

Plan your move to Shopify.

Check what must keep working, then test the handover before you switch.

Store / current platform

Migration owner / target date

Check an item only after it is verified. Use page 2 to record gaps and anything that does not apply.

01 Keep the business records that matter

- ☐ Save a dated source export and record product, variant, customer and order totals for comparison.
- ☐ Match products and variants to stable SKUs. Check images, options, prices, stock and important custom fields.
- ☐ Agree how customers access their accounts and how historical orders and refunds will be handled.
- ☐ Reconcile gift cards, store credits and loyalty balances. Record any limits and the customer-facing fallback.

02 Protect the way customers find and buy from you

- ☐ List important product, category and content URLs. Map each changed address to the right destination.
- ☐ Carry over useful page content and metadata. Check links, sitemap, search access and product information.
- ☐ Review Shopping feeds, ad links, tracking, email flows and customer consent records before switching them.
- ☐ Save a dated baseline of orders, revenue and search performance so post-launch changes can be investigated.

03 Plan the store and POS handover

- ☐ Name the owner of products, stock and customer records in each connected system. Agree the final update process.
- ☐ Check POS hardware, locations, permissions and staff workflows if you sell in person.
- ☐ Set the final data check, launch decision owner, support contact and fallback steps. Keep needed source access.

Search rankings can change during a move. These checks reduce avoidable disruption; they do not guarantee rankings or make every record transferable.

Test the handover.

Use real examples from your store in a controlled test. Record evidence, not assumptions.

04 Run the transactions your team will face

- ☐ Place a representative test order on mobile. Verify options, totals, payment, confirmation and stock movement.
- ☐ Test fulfillment, cancellation and a refund. Rehearse a return from the previous platform with your team.
- ☐ Test a gift card or credit where supported. If it cannot transfer directly, verify the agreed alternative.
- ☐ For POS, test a sale and return, receipt, customer lookup and inventory update at the correct location.
- ☐ Follow an order through shipping, ERP/CRM and reporting. Confirm how failed or duplicate updates are caught.
- ☐ After launch, check key redirects, feed status, live checkout and reporting against the saved baseline.

Test order / legacy return reference

Evidence location / person who verified it

05 Turn gaps into assigned work

Record the gaps. For anything that does not apply, write why.

Gap or failed test / next action

Owner / date to check again

Gap or failed test / next action

Owner / date to check again

06 Make the launch decision

Choose one outcome. An unchecked critical item means more work, not a passing score.

- ☐ Ready for the agreed switch: critical tests pass and staff know the fallback.
- ☐ Launch with a limited scope: exclusions and customer handling are agreed.
- ☐ Hold the switch: a payment, data, balance, stock or essential workflow issue remains.

First next step

Decision owner / review date

Keep this sheet with your data comparison, URL map and launch runbook. Recheck open items before retiring the previous system.