



# CASE STUDY

## Zendesk to Salesforce Migration



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This guide is tailored for a Zendesk to Salesforce migration, drawing from our experience. Many of these steps can also be applied to migrating from other ticketing applications to Salesforce.

## Zendesk to Salesforce Terminology Definitions

### Planning

### Gather Requirements

### Data Migration

## Zendesk to Salesforce Terminology Definitions

<b>Zendesk</b>	<b>Salesforce</b>
Organizations	Accounts
Customers	Contacts
Tickets	Cases
Categories	Data Category Level 1
Sections	Data Category Level 2
Articles	Knowledge Article
Agents	Users

## Planning

In any project, it is essential to understand the specific tasks, delivery timelines, and the customer-side team involved. Grasping the project scope is crucial for its success, which I refer to as the planning phase.

I use a template to outline each section of the project scope. Below, I have included some questions to help you understand the scope and timeline for your project.

- **Organizations and Customers:**
  - Will data be sourced entirely from Zendesk or based on specific criteria?
  - Who will assist with data transformation?
- **Tickets:**
  - Is historical data migration necessary?
    - If so, what specific data? (e.g., ticket data, emails, tasks, attachments)
    - Over what timeframe? (e.g., All Time, last 5 years)
  - Who will assist with data transformation?

- **Knowledge Articles:**
  - Are all articles intended for migration?
  - Who will assist with data transformation?
- **Community Site (Self-Service Portal):**
  - Identify required features such as:
    - Articles
    - Discussions
    - Ticket Creation/Viewing
    - Chat feature
    - Others
  - Determine the authentication method
- **Go Live Training and Launch Plan:**
  - Who will conduct the training sessions?
  - Is there a need for creating a guide?
  - What is the scheduled go-live date?
- **Team Identification:**
  - Who are the key team members from the customer side involved in this project?

## Gather Requirements

This is where all the details come into play. As a detail-oriented person, I need to fully understand all aspects before starting the design. During this phase, you can ask numerous questions, view demos of the current system, and identify the necessary reporting metrics. Reporting is crucial and will significantly influence the design process.

- **Schedule a demo of the current system to observe usage**
- **Document and review to determine relevant automations**
  - Macros
  - Assignment Rules
  - Email templates
  - Quick Text
  - Escalation Rules
- **Evaluate methods of Ticket Creation**
- **Discuss and document new processes for migration**
- **Review hierarchy structure of Organizations and customers:**
  - Multiple Level Structure
  - Custom fields to migrate (e.g., account number, site location ID)
- **Review currently collected data points for ticket creation:**
  - Assess relevance of each data point
  - Determine data type for each
  - Identify the need for new data points for new processes
- **Review Agents:**
  - Identify internal and external users.
  - Evaluate current Views
- **Review knowledge articles**
  - Will migration of these articles be done?
  - Determine all articles to migrate

- Assess images and links specific to current application.
- Identify used categories/sections.
- Differentiate internal vs external categories/articles
- **Review Community Site**
  - Determine required security levels
  - Specify public-facing or restricted parts
  - Features requiring login
  - Define client access requirements
  - Assess links to and from other sites
  - Determine use of a chat feature
- **Define Reporting Metrics:**
  - Determine essential metrics during design
  - Ensure availability of necessary data points; create fields if needed
- **Assess need to import historical data (tickets and notes):**
  - Specify historical data required for import

## Data Migration

Data migration is a critical step in any project, as it involves determining which information from the old system needs to be transferred along with the customer data. This process can impact the design, potentially requiring the creation of new fields to accommodate values from the legacy system. Here are some key considerations to keep in mind.

- **Export all Organizations:**
  - Export all or a subset?
- **Export all Customers.**
- **Export all Tickets:**
  - All or a subset?
  - Do you need related records like notes and emails?
- **Data Transformation for Tickets:**
  - Understand the values:
    - Are you maintaining the same values from Zendesk or incorporating new ones?
  - Methods for incorporating new values:
    - Replace all values in the file before import.
    - Import values as is and perform a replace values operation on the field setup page
- **Data Transformation for Organizations/Customers:**
  - Check if they already exist in Salesforce.
  - Determine the identifying factor for existence check.
  - Ensure ZendeskID is imported with Organizations for customer and ticket loading
- **Importing Data:**
  - Import in the following order:
    - Organizations
    - Customers
    - Tickets
    - Ticket Notes



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