YOUR STORE WIZARDS

PLATFORM MIGRATION CHECKLIST

Our Platform Migration Checklist is designed to help ensure that each component that makes up your eCommerce store is considered, moved appropriately, and marked complete before finally changing DNS records to your new platform. We've broken down this checklist into different sections that should be completed in order. We encourage you to not move to the next section until all items in the previous one are complete.

DATA MIGRATION

The first step of your migration plan should be to get all your data from Platform A for Platform B. At minimum, we recommend downloading the items below. Once downloaded, your data should be validated for integrity and accuracy before importing into Platform B. Your Store Wizards can assist with data import / export if necessary.

- [ ] Products
- [ ] Sections / Categories
- [ ] Customers
- [ ] Orders
- [ ] Account Logins

- [ ] Product Reviews
- [ ] Coupon Codes
- [ ] Pricing
- [ ] _____
- [ ] _____

STATUS SUMMARY

Use this area to record notes, reminders, etc about the Data Migration process.

SEARCH VISIBILITY ITEMS

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The items in this section have a direct connection to your store's visibility in search engines. To make sure the SEO benefits pass from your old store to your new store, it's important these steps are completed.

☐ ## Create a master list of all site pages

This list can come from your sitemap, Google Webmaster Tools, or some other third-party tool. This step is used to create a working list of all pages of your website for reference.

☐ ## Create 301 Redirects

If your page URLs will be changing, it's imperative that you setup 301 redirects for all your pages. Start off by using the list of pages you created above and put in redirects for those that will need to be redirected. Many times these redirects can be completed within your new store's control panel. If they cannot, we recommend contacting your cart's support department for information on how to create them.

☐ ## robots.txt

Your robots.txt file contains information browsers use to display your website. Review this file on your new store and edit as necessary. For most store owners, there will be no need to edit this file unless you have specifically put in commands for search engines to not index your new site.

☐ ## Rel = Next/Prev & Rel = Canonical

If your site has category pages that extend beyond page 1, or have a "view all" option, these tags should be implemented on your new site. More information on these can be found here:

🔗 https://googlewebmastercentral.blogspot.com/2011/09/pagination-with-relnext-and-relprev.html

🔗 https://support.google.com/webmasters/answer/139066?hl=en

STATUS SUMMARY

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Use this area to record notes, reminders, etc about the Search Visibility items.

CUSTOMER COMMUNICATION

Communicating with your customers is important! You don't want to miss out on doing so because you forgot to setup an order confirmation, abandoned cart, or auto-responder series in your new store. Some of these items may be managed in the store while others are managed via a third-party. For third-party items, be sure to review those for any changes to URLs or processes.

- [ ] Order Confirmation Email
- [ ] Shipping Confirmation Email
- [ ] Order Followup Email
- [ ] Product Review Email
- [ ] Abandoned Cart AR
- [ ] Newsletter Template
- [ ] Order Cancellation Email
- [ ] Staff New Order Notification
- [ ] Drop Shipper Emails
- [ ] _____

- [ ] Contact Forms & CRM Integrations

Test any new contact forms on your site that you have have linked to any CRM system such as HelpScout, StoneEdge, etc.

STATUS SUMMARY

Use this area to record notes, reminders, etc about the Customer Communication checklist.

ORDER, PAYMENT, SHIPPING, MISC INTEGRATIONS

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The items on this checklist should be setup in the back-end of your new site in order to properly process orders. If you're using a third-party order management system, the connection should also be tested to ensure functionality.

☐ Shipping Methods & Rules

☐ Sales Tax Rules

☐ Payment Methods

☐ Payment Processing

☐ Real Time Order Links

☐ Real Time Inventory Links

☐ Email Marketing Connections

☐ Live Chat Integration

☐ Fraud Service Integration

☐ 3rd Party Search Applications

STATUS SUMMARY

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Use this area to record notes, reminders, etc about the Order, Payments, Shipping & Misc. Integrations checklist.

SEARCH ENGINE TOOLS

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Linking your new store to various search engine tools on the day you go live is important for data continuity.

☐ Google Analytics ☐ Ad Tracking Code

☐ Google Tag Manager ☐ CSE Data Feed Connection

☐ Google Search Console ☐ Misc. Tracking Scripts

☐ Bing Webmaster Tools ☐ _____

☐ Remarketing Code ☐ _____

STATUS SUMMARY

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Use this area to record notes, reminders, etc about the Search Engine Tools checklist.

SITE STRUCTURE

● ●

The items in this part of the checklist are considered important for easy site navigation, customer confidence, and compliance.

☐ ## Page: About Us

While this page should exist on your existing store, consider taking the time to update your "About Us" information for your new site bringing it current with company updates and where you're at "today."

☐ ## Page: Policies

Customer-friendly policies are important in today's competitive eCommerce landscape. Now is the time to review your order processing, shipping, and return policies to see if they're on par with your competitors and offer your customers a hassle-free experience.

☐ ## Page: Contact Us

Many eCommerce stores tend to bury any form of contact information on their site. While it may seems like a way to get around speaking with customers one-on-one, for many shoppers it's a deterrent to doing business. Make sure your contact information is easily located and up-to-date.

