

# ECOMMERCE MIGRATION CHECKLIST

## How to Change Ecommerce Platforms

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As you prepare for your site migration, there is a lot to think about. We've provided a list to help ensure that you don't miss any important items, or make mistakes we've seen happen to others. At Brilliance Business Solutions, we often work with businesses that are migrating from older, custom-built systems to new platforms. There can be a lot of complexity and data to be managed, and we put a priority on making site migrations go smoothly.

This is a checklist of steps that our team uses to help our clients successfully navigate this process.

### Checklist of Migration Tasks

#### Planning

*It's important to know what you have with your current site and get clarity about what you want from your new site.*

- ✓ Document the functionality you want to carry over from your current site to your new site
- ✓ Talk to the people who work with the site about how they use the system and what types of things they will need.
  - ✓ Customer service
  - ✓ Marketing
  - ✓ IT
  - ✓ Operations/Fulfillment
  - ✓ Other

#### Integrations with other systems API

*There are usually multiple systems involved in the Ecommerce process, and you will need to make sure they will all work together on the new platform.*

- ✓ Define what integrations will come over from the current system
- ✓ List any new integrations that are being added
- ✓ Note the specific data points that are handled through integrations
- ✓ Determine whether the new system has a pre-built integration with the other systems you have
  - ✓ If not, create a development plan to create needed integrations.

#### Data

There can be a lot of data in your system, both for the products as well as the customers. Is it critical to transfer everything as is, or is there an opportunity to improve your data through this process?

- ✓ Determine exactly what data is being transferred
- ✓ If you plan to automate the data transfer, create integration scripts for automatic data transfer
- ✓ For manual data transfer, allocate resources to enter the data
- ✓ Prepare e-mail to send to your customer base to inform them about the new site and that their password has been reset.

#### Promotions

*Promotions are handled differently from system to system, and may need to be adjusted during the migration.*

- ✓ Document what types of promotions you would like to have
- ✓ Determine whether the functionality of the new system supports that

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## Mobile

*Becoming mobile-friendly is often a result of a migration. It can impact the way things are displayed and maintained.*

- ✔ Start the design process with wireframes that sketch out how content is displayed on mobile vs. desktop devices
- ✔ Develop your site design on the new system using responsive design techniques

## Performance

*A migration can impact areas that affect your site performance, so it's important to be prepared.*

- ✔ Check Google Analytics for the number of visitors coming to your site each month.
- ✔ Share traffic statistics with your hosting provider to ensure your site will have a fast response time.

## Hosting

*There are some technical things to be aware of during a migration, whether you are changing hosts or just shifting your current hosting.*

- ✔ Communicate with your DNS host about the change so they are prepared.
- ✔ Set your TTL Value on your site DNS to a low number (i.e. 600 = 10 minutes) to enable you to quickly change the server that your domain is pointing to in order to avoid a propagation delay.
- ✔ Talk to your hosting provider about making sure the SSL Certificate is set up prior to launch

## Security

Migrating your site to a newer platform often means moving to a higher level of security, which can cause things to be done differently, particularly around credit card information.

- ✔ Ensure you are working with a PCI compliant host
- ✔ Make sure the new system is PA-DSS Certified
- ✔ Never store credit card numbers in full anywhere on your systems, use third party data centers designed for this
- ✔ Review the self-assessment questionnaire (SAQ) from the PCI Security Standards Council to ensure you will meet the guidelines for PCI compliance.

[https://www.pcisecuritystandards.org/document\\_library?category=saqs#results](https://www.pcisecuritystandards.org/document_library?category=saqs#results)

## Testing

*Making sure your site is ready to go before you launch can save a lot of headaches.*

- ✔ Determine which browsers, screen sizes and devices will be used for testing
- ✔ Develop a written test plan, including...
  - New customer registration
  - Existing customer login
  - Placing an order (single item, multiple items)
  - Customer service functions
  - Other
- ✔ Implement test plan prior to launch and again after the site is live

## Mock Go Live

*Practicing your launch is an excellent way to make sure everything is working as you expect before you actually go public.*

- ✔ Pick a date to have the development team to do a soft launch of the site for your internal team (and potentially a few key customers) to review

## Launch

*This is it! You are ready to go live with your new site.*

- ✔ Determine the date and time for the launch
- ✔ Ensure that customer service and technical teams are available during launch for testing, answering questions, etc...
- ✔ Prepare a maintenance message that will appear on the website during the launch