Freshservice Data Migration Checklist

To ensure a seamless [Freshservice data migration](#), you need:

1. A clear, step-by-step guide covering each stage of the transfer.
2. A reliable solution, such as Help Desk Migration, to handle the process securely and efficiently.

Discover how to efficiently run a Freshservice Demo Migration with our detailed video guide. Follow step-by-step instructions for smooth and hassle-free transfer.

With Freshservice data migration by Help Desk Migration, you can:

- Securely move all your tickets, contacts, and support history
- Migrate knowledge base articles and custom fields accurately
- Avoid manual data entry and the risk of errors
- Minimize downtime and ensure uninterrupted support

Automate your data transfer to Freshservice and start optimizing your customer support operations. Boost team productivity, enhance service efficiency, and keep full access to your historical support data.

Before You Start Your Freshservice Data Migration

1. How to choose a date to prepare for Freshservice migration?

- Pick a day with minimal help desk activity to make the migration smooth and efficient. It's best to choose a time when business activity is low — consider the season, month, or specific days for the migration. Performing it on weekends or during periods with minimal customer inquiries is recommended.
- Give your team enough time to prepare for Freshservice migration.
- Encourage agents to explore Freshservice or focus on closing existing tickets.

2. Get your team ready before you migrate to Freshservice

It's important to brief your agents about Freshservice import or consider delegating particular tasks, like accelerating the review of Full Data Migration results.

- Ensure the entire team is involved in the migration.
- Make sure everyone understands the current stage of the migration.

- Clarify each team member's responsibilities.
- Complete onboarding for the new platform.
- Set a clear migration deadline.
- Explain how the migration process will proceed.
- Determine when team members can start working on the new platform.

3. How to prepare Freshservice for the data transfer?

- Replicate all custom fields from your current platform to ensure you can find your data easily after you migrate to Freshservice.

