

Optimum7



eCommerce Platform Migration Checklist

E-COMMERCE MIGRATION CHECKLIST

If you are looking to migrate your e-commerce platform, this checklist will help you in planning, scope, execution and QA steps.

This Migration Checklist applies to platforms such as Shopify, Bigcommerce, Volusion, Magento, 3DCart, Miva, Woocommerce, Episerver, Oracle Netsuite, Demandware, Sitecore, Opencart, Zencart and more...

For more detailed information on migrations, click [here](#).
For a list of advanced e-commerce functionalities, click [here](#).
For an advanced migration planning, click [here](#).

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STEP 1: E-Commerce Platform Selection

Which features does your platform need?

1. Checkout Process and Flow



2. Internal CRM and Dynamic Product Management



3. Order Fulfillment and Integrations



4. Drop Shipping or Supplier Integration Options



5. Payment Integration and Logistics Options for International Buyers



6. Marketing Automation Options



7. 3rd Party Integration Capabilities



STEP 2: Migration Planning Checklist

General Store Configuration:

8. Store Details (Address, Phone, Shipping City, State etc.)



9. API Details and limitations



10. Server Details (Open source, Hosted etc.)



11. Supported countries and currencies



12. Languages and local settings



13. Time zone



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14. Shipping options and rates



15. Tax rules and rates



16. Payment gateways and PayPal



17. Custom eCommerce Functionalities or Extensions



18. Server and Nameserver Settings



19. SSL certificate



20. PCI compliance requirements



21. Up-time monitoring and alerts



22. Security and malware scanning



23. Data and content backup. Disaster recovery processes



24. ADA Compliance Requirements



STEP 3: Migration Planning - Product Catalog

Product Catalog Migration:

25. Map all standards and custom product attributes and options for import/ export process



26. Map old and new catalog category structures, validate special characters



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27. Related Products



28. Cross-Sell products



29. Up-Sell products



30. Price promotion rules



31. Per product tax group settings



32. Data feeds with POS inventory to other inventory systems



33. Data feeds to other market places (eBay, Amazon, etc.)



34. Check any product integrations



STEP 4: Migration Planning - Storefront

Storefront style and content:

35. Branding Guidelines – logo, fonts, colors, images and photos



36. Primary and secondary navigation, calls to action menus



37. Responsive theme design on mobile phones and tablets



38. Mega menu and Layout mockups and options



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39. Home page – Content and Slider



40. Main category pages



41. Subcategory pages



42. Product detail pages



43. Search results page



44. Shopping cart page: cross-sell options



45. Other non-product content pages



46. Digital assets (PDF, images, videos)



47. Links to external content (Videos, Blogs, Documents on third party sites)



48. Additional Sliders and banners



49. Generic and custom widgets functionality mapping



50. Product reviews module (if any)



51. Web Forms or JS Files for Tracking



STEP 5: Migration Planning - Checkout

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Checkout Process:

52. Checkout Customization and Options (Guest Checkout, One Page etc.)



53. Shipping options



54. Payment options



55. Shipping rules



56. Order and account related transactional emails



57. Checkout Authority Elements



STEP 6: Migration Planning - Data

Orders data migration, validation and data QA:

58. Customer accounts



59. Orders



60. Mapping Customer Accounts to Order Details



61. Gift Card Details



62. Mapping Order Details to Product Details *



63. Validating all Customer and Order Details *



STEP 7: Migration Planning - Policy Pages

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Informational and Policy pages:

64. Privacy policy



65. Terms of service policy



66. Return and refund policy



67. Customer service links



68. ADA Compliance Policy



69. GDPR Policy



STEP 8: Migration Planning - Integration

Third party sites and services Integration:

70. Shipping Integrations (UPS, Fedex, DHL and any custom logistics options)



71. E-mail marketing providers, Marketing Automation Platforms



72. Amazon, Ebay, Walmart, Jet, and other marketplace integration



73. Google Merchant Center data feeds



74. Google Shopping Campaigns with Google Ads



75. WordPress or Blog Integration



76. Supplier, POS, Inventory Management Systems



77. International Entity Integrations



78. Facebook Catalog Re-import and Setup



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STEP 9: QA and Testing

This is the most important step!

79. All Field Validations (Products, Categories, Descriptions)



80. All Order and Customer Details Validations



81. Server Load Testing and Page Speed Testing



82. Custom Functionality / Usability and Engagement Testing (Conversion Rates)



83. Business Analyst to review all product, order, integration, user journey flows



Domain, URL and metadata:

84. Permanent URL mapping and 301 redirects



85. Search engine crawler settings - Robots.txt file



86. Keywords research and optimization



87. Google Search Console Integration



88. Rich snippets



STEP 10: Migration Planning - Social Media

Social media content and integration:

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89. Facebook (Pixels and Conversions Setup)



90. Twitter



91. Pinterest



92. Instagram (Catalog)



93. LinkedIn (most for B2B stores)



Data and reporting business rules:

94. Sales reports



95. Customer reports



96. Shopping Cart Flow



97. Product Reports



98. Web analytics reports



99. Campaign reports



STEP12: Migration Planning / Customer Communication

Customer communication and proactive customer care:

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100. Email and online communication



101. Customer service training





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