

HALO ITSM DATA MIGRATION CHECKLIST

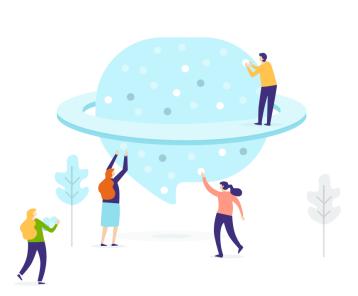


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contact@help-desk-migration.com

Moving your data to Halo ITSM might seem challenging, especially when leading with large records. But fear not! With a migration plan and an automated Help Desk Migration service, your Halo ITSM data transfer is on track for success. Move incidents, agents, contacts, and more with just a few clicks, all without downtime.

WHAT MIGRATION WIZARD CAN IMPORT TO HALO ITSM:

Entity	Related data
Tickets	 Created at, Updated at, and Closed at dates Custom fields Attachments Inline images Requesters Comments (Author, Created dates, and Visibility) Public notes Private notes
Contacts	
Agents	
Organizations	
Groups	
Articles	 Top level FAQ Lists Low level FAQ Lists Attachments Tags Inline image

Expert note: Make sure you have admin rights on both your Source and Halo ITSM accounts. And create agents, groups, and custom fields before setting up a test migration.



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WHAT DATA WON'T BE IMPORTED

Our data migration tool can't shift ticket tags, custom fields for organization and contacts, macros, triggers, automation, and other settings.

Have special requirements for Halo ITSM data migration? Let's discuss your needs and requirements, and our tech team will craft a solution for your migration project.

BEFORE YOU START DATA MIGRATION

To ensure a successful Halo ITSM data transfer, go through these preparation steps.

DATA MIGRATION PROCESS PLANNING

Every data migration is unique, and there's no one-size-fits-all solution for every data transfer. From our experience, we've pinpointed two methods:

- 1. <u>Automated data migration</u> or DIY migration
- 2. Custom data migration
- 3. Automated or custom data migration + Delta migration

If you require assistance with <u>planning and carrying out your data migration</u>, reach out to us. We're here to help you build your migration project.

PRE-MIGRATION SETTINGS ON HALO ITSM ACCOUNT

For a smooth Halo ITSM data migration, follow these steps:

1. To connect Halo ITSM, you need to fill in

- a. Authorisation Server: Go to Configuration \rightarrow Integrations \rightarrow Halo PSA API \rightarrow Authorisation Server.
- b. **Tenant**: Open Configuration \rightarrow Integrations \rightarrow Halo PSA API \rightarrow Tenant.
- c. <u>Client ID</u>: Navigate to Configuration \rightarrow Integrations \rightarrow Halo PSA API \rightarrow View Application \rightarrow New.



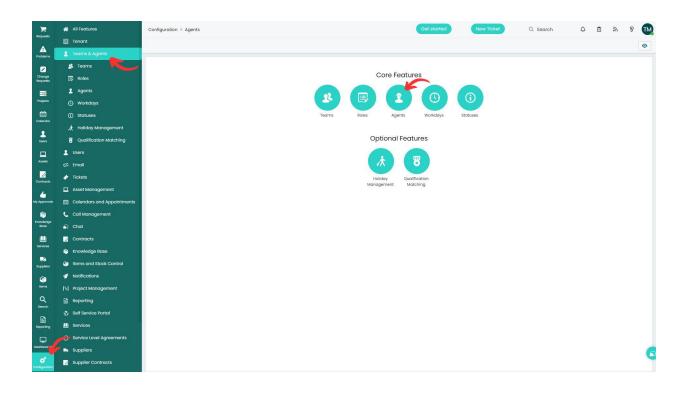
d. Client Secret: Hover over to Configuration \rightarrow Integrations \rightarrow Halo PSA API \rightarrow View Application \rightarrow New.