4. How do I create fields in Freshservice?

Create custom fields manually in Freshservice

- To add custom fields in Freshservice, go to Admin → Service Management → Field Manager.
- Drag and drop a field type (such as text, dropdown, or checkbox) onto the form (e.g., Incident, Service Request, Problem, or Change).
- Customize the field by setting its label, placeholder, and other options, then save it.
- You can also create custom fields for Assets, Requesters, Departments, and other modules within their respective sections in the Admin Center.
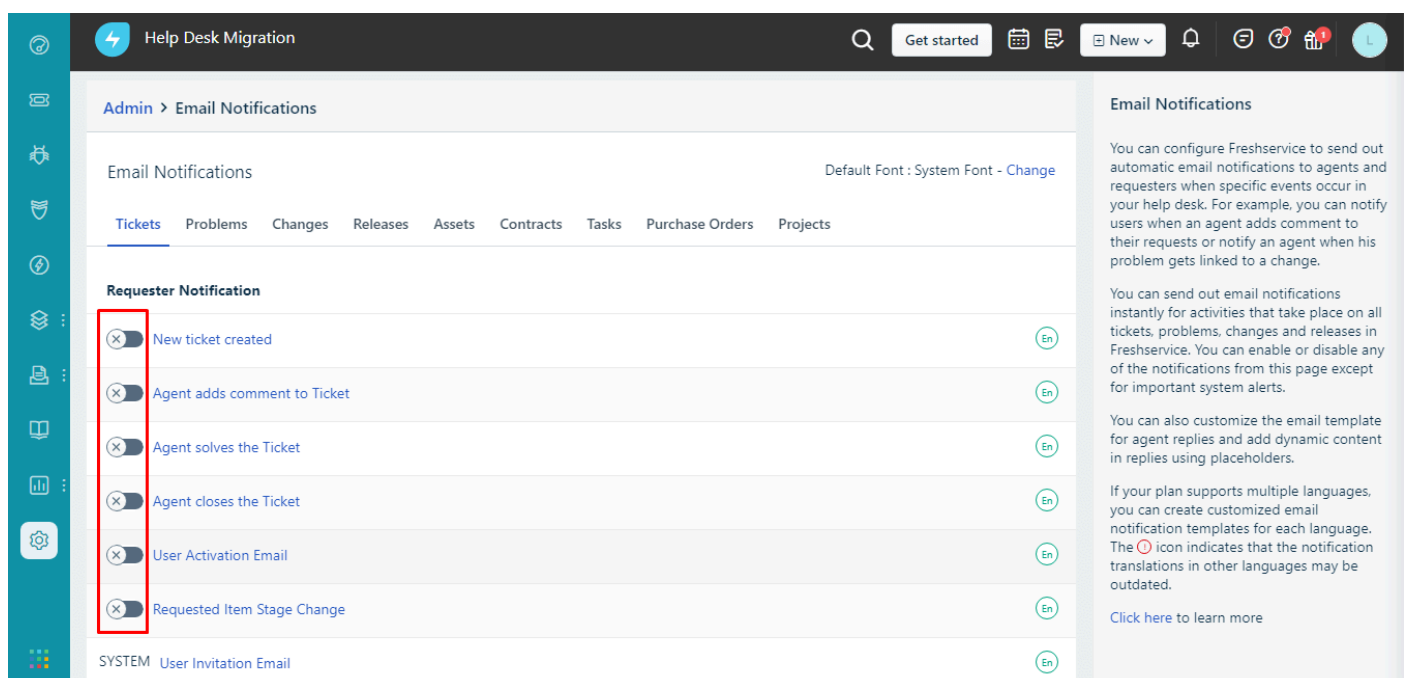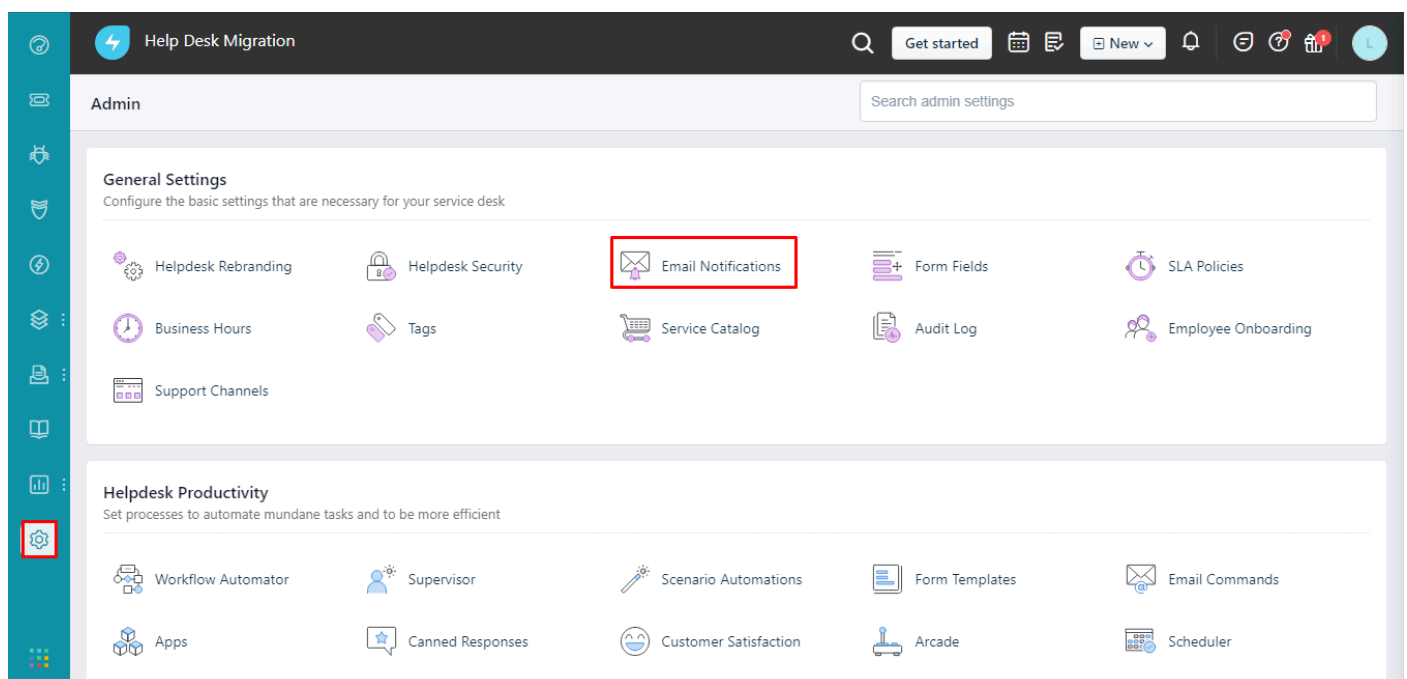
5. What should I do just before starting the customer service data migration to Freshservice?