☐ ## Page: Privacy Policy and/or Terms of Service

Most eCommerce platforms require a Privacy Policy and/or Terms of Service and oftentimes provide a boilerplate version that is a one-size-fits-all solution. If you have a custom PP or TOS, review for accuracy and make sure it's current. If you are using a boilerplate version, make sure you review it, adjust as necessary, and include your contact information.

☐ ## Blog & Blog Comments

Blogs are still a great vehicle for expanding your SEO reach and giving current and potential customers a look into your business. They're also great for showcasing the fact that you are an expert in your field. If your blog will be moving with your store, be sure to export posts and comments so they can be imported. Your Store Wizards can help with data export/import if necessary.

☐ ## Navigation

Now is a great time to look at your store's navigation and make any adjustments to make it simpler. Experts recommend that shoppers should be able to get to your home page to a product page in no more than 2 to 3 clicks. If you navigation structure is too deep, all those extra clicks can hurt not only the user experience but may also cause issues with search engines crawling your store which will ultimately impact your SEO.

PRE-LAUNCH TESTING

It's almost time to go live! Before you do, here are some critical tests you should run to make sure everything functions as it should. If not, now is the time to adjust and re-test.

☐ ## Shopability

Invite family, friends, employees, or select customers to preview your new store, shop it, try all the features and report back to you on their experience. If they encounter issues, note which browser and OS they were using. Ask them to test from both desktop and mobile devices.

☐ ## Place Test Orders

Place test orders on your new site using actual credit cards to make sure your payment processor is working correctly. If you take additional forms of payment such as PayPal, test those methods as well. If your store uses user accounts, place test orders logging in as a user. You'll also want to make sure that users who are setup to receive special pricing are receiving the proper price.

☐ ## Verify Email

Make sure that emails are being triggered as they should for order confirmation, shipping notification, account registration, etc. Adjust the time these are triggered for testing purposes, but don't forget to reset to the proper time once confirmed.

STATUS SUMMARY

Use this area to record notes, reminders, etc about the Pre-Launch Testing checklist.

GO-LIVE

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The big moment is here! Before you switch your DNS records to your new site, complete these steps.

☐ **Import Latest Customer Data**

☐ **Import Latest Order Data**

☐ **Disable Cart on Old Store**

☐ **Update DNS Records**

☐ **Place Test Orders**

☐ **Verify All Redirects Entered**

☐ **Verify Redirects are Working**

☐ _____

☐ _____

☐ **Celebrate!**

STATUS SUMMARY

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Use this area to record notes, reminders, etc about the Go-Live checklist.

POST-LAUNCH REVIEW

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Now that your new store is up and running, it's time to do some cleanup. We recommend doing the items on this checklist ONLY after you're 100% comfortable with your new store and its performance.

☐	Review 404s and Fix	☐	Solicit Customer Feedback
☐	Add Any Missed Redirects	☐	Have a "New Site" Sale
☐	Cancel Your Old Cart	☐	
☐	Cancel 3rd Party Services	☐	
☐	Review Analytics for Issues	☐	

STATUS SUMMARY

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Use this area to record notes, reminders, etc about the Post-Launch Review checklist.

RECOMMENDED PARTNERS

Your Store Wizards has developed strategic partnerships with select companies that provide complimentary services to support our clients. From shopping cart platforms to 3rd party integrations for multi-state sales tax collection, our partners are chosen based on the value and solutions we feel our clients can benefit from.

TaxJar®

TaxJar makes the sales tax collection process simple and hassle free by automating sales tax collection, reporting, and filing. With continually evolving state sales tax laws, store owners can rest assured knowing they're compliant in regards to the collection of sales tax on Internet purchases.

Rewind

Rewind is the leading backup solution for BigCommerce, Shopify, WooCommerce, and QuickBooks Online. Businesses of all sizes rely on Rewind to back up their critical data and restore it painlessly due to a small error or major disaster.

accessiBe

accessiBe is a fully automated web accessibility technology that complies with WCAG 2.1 and keeps your website ADA and WCAG compliant at all times.

shogun

shogun is a drag-and-drop page editor and virtual CMS that seamlessly integrates into your BigCommerce or Shopify store. Easily build landing, product, and blog pages using its powerful editor that's perfect for AB testing.

BIGCOMMERCE   **shopify**   **YAHOO! SMALL BUSINESS**

Finally, Customizable Search That Won't Break the Bank

Search Magic is a complete eCommerce website search product and merchandising business solution designed with your pocket-book in mind.

SEARCH MAGIC

Over 44% of online shoppers start with a web search, and over 30% will end up using the search on your website. Providing the best results adds money to your bottom line.

Packed with Features

Powerful and flexible fully responsive website search solution. Spelling error correction, synonym suggestion and advanced search queries to name a few.

Designed to be Affordable

A great website search shouldn't cost a small fortune. Using the latest technology and the power of the Wizards, we've built a custom search you can afford.

Excellent Support

Search Magic is fully supported by the premier support team at Your Store Wizards.

In our client's words...

"After years of paying sky high prices for a robust search system, we switched to Search Magic. We love the operator friendly interface and ease of adding misspellings and slang. With over 65% of our customers using our search feature, it's critical for us to run a system that is not only easy for us, but easy for the customers to find what they want. We are getting the same positive results using this system compared to our old. Only difference is, we are saving a ton of money and Don and team take the time to hear our feedback and make improvements when necessary."

- Pam Macharola | BlairCandy.com

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