

Desk to Service Cloud Migration Tool Guide

The Desk to Service Cloud Migration Tool allows you to migrate core data and metadata from your existing Desk.com instance to your new Service Cloud instance. Please see the details below to learn about the migration process and what you should expect to see in Service Cloud after running the tool.

Installation and Setup

1. Prerequisites:
 - a. Lightning
 - i. The app runs in Lightning only. If you don't have Lightning, you must Preview from the Lightning installation guide in order to run the app.
 - b. Custom Domain
 - i. The app won't work without a custom domain for your org.
 - ii. See this guide for instructions on deploying a custom domain: https://help.salesforce.com/articleView?id=domain_name_guidelines.htm&type=0
2. Installation:
 - a. Log into your Salesforce instance and navigate to AppExchange.
 - b. Enter "Desk to Service Cloud" to search for the migration tool.
 - c. Install the App directly from the AppExchange.
 - i. If you're installing into a production org the link should start with "login.salesforce.com"
 - ii. If this is a sandbox change the URL to "test.salesforce.com"
 - iii. Don't forget to grant access to admins.

USER PERMISSIONS AND SETTINGS:

We recommend that you create a migration user in Salesforce and login as that user when using the tool.

Migration users should have the proper system permissions for the data in your migration. Some permission examples include but are not limited to:

- i. System Administrator profile
- ii. Assign migration user the SCMT Audit Permission Set (see below)
- iii. Full access to all the fields and objects in the migrated data
- iv. Live Agent should be available for moving LiveAgent Chats. See the instructions [here](#).
- v. Knowledge should be enabled from the Profile setting if you are migrating articles.

Click [here](#) for a video demo of the full setup.

1. In Setup → User Interface, enable "Set Audit Fields upon Record Creation" and "Update Records with Inactive Owners".
2. In Setup → Custom Code → Custom Metadata Types
 - a. Click "Manage Records" next to Desk Config
 - b. Edit "SCMT Configuration"
 - i. Check the "Active" box if it is not already.
 - ii. Update the fields with your Desk.com url and tokens. Endpoint should be in the format "<https://yoursite.desk.com>" without the quotes. Your consumer key/secret and token key/secret can be found in Desk under your client application's details in Admin → Settings → API Applications.
 - iii. Save.
3. Setup → Manage Users → Permission Sets
 - a. **Clone** the SCMT Audit permission set and set a unique description so you can tell it apart from the original. **Do not change any of the other fields.**
 - b. Enable System Permissions → "Set Audit Fields upon Record Creation"
 - c. Enable System Permissions → "Update Records with Inactive Owners"
 - d. In the Object permissions settings, enable the SCMT record type for Accounts, Contacts and Cases.
 - e. Now assign the permission set to the user who will run the migrations. Manage Assignments → Add Assignments → Select a user.
 - f. Don't forget step e.

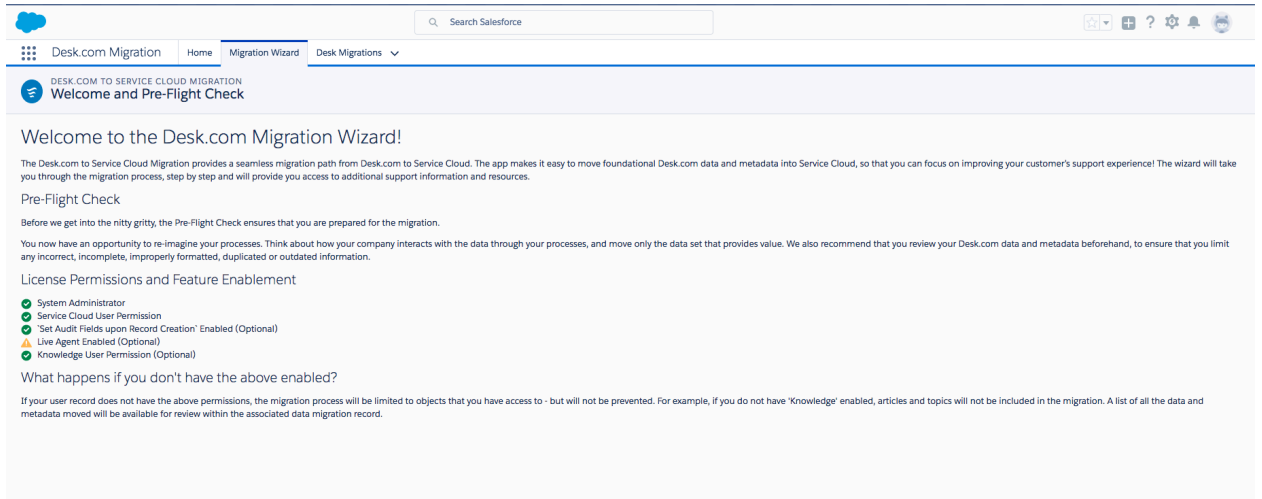
Migration Steps

To use the tool, select **Desk.com Migration** from the apps menu. Select the **Migration Wizard** tab.

