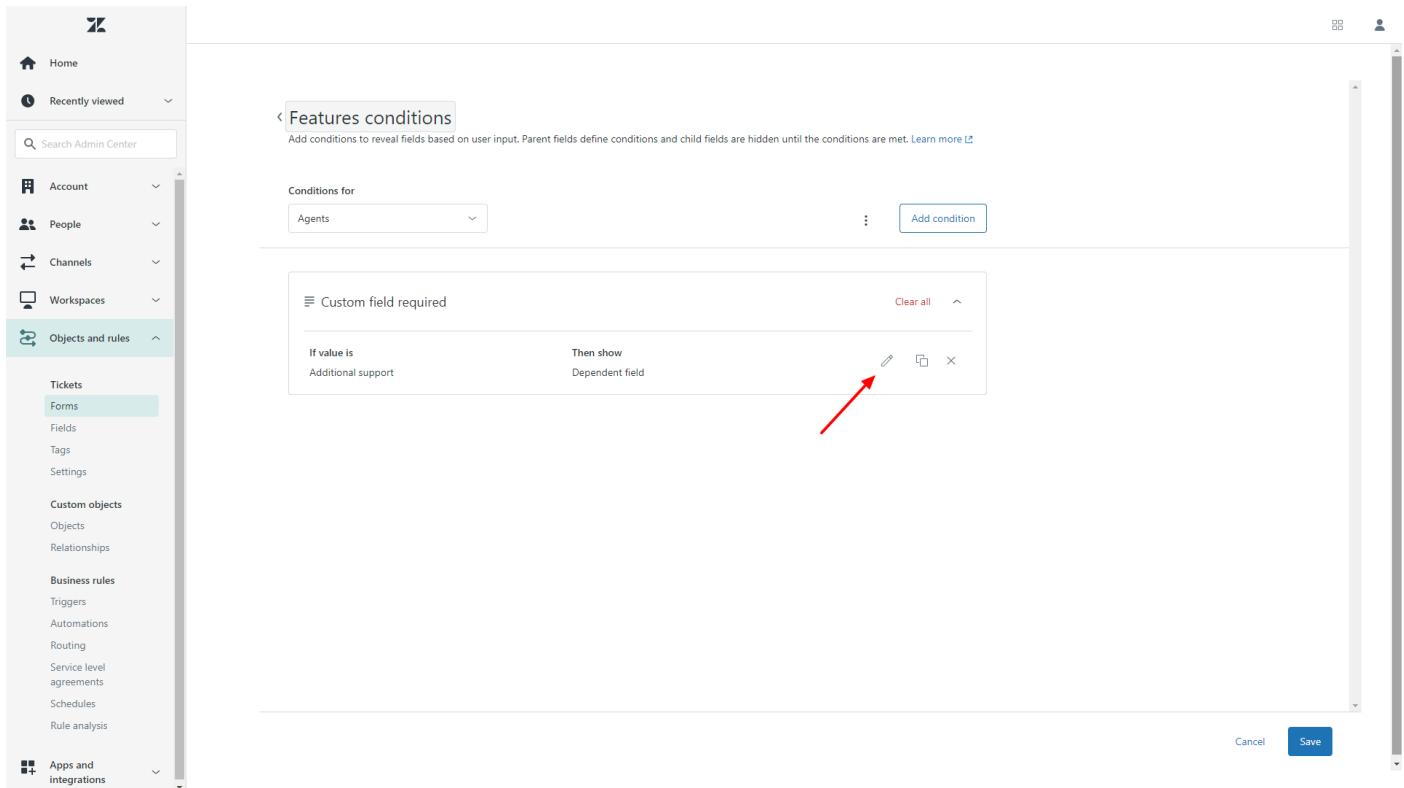
Deactivate

6. Choose the user type (**Agents** or **End users**).



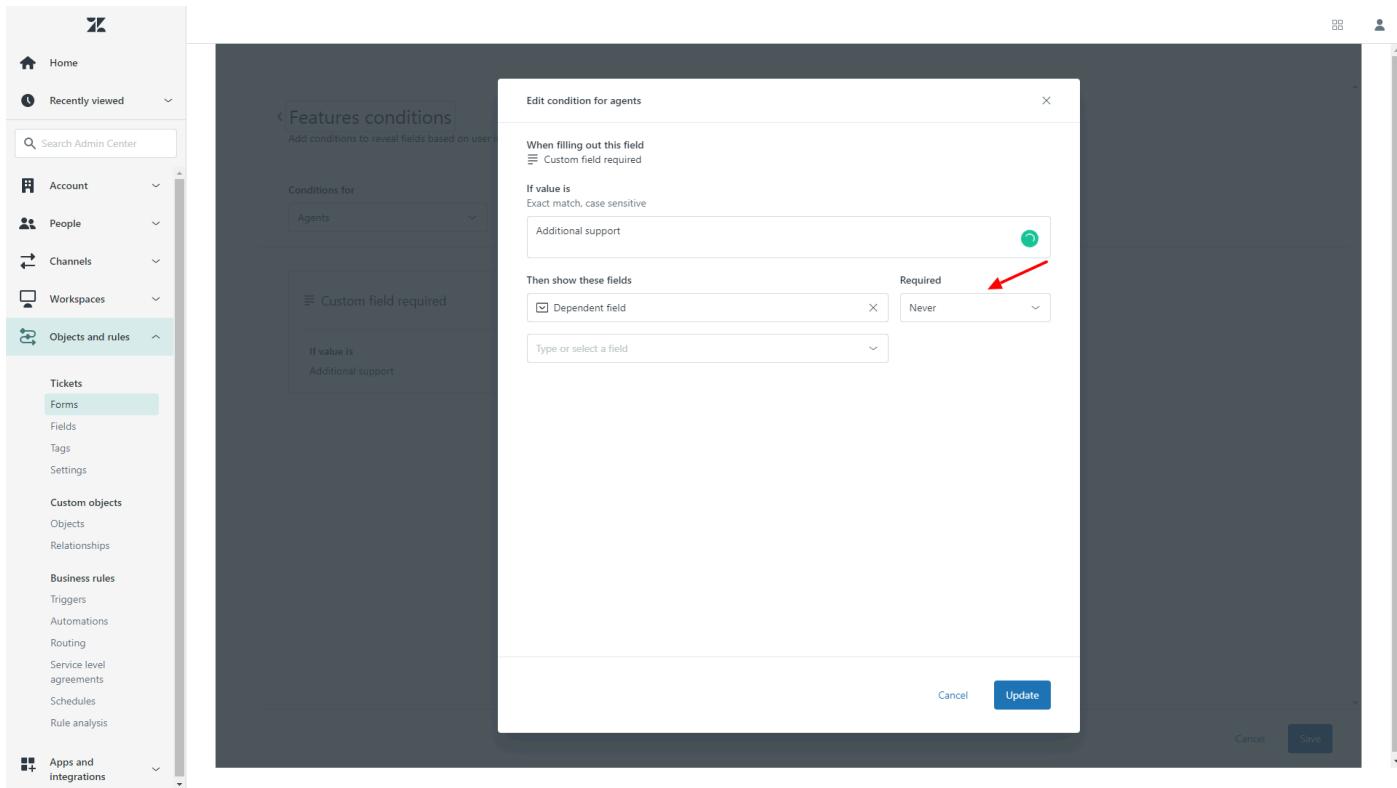
The screenshot shows the Zendesk Admin Center interface. The left sidebar is open, showing categories like Home, Recently viewed, Account, People, Channels, Workspaces, and Objects and rules (which is currently selected). Under Objects and rules, there are sub-options for Tickets, Forms, Fields, Tags, and Settings. The main content area is titled 'Features conditions' with the sub-instruction: 'Add conditions to reveal fields based on user input. Parent fields define conditions and child fields are hidden until the conditions are met. Learn more'. A dropdown menu 'Conditions for' is open, showing 'Agents' with a red arrow pointing to it. Below this is a section titled 'Custom field required' with a red arrow pointing to its header. At the bottom right of the main area are 'Cancel' and 'Save' buttons.

7. Click the pencil icon to edit each condition.



The screenshot shows the same 'Features conditions' page as the previous one, but with a condition added. The 'Conditions for' dropdown is still set to 'Agents'. A condition is listed under 'Custom field required' with the 'If value is' field containing 'Additional support' and the 'Then show' field containing 'Dependent field'. A red arrow points to the edit icon (pencil) in the 'Then show' section. The bottom right of the page still has 'Cancel' and 'Save' buttons.

8. In the "Required" dropdown, select **Never**.



9. Click **Update** to save.

After your Full Migration is complete, return to ticket forms and re-enable required conditions as needed.

3. What access credentials do I need to set up the migration?

To run a Demo Migration, you'll need credentials for both your source platform and Zendesk. For Zendesk, prepare:

- **URL** – Your Zendesk account's URL.
- **OAuth authentication** – Log in to Zendesk when prompted.