Reg Ado	d an Application
Details Permissio	ons Security
	Application Name * Enter the name of the Application here
	Authentication Method * Username & Password Implicit Flow (Single Page Application) Authorisation Code (Native Application) Client ID and Secret (Services)
	For backend non user-facing applications only. This method allows logging in just with a Client ID and Client Secret. A username and password is not needed. Client ID This is a unique identifier for your Application, and you will need this to Authenticate. Client Secret
	The Client Secret is used to access to the AP without logging in it stored, it should be encrypted and never shown. The Client Secret for this application will only be shown once. If you forget it you'll need to generate a new one. Generating a new Client Secret will stop the old one from working. Connerotate Connerotate Login Type* Agent to log in as * Agent X Select. ▼
	Save

Note: You can connect the cloud-based and on-prem versions in the same way; provide Authorisation Server, Tenant, Client ID, and Client Secret.

2. Add all source agent profiles you need to shift to Halo ITSM and ensure they have accepted the team invitation. Go to **Configuration** \rightarrow **Teams & Agents** \rightarrow **Agents** \rightarrow **New** \rightarrow **Details** \rightarrow **Preferences** \rightarrow **Save**.





Note:

- Halo ITSM has sample users without emails. Adjust existing agent profiles or set up new ones as needed.
- During a Free Demo setup, you can also create any missing agents using Migration Wizard.

3. Set up all source groups you need to move to Halo ITSM to enable group matching. Navigate to **Configuration** \rightarrow **Teams** & **Agents** \rightarrow **Teams** \rightarrow **New** \rightarrow fill in **Details**, **Agents**, and **Other** \rightarrow **Save**.



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0		Tickets		Enter the main email address for this Team here							
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6				Enter the phone number for this Team here							
My Approvals		Calendars and Appointments									
Knowledge		Call Management		Alternative Team Name Enter an alternative name for this Team here							
Base		Chat		Enter on alternative norme for this realminere							
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		Service Level Agreements		Vised for Opportunities							
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and generally											

Note:

- Halo ITSM comes with three default groups. Modify them or establish new ones.
- During Free Demo setup, you can create any absent groups using Migration Wizard.

4. Create custom fields that correspond to the source values. Hover over to **Configuration** \rightarrow **Custom Objects** \rightarrow **Custom Fields** \rightarrow **New** \rightarrow provide **Details** and **Visibility Restrictions** \rightarrow **Save**.



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Projects		Asset Management	Details	Visibility R	testrictions										_
		Calendars and Appointments			Field Name *										
Colendar	د	Call Management			This must only contain alphanumeric o	haracters and no spaces. The let	atters "CF" will automatically be added to	the start of the name to indicate th	at it is a custom field.						
1	2	Chat			This is the name of the field in t	he database									
Users	Ø	Contracts			Field Label *										
	۲	Knowledge Base			This is the label for the field										
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5. <u>Deactivate Approval Process</u> to ensure incident tickets transferred accurately. Click **Configuration** \rightarrow **Tickets** \rightarrow **Ticket Types** \rightarrow open a ticket type \rightarrow **Edit**. Choose **No** in the **Start an Approval Process** field. Then press Save.

6. <u>Switch off notifications</u> during data migration. Navigate to **Configuration** \rightarrow **Notifications** \rightarrow **General Settings** \rightarrow clear the checkboxes next to all notifications.

SETTING UP DATA TRANSFER TO HALO ITSM

Start your smooth data migration by setting up a free Demo Migration. It helps you test-drive migration settings before the big move. You can re-run your Demo as many times as needed to perfect everything.

Here's a simple guide to begin your Halo ITSM data migration:

STEP 1. SIGN UP FOR THE MIGRATION ACCOUNT

Set up a Migration Wizard account using Google, Microsoft, or your work email. If you choose the work email, confirm it by following the instructions sent to your email.



÷	Sign in to your account	
	Image: Sign In with Google Work Email (required) Image/geourgite.com Image: Sign In with Microsoft Password (required) Image: Sign In with Microsoft Forgot password? Image: Sign In with Microsoft Sign In	
0		Ø Chat

STEP 2. CONNECT YOUR SOURCE AND TARGET PLATFORMS

Depending on your help desk or service desk, you may need various access credentials (i.e., a URL, API token, or logging in with your platform account) to connect your source and target platforms.