Here's a quick video showing the Wizard in action: <https://screencast.com/t/ROcSKvZvPZ>

Step 1: Pre Flight Check

- a. If you have all the **License Permissions and Feature Enablement** items checked, proceed to next step.
- b. Otherwise, see the “User Permissions and Settings” step above.



Step 2: Connect to Desk

- a. If you entered your credentials in the Custom Metadata Record from the setup stage, you should see your credentials here already.

DESK.COM TO SERVICE CLOUD MIGRATION
Connect to Desk.com

Great! Now that you're fully prepped, let's connect to your Desk.com Environment. In order to provide authenticated access to Desk.com, please input your Desk.com Authentication Tokens below. You can find instructions for generating tokens in the [Authentication Tokens](#) section of the [Embedding the Mobile SDK](#) article or [Figure 5: Desk.com Settings](#) screen section of the [Hipmob - Desk.com Integration](#) article.

- * Desk.com Endpoint:
- * OAuth Consumer Key:
- * OAuth Consumer Secret:
- * OAuth Access Token:
- * OAuth Access Token Secret:

Back Continue

- b. If not, please enter them. Endpoint should be in the format “<https://yoursite.desk.com>” without the quotes. Your consumer key/secret and token key/secret can be found in Desk under your client application’s details in Admin → Settings → API Applications.

Secure <https://zzz-minjunyang.desk.com/admin/settings/api-applications>

Admin Search Settings Minjun Yang

DASHBOARD TEAM CHANNELS CASES CONTENT APPS ⚙️

SETTINGS

- Site Settings
- Contact Info
- Business Hours
- Outbound Mailboxes
- Outbound Mail Errors
- Multilingual Support
- System Log
- API
- My Applications**
- Authorized Applications

1 Application Add API Application Request Limit: 500 /min

Setup integration interfaces for your other business application and websites to read and write from your Desk.com help desk information. Be sure to read the latest [API Documentation](#).

SC Migration Tool Test

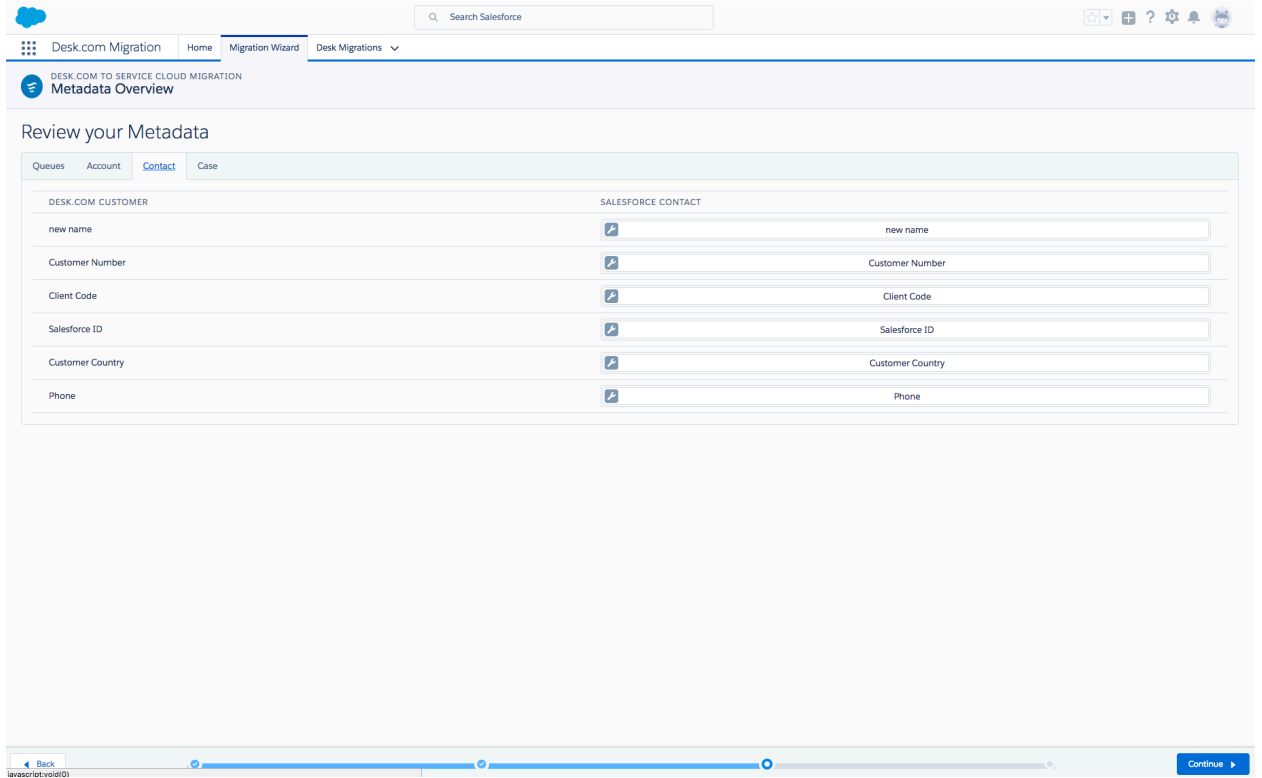
- Key
- Secret
- Website URL
- Callback URL
- Support URL