Take a few quick steps before launching your Demo Migration to ensure a smooth, error-free process and prevent any unwanted actions in your target Freshservice instance.

1. Turn off notifications

Disable Email Notifications and other triggers, including validation and duplicate rules. That will save you from getting a pile of notifications during the Full Data Migration.

Go to Admin > under General settings, click Email Notifications > go through all tabs and disable email notifications.

Why disable triggers before migration?

If notifications, workflows, or automations are active during migration, they may:

- Send unwanted emails to agents/customers.
- Reopen or close migrated tickets.
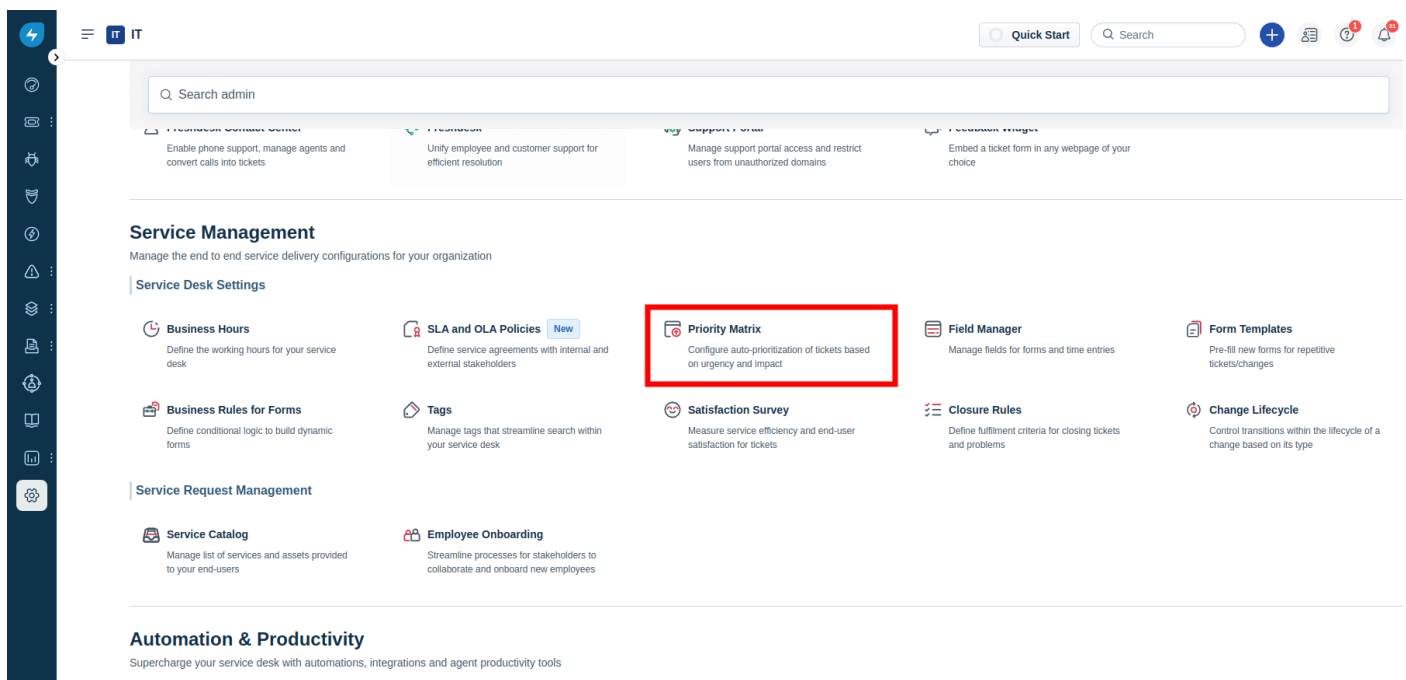- Slow down or interrupt the migration process.