4. How do I run a Free Demo Migration to Zendesk?

To test your setup before Full Migration, run a [Free Demo Migration](#). It moves 20 random tickets and 20 help center articles to Zendesk.

To run your Free Demo Migration:

1. Sign in or create an account in the [Migration Wizard](#).
2. Connect your source platform and Zendesk.
3. Choose the data you want to import.
4. [Map fields](#) for contacts, companies, tickets, and articles.
5. Select [automated options](#) (e.g., migrate newest records first, skip attachments).
6. Start the Free Demo Migration.

Tip: Make sure both platforms have admin-level access—it's required to launch the Free Demo.

Does the Demo Migration work the same as the Full Migration?

Yes. Migration Wizard handles Demo and Full Migrations the same way.

If some ticket data is missing or incorrect in the Demo, the same issue will appear in the Full Migration.

How to check:

- Download Demo Migration reports.
- Review migrated, failed, and skipped records.
- Contact support if you spot issues before launching the Full Migration.

Stage 3: What should I check after the Demo Migration to Zendesk?

After your Free Demo Migration, review the results in Zendesk to ensure everything transferred correctly. The Demo simulates a Full Migration using a small sample—20 tickets and 20 articles—but the process is identical.

How to review your Demo Migration:

1. Go to your Migration Wizard dashboard and review the results table:

- All available records;
- Migrated records;
- Failed records;
- Skipped records;

2. Download reports for deeper insights

3. In Zendesk, verify the following:

- All comments migrated with correct authors;
- Tickets are assigned to the right agents;
- Custom field values are intact;
- Customers and organizations migrated;
- Attachments and labels are present;
- Knowledge base categories are correct;
- No automations altered demo data;

Tips:

- Manually download a few attachments in Zendesk to check their integrity.
- You can run Demo Migrations as many times as needed. If some records don't transfer properly, fix the issues and try again. This way, you can carefully adjust your data mapping and be sure everything migrates correctly before the Full Migration.

Can I run a custom Demo Migration to Zendesk?

Yes. If you want to test specific records, choose the **Select records for Demo** option separately for tickets and articles under **Options**.

- Enter up to 20 ticket IDs and 20 article IDs.
- This option is only available once per migration.
- Need more than one custom Demo? Contact our support team.



THINKING OF SWITCHING TOOLS?

Test your migration for free and see your data in action.

[Set up a Demo](#)

Stage 4: What should I know while running a Full Data Migration to Zendesk?

Once you launch your Full Data Migration, the process runs in the cloud—no need to keep your browser open. You can continue working in your source help desk, but remember:

- New or updated records added after Full Migration won't transfer automatically.
- To move those later changes, run a Delta Migration (available with the Signature support package).

Note: [Delta Migration transfers](#) new or updated records made after the full migration starts. It ensures Zendesk stays up to date without interrupting your support. Use Delta Migration to capture all changes and complete your data transfer smoothly.

What else to keep in mind:

- Track progress in the Full Migration dashboard.
- Our team will notify you when it's complete.
- Zendesk migration speed averages **2,000 tickets per hour**.
- To speed it up, ask Zendesk and your source tool to **increase API limits**, and notify us before migration starts.

Can I make changes during Full Migration?

No, avoid changes during Full Data Migration. Editing records, removing duplicates, or altering fields mid-process may pause or delay your migration. If you discover unnecessary data, let it migrate and clean it up in Zendesk afterward.

How do I start a Full Data Migration to Zendesk?

To begin your Full Data Migration, make sure:

- Payment is confirmed.
- Pre-migration checklist is approved on the right sidebar.

Once both are done, the Migration Wizard will start transferring records in the cloud—no need to keep your tab open. You can track progress on the Full Migration page or wait for a message from our team.