The Migration Wizard gives handy tips as you go, making the connection process smooth.



•	MIGRATION SETUP	SOURCE		
	From: ZENDESK Urk:https://domain.zendesk.com	Zende	esk connected	
	To: HALO ITSM	TARGET	N	
	Choose Objects: NOT SELECTED	Migrate to	: Halo ITSM Cell your flows partnern	
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			● Golo [configuration > Integrations > HoldTPR AP[-> View Application -> Hew	
		Continue >	cess credentials with third parties and guarantee the safety of year data according to our Security Policy.	
-				
?	SUPPORT HOURS Monday to Friday 01:43 PM in Kyn, Ukraine 8:00 AM to 12:00 AM			Øır

To connect Halo ITSM as your Target platform, provide Authorisation Server, Tenant, Client ID, and Client Secret.

STEP 3. CHOOSE WHAT DATA OBJECT TO TRANSFER

Pick the customer service data you want to move to Halo ITSM, then map groups, agents, tickets, and articles.

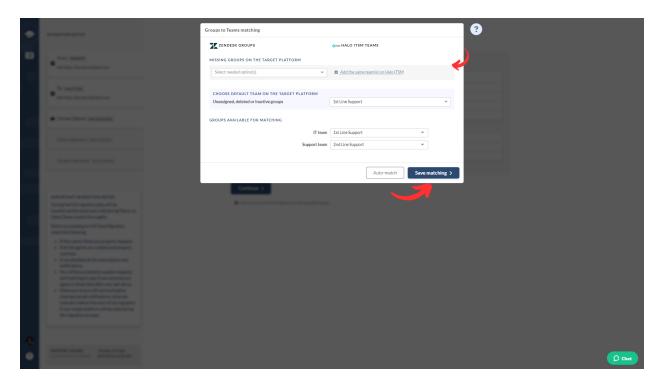


MIGRATION SETUP	Select Objects		
From: ZENDESK Url:https://domain.zendesk.com	HELP DESK OBJECTS	Omm HALO ITSM	
	Groups	Teams	
-	Agents	Agents	
TO: HALO ITSM	Organizations	Clients	
Url: https://domain.haloitsm.com	Customers	Users	
Choose Objects: NOT SELECTED	Tickets	Incidents	
CHOSE COJECCI NOI SELECTED	KNOWLEDGE BASE OBJECTS		
Demo migration: NOT STARTED	Categories	Top level FAQ Lists	
	Sections	Low level FAQ Lists	
All data migration: NOT STARTED	Articles	Articles	
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India etc.) before the start of the migration if you tracept platform will be used during the migration process. SUPPORT HOURS Cl. do India kyp, Usigine 800 AM to 1200 AM			

STEP 4. MATCH GROUPS

Select '**Match items**' to map groups between the Source and Halo ITSM. For unassigned tickets or deleted groups, choose a default one. Plus, you can create any missing groups - whether it's one or multiselect!



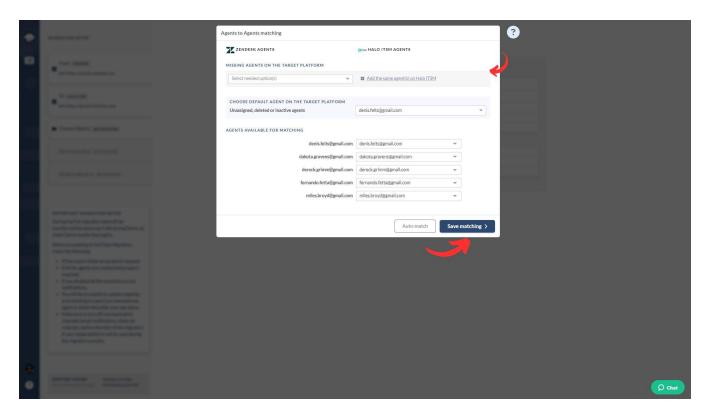


Click 'Save matching' to proceed. Use 'Auto match' for groups if you run the Free Demo again.