2. Disable priority matrix

If you have the Priority Matrix enabled during the migration, then Freshservice will set priorities according to it. Therefore, the priority statuses will differ from those in the source help desk. If it's not a problem for you, then feel free to leave the Matrix enabled.
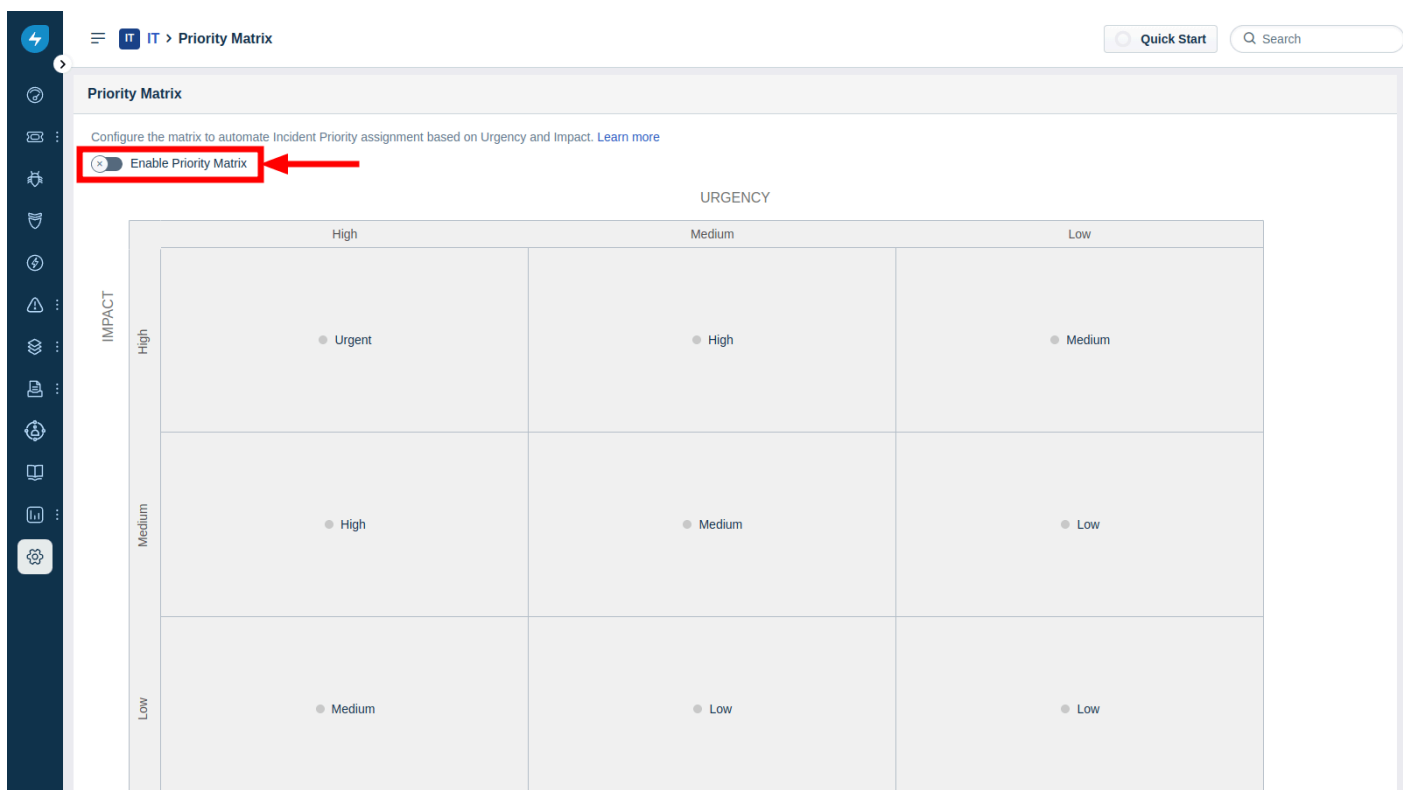
However, if you want to keep all priorities as they were in the source help desk, then you have to disable the Matrix before starting Demo and Full Data Migration.

Here's how to do it:

- Open up your Freshservice account.
- Go to **Admin > Priority Matrix** (under **Service Management**).

