

Free help desk migration checklist

Audit current system

- Review workflows
 - Review automations
 - Review integrations
 - Identify active support channels
 - Document custom fields and ticket statuses
 - Review SLA policies and escalation rules
 - Identify migration stakeholders
-

Migration ownership

- Project lead assigned
 - Technical lead assigned
 - Support team lead assigned
 - QA/testing owner assigned
-

Backup data

- Tickets
 - Contacts
 - Knowledge base
 - Reports
-

Data mapping

- Statuses
 - Priorities
 - Tags
 - Custom fields
-

Testing

- Import sample tickets
 - Validate workflows
 - Verify permissions
-

Rollback preparation

- Retain old system access
 - Backup exports
 - Restore procedures documented
-