STEP 5. MATCH USERS

Match users between Source and Halo ITSM users. If you've any unassigned, inactive, or deleted users, pick a default user to those records. In Migration Wizard, you can add any missing user profiles right to Halo ITSM while matching.





Hit 'Save matching' to move on to the next step in mapping your data.

STEP 6. MAP TICKETS

Selecting the ticket checkbox opens a window to map ticket fields. System fields like subject, organization, and group are automatically mapped. Navigate to default and custom ticket fields.



		Tickets to Incidents mapping Check out our data mapping guide to go over this step easily and fa	t	× 🕄
		Z ZENDESK TICKETS	Omm HALO ITSM INCIDENTS	
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			ng Awaiting Approval 👻	
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		Norr	al Medium 👻	
		н	sh High 👻	
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For custom field mapping, make sure to set them up in Halo ITSM beforehand. Once everything is set, click 'Save mapping' to proceed.

STEP 7. MAP ARTICLES

Select '**Map items**' to match article fields. Here, you can map article statuses between your Source and Halo ITSM accounts. Once you're finished, hit '**Save mapping**' to move forward.



٠		Articles to Articles mapping Check out our data mapping guide to go over this step easily and fast.	×
		ZENDESK ARTICLES	Gmm HALO ITSM ARTICLES
	· · · · · · · · · · · · · · · · · · ·	FIELDS AVAILABLE FOR MAPPING	
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STEP 8. OUT-OF-THE-BOX CUSTOMIZATION OPTIONS

The pre-built customization options depend on the specific data migration pair. For example, if you're moving from Zendesk to Halo ITSM, here are your customization choices:

- Import inline images as ticket attachments. Keep all details of your customer communication history even if your Source platform is down.
- Skip attachments. By default, Migration Wizard moves all attachments, but you can skip them for storage efficiency or a quicker data migration.
- Move call recordings as attachments for easy future access.
- Use "Demo with custom data" to move 20 chosen tickets and articles for a preview.
- Transfer side conversations into private notes to keep customer context.
- Migrate content translations to keep your Help Center multilingual.



MIGRATION SETUP	MAPPING Selec	t Objects				
From: ZENDESK.	HELP D	ZENDESK VESK OBJECTS		Omme HALO ITSM		
		Groups	at Match items	Teams		
		Agents	₩atchitems	Agents		
Url: https://domain.haloitsm.com		Organizations		Clients		
		Customers		Users		
Choose Objects: NOT SELECTED	~	Tickets	Map fields	Incidents		
Demo migration: NOT STARTED	,	Migrate inline images as ticket attachments Keep embedded images even when your source	te is unavailable. It may increase the migra	ation time		
All data migration: NOT STARTED	(.	Slop attachments Keep ticket attachments, or leave them behind	d to save storage space or migrate faster			
	>	Migrate call recordings Move all your call recordings as attachments Demo with custom data				
IMPORTANT MIGRATION NOTES During the Full migration data will be transferred the same way it did during Deno, so check-Deno results throcapity.		Denovine Coston roads Choose up to 20 records by IDs and Import the Migrate side conversations Move all your side conversations	em to check how the data lands on a targe	t		
Before proceeding to Full Data Migration,	KNOWI	LEDGE BASE OBJECTS				
check the following: If the custom fields are properly mapped. 		Categories		Top level FAQ Lists		
If all the agents are created and properly		Sections		Low level FAQ Lists		
matched. If you disabled all the automations and	v	Articles	🌣 Map fields	Articles	× 1	
the state of		Migrate content translations Import language versions of your KB articles			2	
agent or ticket held after your last demo. Make sure to turn off communication channels (smail notifications observer		Demo with custom data Choose up to 20 records by IDs and import the	em to check how the data lands on a targe	t		
rules etc.) before the start of the migration if your target platform will be used during the migration process.	A.	have questions on the fields mapping? Let us help you!				
G	Continu					
SUPPORT HOURS Monday to Friday 01:46 PMIn Kylr, Ultraine 8:00 AM to 12:00 AM	Click to st	tart a free trial migration to the specified target.				D Chat

Once you're done mapping data, click '**Continue.**' If you missed anything, the Migration Wizard will remind you to review it.

