

2026

THE 60 MIN MIGRATION * GUIDE

Zero to Live in 60 Minutes: The Frictionless
Path from Legacy Support to AI-First CX.



The Insight

Most teams stay with Zendesk not because they love the platform, but because of **Data Inertia**. The fear of losing years of Macros and Knowledge Base articles acts as a "golden handcuff." This guide is designed to break those cuffs. In 60 minutes, we move your most valuable assets without losing a single line of history.

The 10-Minute Knowledge Audit

Before moving, you must realize that migration is the best time for a Content Reset. Don't migrate your technical debt.

- The 80/20 Rule: Identify the 20% of Macros that handle 80% of your tickets.
- Audit Action: In Zendesk Guide, filter for articles that haven't been viewed in 6 months. Do not migrate them. Start your new chapter in ReplyCX with a lean, high-performing library that your AI can crawl more effectively.



The Execution Roadmap

This execution roadmap serves as a high-velocity technical blueprint, distilling the complexities of data transfer into a streamlined, three-step workflow that ensures your institutional knowledge is preserved and primed for a faster, AI-driven environment.

Step 1: The Zendesk Export (15 Mins)

- **Macros:** Navigate to Admin Center > Workspaces > Agent tools > Macros. Use the Zendesk API or a bulk CSV export tool to pull your macro titles, descriptions, and plain-text actions.
- **Articles (Help Center):** Go to Guide Admin. Use the Help Center API to pull JSON/HTML files of your articles.
- **Deep Insight:** Ensure you capture "Label" tags; these function as metadata that ReplyCX uses to categorize intent instantly.

Step 2: Data Sanitization (10 Mins)

ReplyCX thrives on clean data. Open your exported CSV:

- **Variable Mapping:** Replace Zendesk placeholders (e.g., `{{ticket.requester.first_name}}`) with ReplyCX variables. This prevents "broken" personalization on Day 1.
- **HTML Cleanup:** Strip any Zendesk-specific CSS classes to ensure your articles look native and clean in the ReplyCX interface.



Step 3: The ReplyCX Import (15 Mins)

- **Knowledge Base:** Upload your cleaned files into the ReplyCX Knowledge Module. Our engine will immediately begin indexing these for your AI agent.
- **Macro Bulk-Upload:** Import your CSV.
 - Pro Tip: Assign "Categories" during the import to mirror your Zendesk folders so your agents feel an immediate sense of familiarity.

The 10-Minute Safety Verification

- **The Link Check:** Run a quick scan for internal links that might still point to your old brand.zendesk.com domain.
- **The Intent Test:** Fire off three test tickets using your most complex Macros to ensure the logic and variables are rendering correctly in the new environment.

✦ The "White Glove" Alternative

We understand that even with a roadmap, your time is your most valuable asset. If you want to avoid the manual work, or if you simply prefer to have the experts handle the transition to ensure zero data loss:

Let us do the heavy lifting.

Simply reach out to us at contact@reply.cx. Our specialized migration team will contact you within the next 24 hours to take care of the entire migration process on your behalf - from data extraction to final verification.

Your history is safe. Your future is faster.



☀ Thank you!

Thank you for taking the first step toward a more efficient, AI-powered future—we look forward to helping your team shed the complexity of legacy systems and unlock the full speed of ReplyCX.

Contact Us:

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