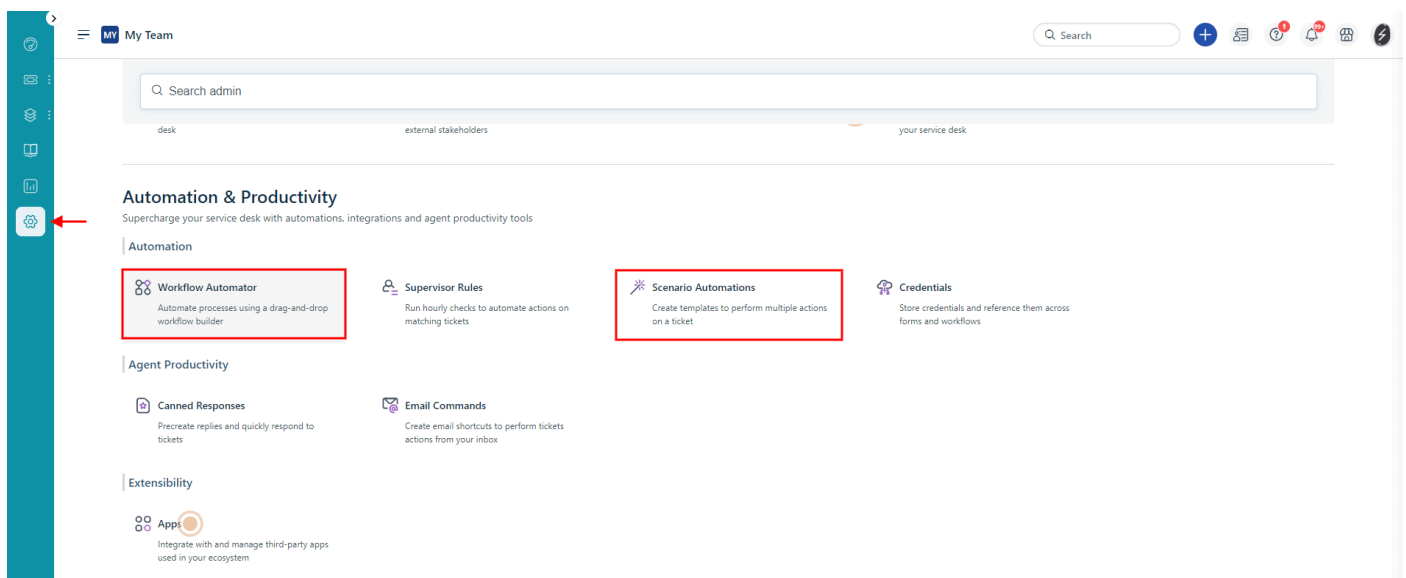- Toggle **OFF** the Enable Priority Matrix option.

Once the migration is over, you can go back to this menu and re-activate the Priority Matrix.

3. Turn off workflow automator and scenario automations

If migrating to Freshservice with active automation, disable all Workflow and Scenario automations beforehand to prevent email notices during ticket import. Here's how to do it:

1. Log in to Freshservice. Hover over the Admin panel in the left sidebar.
2. Go to Automations & Productivity.

3. Choose Workflow Automator and disable all active automation rules.

4. Open Scenario Automations and document all scenarios and afterward, delete them.

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

Alternatively, you can contact the Freshservice support team and ask to turn off all Requester and Agent notifications.

4. Deactivate closure rules

To prevent ticket status changes after Full Data Migration, disable Closure Rules to ensure all mapped data remains unchanged.

1. Go to the Admin panel. Scroll down to Service Management > Service Desk Settings.

2. Click on Closure Rules.

3. Disable all closure rules to prevent unexpected changes in ticket statuses. Click Save.

Note: if you have problems, turn off this feature for them too.

5. Should I disable Parent-Child ticketing?

Yes. The Parent-Child Ticketing feature in Freshservice (available on certain plans) can cause migration errors because 'Task'-type tickets depend on linked relationships.
If this field is missing, the Migration Wizard may fail to move those records.
Steps to disable Parent-Child Ticketing:

1. Log in as an **Administrator** and go to **Admin → Workflows → Parent-Child Ticketing**.
2. Toggle the feature Off in the top-right corner.
3. Confirm the action when prompted.
4. You'll receive a confirmation message once the feature is disabled.