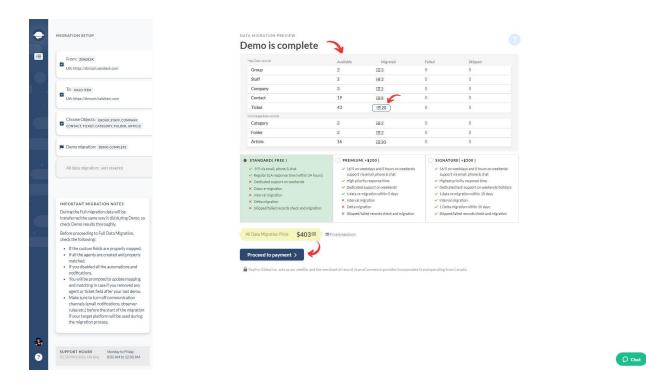
WHAT TO DO AFTER THE DEMO DATA MIGRATION

After finishing your Free Demo to Halo ITSM, follow these steps.

ASSESSING DEMO RESULTS

It's important to check the Demo migration results because the process mirrors the Full Data Migration. If some records weren't imported in the trial migration, they won't be extracted in the Full Data Migration.





Open reports for migrated, skipped, and failed records, and verify each by checking IDs on the Source platform and Halo ITSM.

Explore the Migrated Tickets Report		
	ORIGINAL RECORDS	MIGRATED RECORDS
Lost package 🌘	620533 (open)	2871 (open)
Lost emails 🏮	620531 (open)	2872 (open)
Lost access credentials 🏮	620532 (open)	2873 (open)
How to import tickets from a CSV file?	620535 (open)	2874 (open)
How It Works 🏮	620536 (open)	2875 (open)
How to import tickets from a CSV file?	620539 (open)	2876 (open)
Received a broken TV 🌘	620541 (open)	2877 (open)
Import customer service 🏮	620542 (open)	2878 (open)
In need of a new phone 🏮	620546 (open)	2879 (open)
Looking for my package 🌘	620543 (open)	2880 (open)
Find the source platform records IDs in the ORIGINAL RECO RECORDS column. For platforms with ID-based URLs, simply locate the record by it's ID.		
~<	1 2 >>	Close
Present to payment 1		

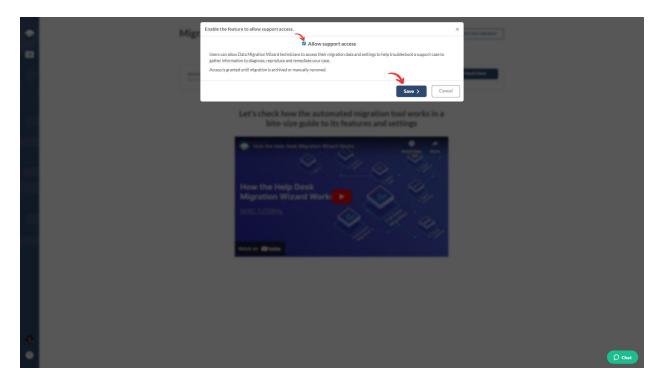


WHAT TO LOOK FOR WHEN CHECKING MIGRATED RECORDS

- All comments were moved, and the authors remain the same.
- Tickets are correctly assigned to users.
- Contacts and organizations migrated accurately.
- Articles migrated with their original statuses.
- Attachments were transferred as expected.
- The Demo data wasn't affected by automation rules.

