

E-Commerce Store Migration Checklist

Step 1 Set the Date for the Big Migration:

Date of Completion	Task
--/--/--	Find optimal time for site down needed for migration.
--/--/--	Inform the client of the risk mitigation efforts you will put in place to prevent any issues. (You can share this checklist)
--/--/--	Inform the client that you might need their help reconnecting integrations.
--/--/--	Create a plan for Quality Assurance before, during and after the migration. Ideally this would be performed by a third party especially the third step.

Step 2 Maintenance and Security Scans

Date of Completion	Task
--/--/--	Perform plugin, theme and core updates and test functionality
--/--/--	Run a security scan
--/--/--	Address any issues

Step 3 Create Multiple Backups

Date of Completion	Task
--/--/--	Commit all changes and push to a remote GIT repository
--/--/--	Create full code and database backups upload them to the new server
--/--/--	Create a full migration plugin backup

Step 4 Spin up a Clone of the Site in the New Server and Run Preliminary Tests

Date of Completion	Task
__/__/__	Spin up the clone site.
__/__/__	Adjust database table prefixes if needed.
__/__/__	Review PHP version and settings and adjust if needed.
__/__/__	Port over any server side cron jobs.
__/__/__	QA - Test performance and functionality on the new server
__/__/__	IF YOU HAVE TO MAKE ANY CHANGES TO DATABASE SETTINGS WRITE THOSE CHANGES DOWN

Step 5 Go Time - Set the Old Site to Maintenance Mode to Stop the Checkout Process

Date of Completion	Task
__/__/__	Put the old server's site in maintenance mode to stop transactions

Step 6 Sync up the New Site's Database

Date of Completion	Task
__/__/__	Sync the database with the most current status of the old server's site's database
__/__/__	Clear all cache, including CDN, Wordpress and Database (Memcached or Redis)
__/__/__	Check the database for any incorrect urls or emails. Perform search and replace to ensure urls and emails are correct.

Step 7 Check Users, Orders, Products, Checkout Process, All Website Pages, Broken Links and then Go Live

Date of

Completion

Task

Check Users

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- Do you have the same number of users?
- Do they have the same id's (You can check this in the wp_users table in the new database)
- If you go to an order (Woocommerce > Orders) that is assigned to a user (not guest) click on "View other Orders" to check if the other orders indeed belong to this user. Check a few users.

Check Orders

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- Do you have the same amount of orders as the current site?
- Are the orders assigned to the same users?
- Run a transaction. Does it go through? Do the order numbers increase sequentially as you'd expect?
- Are the test orders showing up in the payment processing service?

Products

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- Do all the products appear as expected?
- Are the inventory of the products being adjusted?
- If there is an inventory management software is that also being synced? (This might need to be tested after the DNS changes have been made)

Checkout Process

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- Can you purchase a product with each of the available processing options?
- Is the error handling working as expected?

Check all pages

Tip: Open a new incognito browser window, go to the home page and control click on all the pages of the site to open them in different tabs.

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- Check all the pages and make sure nothing is broken.

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- Check mobile, tablet and desktop

Check for broken urls

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- Leverage an SEO tool like Screaming Frog SEO Spider to crawl through your site's links and search for broken urls and to test for links that point to old urls:

<https://www.screamingfrog.co.uk/seo-spider/>

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- Some plugins like WP Bakery will store link urls with escape symbols that might be missed by a search and replace operation, so checking with a tool like SEO Spider can really save you some grief.

Check Contact and Newsletter Signup Forms

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- Can you fill them out?
- Do the entries get stored?
- Do the automated emails go out and arrive as expected?

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When ready change DNS records as needed for A, SPF and CNAME records.

Step 8 Check Integrations

Date of

Completion

Task

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Check Google Analytics is tracking data.

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Check that the robots.txt file is allowing crawling on the live site and NOT on the staging site. This is very important for SEO.

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Check Google Search Console is indexing as expected.

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Check SMTP email service.

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Check Newsletter Integrations. (like Mailchimp)

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Check Other/API services (like inventory management, fulfillment services)

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Check that all other related domains, if they exist, and redirecting to the new server as expected.

--/--/-- Check contact forms and any connected CRMs (like Hubspot f.e.)

--/--/-- Check that emails with your sites domain haven't been incorrectly migrated to use a subdomain instead of the actual domain of the site. (@stage.example.com instead of @example.com)

Step 9 Check Again 24-48 Hours Later

**Date of
Completion**

Task

--/--/-- RE-CHECK Users, orders, products, checkout process, all website pages, broken links and other critical functionality.

--/--/-- RE-CHECK Integrations

--/--/-- Check site performance in Google Page Speed and bounce rate changes in Google Analytics.

Final Thoughts

**Date of
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Task

--/--/-- Have a frosty beverage with your team!