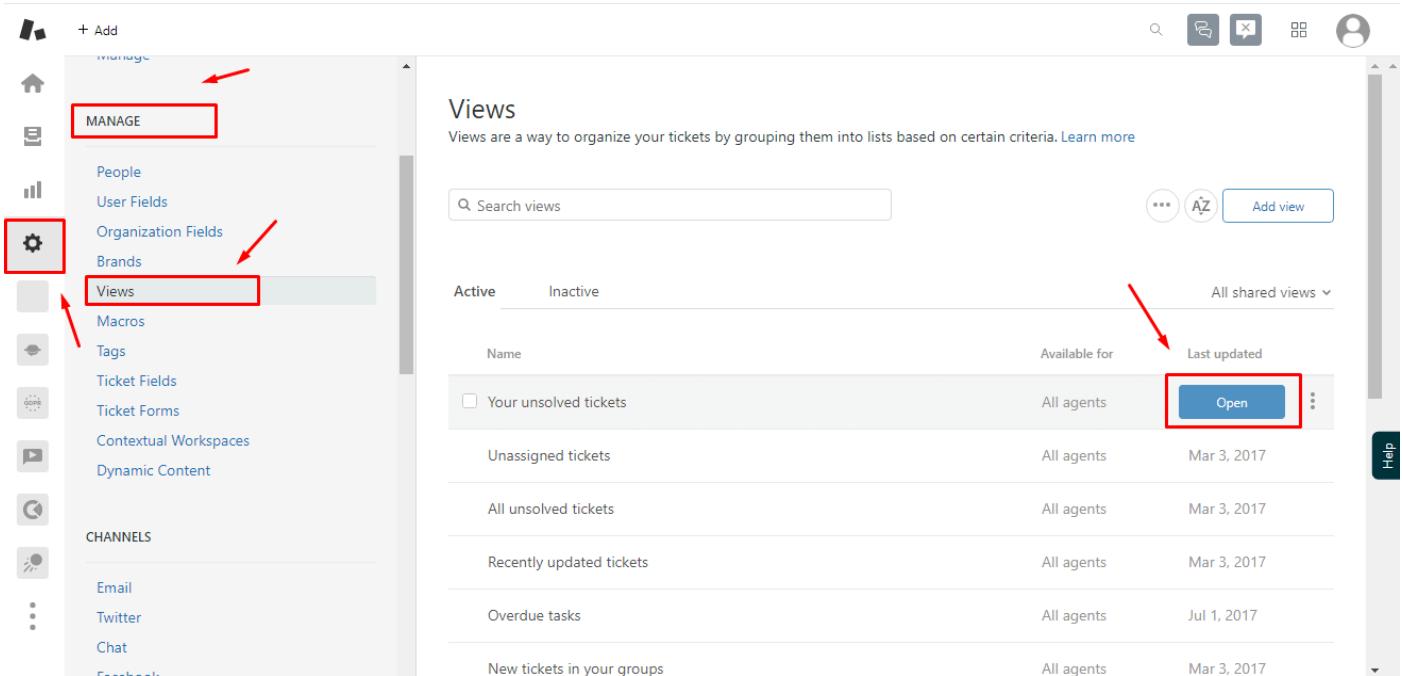
Migrations typically take 20 minutes to a few days, depending on data volume.

Note: Zendesk uses UTC time, so timestamps may differ from your local time.

Final Stage: What should I check after the Full Zendesk data migration?

Even if your Full Migration ran without errors, it's important to verify everything:

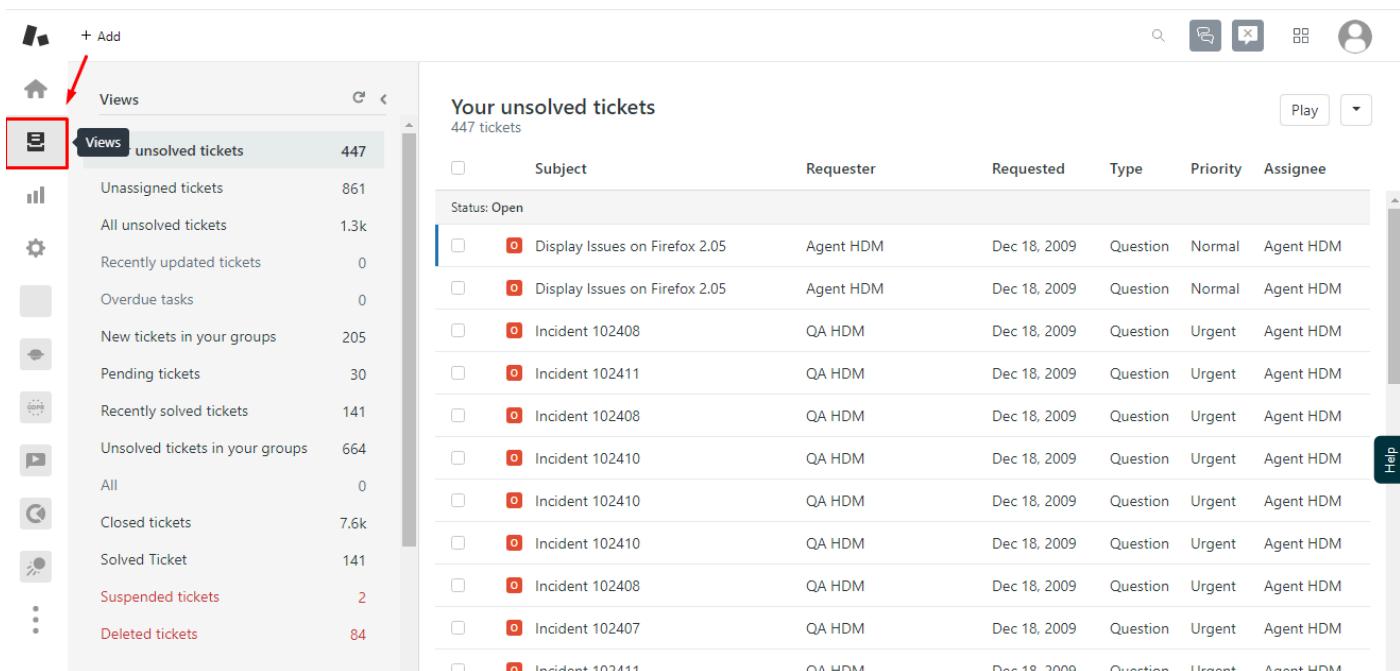
1. Go to **Admin > Manage > Views > Open** to access tickets by category.