Alternative:
If disabling automations or features isn't possible, use the 'Add a tag to migrated tickets' option in the Migration Wizard.
Then update your Freshservice workflows to exclude tickets with that tag, ensuring automations won't interfere with imported data.

6. What customizations are available?

If you have any specific requirements for Freshservice data import, contact our support team. The availability of customizations depends heavily on your source platform. Our automated data migration offers options like:

- Data filtering by different criteria (creation date, tags, custom fields, groups, organizations, assignees, etc.)
- 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, Closed At date of the ticket into the 1st private comment in a ticket, inline images as ticket attachments)
- Adding information to the migrated data (marking tickets with extra tags, adding legacy ticket ID to the ticket subject)
- Migrate contact custom fields

Step-by-Step Guide: How to Migrate to Freshservice with Help Desk Migration

Migrating your data from one Freshservice account to another doesn't have to be complicated. With Help Desk Migration, you can securely and efficiently transfer all your tickets, users, and knowledge base articles without losing valuable information. Follow this step-by-step guide to ensure a smooth Freshservice data transfer.

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

Before starting the Demo Migration, find the required access credentials to the source platform and Freshservice.

To connect Freshservice with Migration Wizard, you need:

- **URL**: URL of your company's Freshservice account. Example - https://domain.freshservice.com/.
- **API Key**: Profile icon -> Profile Settings -> Your API Key. If you have a Freshservice account, find how to enable your API key here.

2. Set up Freshservice data import

Before setting up the Full Data Migration, try the Free Demo. In brief, Migration Wizard exports 20 random source tickets and 20 knowledge base articles to Freshservice. You can edit your Demo Migration setting and re-run your Demo. Note that you get the same Demo results with the same settings.

1. Log in to your Migration Wizard account.
2. Connect your source and target systems.

To connect Freshservice with Migration Wizard, you need:

URL: URL of your company's Freshservice account. Example - https://domain.freshservice.com/.

API Key: Profile icon -> Profile Settings -> Your API Key. If you have a Freshservice account, find how to enable your API key here.

3. Choose the data you want to import to Freshservice

After connecting your accounts, choose the specific workspace you want to migrate. You can select which data entities to transfer:
Default migration:

- Tickets
- Requesters
- Departments
- Agents
- Groups of agents
- Solutions (folders and categories)

Check Available Fields and Record Types for Your ⚡ Freshservice Data Import

1. Match agents.
With Help Desk Migration, you can match agents from the source platform to the target platform and reassign tickets if an agent has left the company. Matching agents are required to run the Free Demo Migration, so ensure this step is completed carefully.
On the mapping page, click 'Match items' next to Agents. Map existing target agents via their emails or create new ones using 'Add the same staff on {target}'. Some help desks may require manual agent creation if API access is limited.

2. Map tickets and articles fields.

3. Choose automated options.
Help Desk Migration provides built-in, one-click migration features that can significantly improve

the efficiency and accuracy of your data transfer. For a Freshservice migration, you can choose from the following automated options:

- Add tags to newly migrated tickets
- Migrate the newest records first
- Skip attachments
- Migrate side conversations – when you migrate from Zendesk, you can move your side conversations as private notes in Freshservice, keeping internal discussions intact.
- Migrate call recordings – Imports Zendesk recorded calls as ticket attachments, preserving your complete support history.
- Migrate inline images as attachments

4. Set up your Free Demo Migration.

A Demo Migration in Help Desk Migration transfers a small sample of your data so you can verify that everything migrates correctly before running the Full Migration.

It includes:

- 20 tickets
- Their comments/notes
- Users (agents and end-users) linked to those tickets
- Companies/organizations linked to those users
- Basic fields and custom fields
- Attachments for the sampled tickets (if supported)
- A small sample of knowledge base articles (if included in your scenario)

The Demo Migration doesn't migrate all records — just enough to check mapping accuracy, formatting, field placement, and overall data structure in Freshservice.

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

Yes. Both Demo and Full Migrations use the same logic, mapping, and configuration.
If data appears missing or incorrect in the Demo, the same issue will occur in the Full Migration — so check your results carefully.