[Your Access Token](#)
[Your Mobile SDK Token](#)

- c. Proceed to the next step.

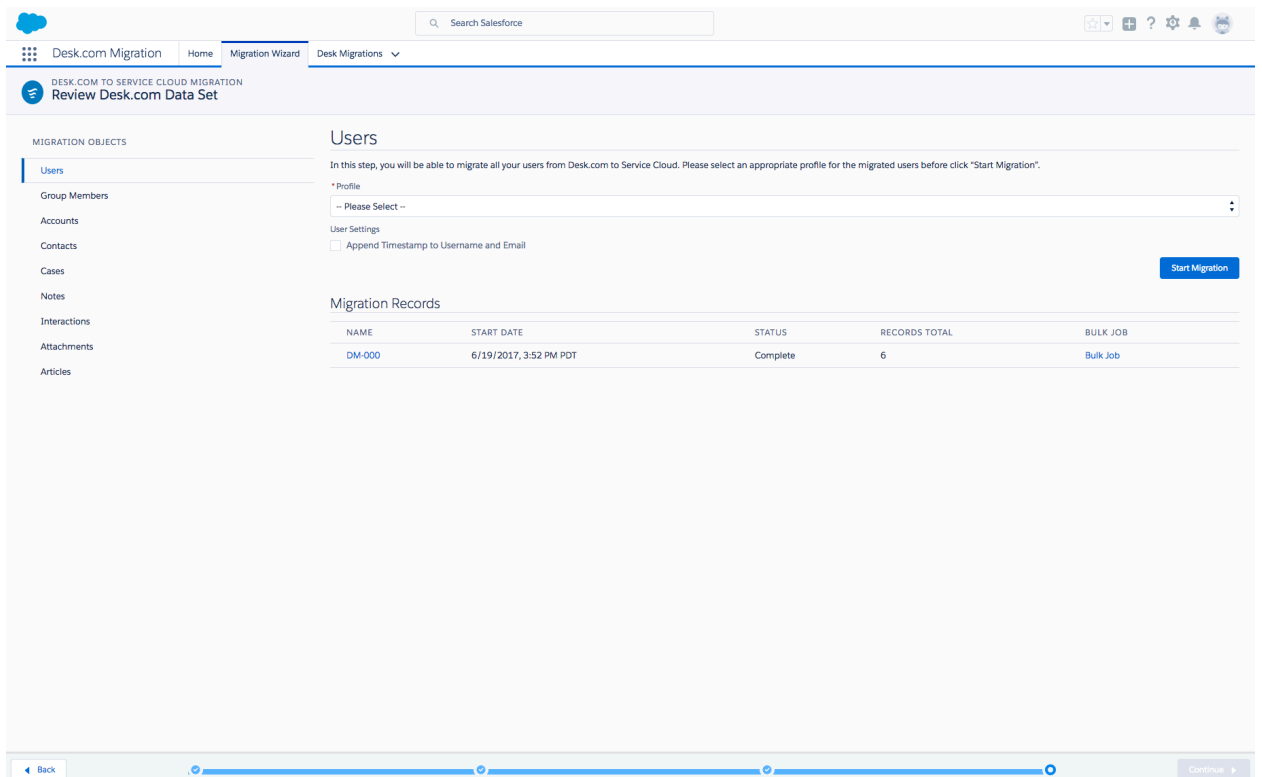
Step 3: Review Your Metadata

- This step is primarily to show you which fields and queues will be created in Salesforce. Initially, the fields will be blank. Clicking Next will initiate this migration.
- If you click Back from step 4, you'll see that the fields and queues are now created.



Step 4: Migrate Objects

- Migrate each object in order starting with Users. It's recommended that you wait for each step to complete before moving to the next one.
- Be sure to check the Bulk Job to make sure no records failed. **The Wizard will not tell you if objects failed to upload.**
- See below for notes on each object.