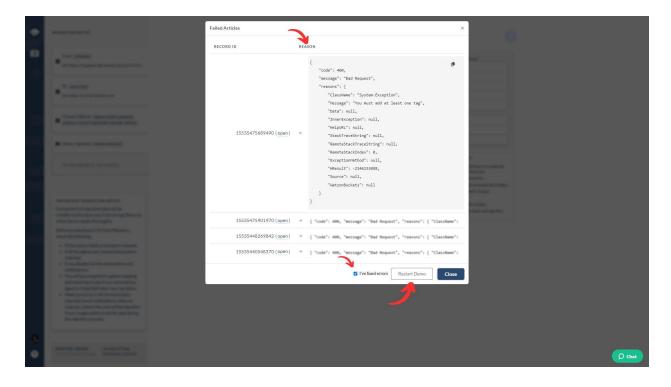
MANAGING SUSPENDED DEMOS

If your Free Demo gets suspended, stay calm and let our support team assist you in resolving the issue. Ensure they have access to your Halo ITSM data migration for a quick resolution.



If you encounter any failed reports, identify the issue by checking record IDs. If possible, fix the problem, tick the '**I've fixed errors**' box, and restart the Demo.





CHOOSE SUPPORT PACKAGE

No matter the size of your data migration project, Help Desk Migration has support that fits. Whether you prefer basic help or need extras like Delta, re-migration, or Interval migration, <u>pick the support plan</u> that suits your data transfer requirements.

STANDARD(FREE)	PREMIUM(+\$200)	SIGNATURE(+\$500)
 9/5 via email, phone & chat Regular SLA response time (within 24 hours) 	✓ 16/5 on weekdays and 8 hours on weekends support via email, phone & chat	 16/5 on weekdays and 8 hours on weekends support via email, phone & chat
× Dedicated support on weekends	 High priority response time 	 Highest priority response time
× Data re-migration	 Dedicated support on weekends 	 Dedicated tech support on weekends/holidays
< Interval migration	✓ 1 data re-migration within 5 days	 1 data re-migration within 10 days
× Delta migration	× Interval migration	 Interval migration
 Skipped/failed records check and migration 	× Delta migration	 1 Delta migration within 10 days
	× Skipped/failed records check and migration	 Skipped/failed records check and migration

Explore the extra perks provided in Premium and/or Signature plans:

	Re-migrate your data within 5/10 days after the Full Migration.
Interval Migration	Pause your migration on workdays and resume on weekends or a schedule your data transfer.



Help-Desk-Migration.com

contact@help-desk-migration.com

Delta Migration	Update or add tickets and articles created during or after the Full Migration with Delta Migration. Be cautious about potential duplicates if you continue working on the source platform.
Skipped/Failed Records Check	Use the Skipped/Failed Records Check for a comprehensive custom migration.

PRICE BREAKDOWN AND PAYMENT

Review the detailed price breakdown to get a clear explanation of the Full Migration cost.

Help Dest records \$26000 Group Convected Base records \$28000 Staff Out-of-the-box customization Ourget for the stease duration spokes \$34900 Contact Migrate inline images as ticket attachments \$24000 Contact Migrate content translations in the view torsas the nigration image interview of view torsa in unwaliable. It may increase the nigration image interview of view torsa in unwaliable. It may increase the nigration image interview of view torsa in unwaliable. It may increase the nigration image interview of view torsa in unwaliable. It may increase the nigration image interview of view torsa in unwaliable. It may increase the nigration image interview of view of view torsa in unwaliable. It may increase the nigration image interview of view torsa in unwaliable. It may increase the nigration image interview of view torsa in unwaliable. It may increase the nigration image interview of view torsa interview of view torsa interview of view	Demo	Migration data Price for the selected records migration	\$54 ⁰⁰		
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Once you're ready, input your billing details and click 'Submit order' to finalize the payment.