How to verify your Demo Migration results:

- Download the Demo Migration reports.
- Review migrated, failed, and skipped records.
- Contact support if any data looks incomplete or misaligned before starting the Full Migration.

Keep in mind: if anything hasn't migrated during the Demo Migration, it won't be imported during the Full Data Migration.

If you need more detailed information, [read this guide](#) exclusive to Freshservice.

Can I filter my help desk data before migration?

Yes. With Help Desk Migration, you can apply data filters to save time and transfer only the records that matter most. This helps keep your new Freshservice workspace clean and relevant. Keep in mind that API-level filtering may also lower migration costs, but filtering options vary depending on your source platform's capabilities.

After running the Demo Migration, you can fine-tune your setup by adding filters to specify which tickets to move. You can filter by:

- Date: Migrate tickets created or updated within a specific time range.
- Ticket Status: Include only tickets with certain statuses, such as Open, Resolved, or Closed.
- Agent: Transfer tickets assigned to specific agents or groups.
- Department: Filter tickets belonging to certain teams or service areas.
- Category or Impact: Narrow down tickets based on issue type or priority level.

You can also combine filters using AND/OR logic and group them for even more precise selection.

Important: Filters don't appear in the Demo Migration — they are applied only during the Full Migration.

What should I know while running a Full Data Migration to Freshservice?

Before launching your Full Migration:

- Verify that deleted or inactive requesters aren't marked as "Spam" in Freshservice.
- Inline images in KB articles will migrate as file attachments.
- Make sure required custom fields for Tickets, Requesters, or Departments exist.
- Ensure you have admin rights in both source and target accounts.

Running a Full Data Migration

1. Choose your migration options

Throughout Freshservice data migration, you can work on your source help desk. Just remember, records created or updated during Full Data Migration won't show up in Freshservice. To move all new and updated customer data, consider using Delta Migration.
The Migration Wizard operates in the cloud, so there's no need to keep the tab open. You can periodically check the Full Data Migration page or wait for a message from our team.

2. Run Full Data Migration

Our automated data migration service moves each record individually. Depending on your help desk data volume, the migration process can take anywhere from 20 minutes to a few days.
You can start your Full Data Migration as soon as your payment is confirmed. To minimize delays, consider making the transaction in advance or scheduling the data migration.

What should I check after the Full Freshservice Data Migration?

Once your Full Freshservice Data Migration is complete, take some time to verify that all information has been imported accurately:

- Make sure all tickets, requesters, and departments are visible and correctly organized.
- Check that custom fields, tags, and attachments are transferred without errors.
- Ensure that agent accounts, roles, and permissions are properly configured.
- Test your workflows, business rules, and automations to confirm they operate as expected.
- Review your data for any missing, incomplete, or duplicate records and record any irregularities.

What is a Delta Migration in Freshservice?

After the Full Migration, a Delta Migration transfers any new or updated records created since your initial migration began.
It keeps your Freshservice data synchronized without duplicating or overwriting records.

> **Important:** Avoid editing migrated tickets before running the Delta — such changes might be overwritten.
> If updates were made, the Help Desk Migration team can still adjust the process to avoid duplicates.

If you're having trouble finding specific records, be sure your search filters are set to include all tickets and any time period. If the issue persists, don't hesitate to [reach out to our support team](#).

What is an Interval Migration?

Interval Migration is a Help Desk Migration feature that lets you pause the data transfer during business hours and resume later, reducing downtime and disruption for active support teams. It's perfect for large datasets or situations where uninterrupted access to your help desk is essential, allowing the bulk of data to migrate during off-peak hours. Often, it's combined with Delta Migration to capture any new or updated records that arrive after the initial migration.

What if I notice missing or duplicated records?

Document any discrepancies and review your mapping setup. If the issue persists, contact our support team for assistance.

Freshservice Migration Scenarios

With Help Desk Migration, you can perform data transfers such as:

1. From your existing help desk platform to Freshservice

- (The most popular migration pairs include [Zendesk to Freshservice](#), [ServiceNow to Freshservice](#), Zoho Desk to Freshservice, and [Freshdesk to Freshservice](#).)

2. From CSV files to Freshservice
3. From Gmail to Freshservice