Object Level Details

We recommend running the object migrations in order, waiting for each object to finish. Certain objects require parent objects to be present.

Here's a video describing each object and some tips on running the migration: <https://screencast.com/t/dAd2qE0sfQF>

USERS

- Before migrating the users, make sure there are enough user licenses.
- The **Select a profile** drop-down list populates all the profiles with a **Salesforce** License type. The profile selected from this list will be assigned to all the users that migrated from Desk.
- All the migrated users will default to inactive in Salesforce.

GROUP MEMBERS

- **Groups** are migrated as **Queues** in Salesforce, per **Step 3**.
- This step will assign users to the proper **Queues**.

ACCOUNTS

- There are two options to select which data you would like to migrate:
 - **Migrate All Data:** This will migrate all your companies in Desk to Salesforce.
 - **Migrate Data Range:** This will migrate companies created after the entered timestamps in UTC.
- Under **Record Type**, select your desired record type. One called “SCMT” has been created for you.

CONTACTS

- There are two options to select which data you would like to migrate:
 - **Migrate All Data:** This will migrate all your customers in Desk to Salesforce.
 - **Migrate Data Range:** Here you can either select a created date, or a starting Desk customer ID. Timestamps are in UTC.
- Under **Record Type**, select your desired record type. One called “SCMT” has been created for you.

CASES

- There are two options to select which data you would like to migrate:
 - **Migrate All Data:** This will migrate all your cases in Desk to Salesforce.
 - **Migrate Data Range:** This will migrate cases created after the entered timestamps in UTC.
- Under **Record Type**, select your desired record type. One called “SCMT” has been created for you.

NOTES

- There are two options to select which data you would like to migrate:
 - **Migrate All Data:** This will migrate all your notes in Desk to Salesforce.

- **Migrate Data Range:** Here you can select a starting page from the Desk.com notes endpoint (/api/v2/notes).

INTERACTIONS

- There are two options to select which data you would like to migrate:
 - **Migrate All Data:** This will migrate all your interactions in Desk to Salesforce.
 - **Migrate Data Range:** Here you can select a starting interaction ID from the Desk.com interactions endpoint (/api/v2/interactions).

ATTACHMENTS

- All Desk case attachments will be migrated as **Attachments** on the **Case** object.

ARTICLES

- All Desk knowledge base articles will be migrated as **Articles** in Salesforce.

What's Not Available At This Point

1. Knowledge Base/Community Content:
 - a. Article category (Topic in Desk)
 - b. Article translations
 - c. Article attachments
 - d. Q&A community questions
 - e. Brands
2. Case Data:
 - a. Case History
 - b. Merge case data
 - c. Split case data
 - d. Linked case data
 - e. Customer Satisfaction (CSAT) score
3. Admin Settings:
 - a. Rules
 - b. Macros

- c. Filters/queues
- d. Dependent pick lists
- e. Portal user
- f. Snippets and translations
- g. Email Templates
- h. Support Center Themes
- i. Site Settings
- j. Social Personas
- k. User Roles

Service Cloud & Desk Gaps

We have created a **Desk.com to Salesforce Service Cloud Migration Considerations** document to outline the gaps between Desk.com and Salesforce in details. Click [here](#) for more details.

Frequently Asked Questions

Q: I can't see the migration wizard. Why is that?

A: The most likely explanation is that you have not deployed a custom domain to your org. If you installed the package before deploying your custom domain, try uninstalling the package and then reinstalling.

Q: What permissions do I need in Salesforce?

A: *You should have read/write access to all of the objects, fields and permission sets you are migrating. All of this is included in the SCMT Audit permission set. The migration tool can update a **clone** of this permission set to allow for all migrated custom fields, so please follow the instructions above.*

Q: What permissions do I need in Desk.com?

A: *You should be an Admin in Desk.com that has access to generate OAuth tokens. In the Desk.com admin panel, click the gear icon to go to **Settings**. On the left hand side there is a link for **API**. Generate a key and secret (callback URLs are not required). These will be your OAuth key and secret. There is a link that reveals your access key and secret. You need both pairs to use the migration app.*

Q: Why do my usernames have a string of numbers appended to the end?

A: *By default, a random string is appended to your usernames. Usernames cannot be reused in any production or sandbox. It's easier to generate a list or report of users after migration is complete and change the names than it is to partially migrate users and lose the migrated data.*

Q: What is installed in my org?

A: *The application installs custom apps, tabs, objects and custom fields. After migration is complete the installed metadata can be removed.*

Q: Why do migrated custom fields have “SCMT_Desk” as a prefix?

A: *Custom fields have this prefix in order to prevent any name collisions,. After migration is complete you can change the field name and label. If you plan on doing this, you should do so before referencing the fields in any Apex, Visualforce, or Workflows.*