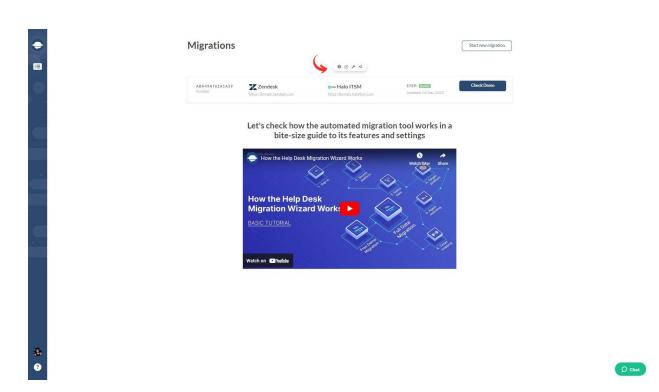


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GRANT ACCESS TO YOUR TEAM AND CUSTOMIZA THE MIGRATION NAME

The mapping step might seem a bit tricky, so feel free to get a hand from a colleague by <u>sharing your Halo</u> <u>ITSM data transfer</u>.



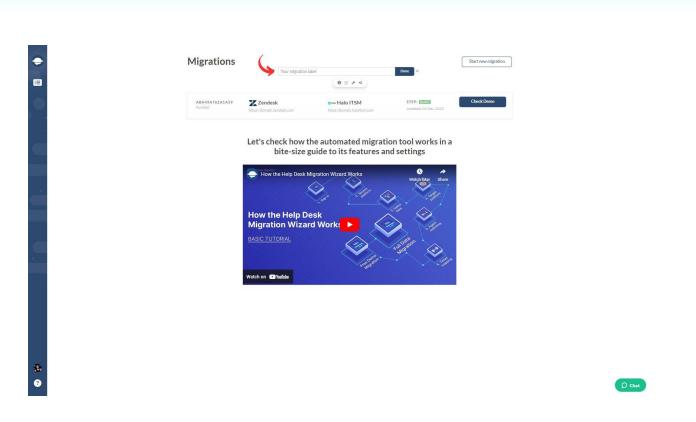


You're in control—you can grant full or restricted access, and if needed, you can revoke it.

	Share migration access			×
+	GIVE ACCESS TO ANOTHE	RUSER		
	Full Name (required)	John Doe		
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If you're handling multiple data migrations, give each a unique name for quick and easy recognition.





START FULL DATA MIGRATION

Once your payment is confirmed, you can start or schedule your data transfer. Avoid last-minute changes in your source platform for a hassle-free migration experience.



MIGRATION SETUP	DATA MIGRATION PREVIEW Demo is complete					
From: ZENDESK	Held Desk records	Available	Migrated	Failed	Skipped	
Url: https://domain.zendesk.com	Group	2	1≣3	0	0	
	Staff	2	:≡3	0	0	
TO: HALO ITSM	Company	3	1≣2	0	0	
Url: https://domain.haloitsm.com	Contact	19	:≡8	0	0	
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Choose Objects: group staff, company, CONTACT, TICKET, CATEGORY, FOLDER, ARTICLE	Category	2	:≡2	0	0	
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Demo migration: DEMO COMPLETE	Article	16	:≣20	0	0	
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IMPORTANT MIGRATION NOTES During the Full migration data will be transferred the same way It did during Demo, so check Demo results thoroughly.	Creating above Skipped/failed records check and migration	× Deltamig		✓ 1De	ita migration within 10 days ped/failed records check and migration	
Before proceeding to Full Data Migration, check the following:	All Data Migration Price \$403 ⁹⁹	Price breakdown				
If the custom fields are properly mapped. If all the agents are created and properly matched.	✓ Thank you! Your payment has been received.					
 If you disabled all the advantations and notifications. You will be prompted to update mapping and matching in call if you removed any agent or totake their after your last demo. Make sure to board for communication channels femall notifications clean re- rules esc) before the start of the migration if your trape platform will be used during the migration process. 	Start full data migration 🤌 📑	Schedule full data	mieration			
SUPPORT HOURS Monday to Priday CoSSI PMIn Kylik, Caraine 800 AM to 2200 AM						(

The data migration duration depends on the number of records; on average, about 2000 tickets per hour. Need it faster? Ask your vendors to boost your API limits—just give us a heads-up before diving into Full Data Migration.

If any questions appear, our support team is here for you. Your seamless Halo ITSM transfer is our priority.



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.

叉

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