The screenshot shows the Zendesk Admin interface. On the left, there's a sidebar with various management options like People, User Fields, Organization Fields, and Views. The 'Views' option is highlighted with a red box and an arrow. The main area is titled 'Views' and shows a list of ticket categories. Each category has a checkbox, a name, 'Available for' (All agents), and a 'Last updated' date. The first category, 'Your unsolved tickets', has a blue 'Open' button highlighted with a red box and an arrow. The interface includes a search bar, sorting options (Active, Inactive, Last updated), and a help button.

Name	Available for	Last updated
Your unsolved tickets	All agents	Open
Unassigned tickets	All agents	Mar 3, 2017
All unsolved tickets	All agents	Mar 3, 2017
Recently updated tickets	All agents	Mar 3, 2017
Overdue tasks	All agents	Jul 1, 2017
New tickets in your groups	All agents	Mar 3, 2017

2. Type * in the Zendesk search bar to view all tickets.
3. Check ticket counts, field values, attachments, and agent assignments.
4. Make sure data is readable, complete, and in the right place.



The screenshot shows the Zendesk interface. On the left, a sidebar titled 'Views' is open, showing various ticket categories with counts: Unassigned tickets (861), All unsolved tickets (1.3k), Recently updated tickets (0), Overdue tasks (0), New tickets in your groups (205), Pending tickets (30), Recently solved tickets (141), Unsolved tickets in your groups (664), All (0), Closed tickets (7.6k), Solved Ticket (141), Suspended tickets (2), and Deleted tickets (84). A red box highlights the 'Views' icon in the sidebar. On the right, a main panel titled 'Your unsolved tickets' shows a list of 447 tickets. The first few entries are: 'Display Issues on Firefox 2.05' (Agent HDM, Dec 18, 2009, Question, Normal, Agent HDM), 'Incident 102408' (QA HDM, Dec 18, 2009, Question, Urgent, Agent HDM), 'Incident 102411' (QA HDM, Dec 18, 2009, Question, Urgent, Agent HDM), 'Incident 102408' (QA HDM, Dec 18, 2009, Question, Urgent, Agent HDM), 'Incident 102410' (QA HDM, Dec 18, 2009, Question, Urgent, Agent HDM), 'Incident 102410' (QA HDM, Dec 18, 2009, Question, Urgent, Agent HDM), 'Incident 102408' (QA HDM, Dec 18, 2009, Question, Urgent, Agent HDM), 'Incident 102407' (QA HDM, Dec 18, 2009, Question, Urgent, Agent HDM), and 'Incident 102411' (QA HDM, Dec 18, 2009, Question, Urgent, Agent HDM).

How do I complete the setup in Zendesk?

Finalize your configuration to start working smoothly:

- Connect your email provider to Zendesk.
- Enable necessary notifications.
- Review and adjust automations, triggers, and ticket forms.
- Update internal links in your Knowledge Base.
- Set up email forwarding so new requests land in Zendesk.

What's next?

Run test tickets to confirm everything functions correctly.

Have questions or want our team to double-check your setup? [Contact us](#) — we're ready to assist.