Checklist After Migration

## **Check, Verify Data After Migration**

* Verify that products, collections, orders, customers, and other data have been correctly imported with all information. Export invalid records.
* ▶︎ Modify order prefixes to ensure that new orders after migration are different from the imported old orders
* ▶︎ Check product inventory status to ensure that products can be sold normally after migration. Check inventory locations and remove default locations if they have been migrated to avoid inventory synchronisation issues
* ▶︎ Check the effectiveness of discounts (test orders)
* ▶︎ Check notification templates such as "Customer Activation Template" and "Abandoned Cart Recovery Template"
* ▶︎ Check payment channels (test orders)
* Visual Decoration (PC and Mobile)
* Ensure that the customer registration process is functioning properly
* Check the alignment and proper functioning of the landing page URLs for various advertising channels
* Check Feed data: Create an Facebook (Meta) feed for "Smart Feed" (Google Feed requires binding to Google Merchant Center account, which can be quickly checked after domain switching)

For instructions on using Smart Feed to create a Google Feed, refer to [How to Use Smart Feed to Create Google Feed](https://help.shopline.com/hc/en-001/articles/11292275975577-How-to-Create-a-Google-Feed-Using-Smart-Feed)

## **Store Configuration**

* Store location time zone, language, and checkout currency (ensure consistency with the old site currency)
* Logistics
* Payment collection
* Associate warehouse locations with the backend
* Customer service email
* Abandoned cart email: Frequency, timing, style (Settings - Notifications - Abandoned Cart Recovery or Smartpush)
* Customer activation (Settings - Notifications - Customer Invitation: Account Activation Notification)
* Supplement checkout page information
* Website promotions and discounts: automatic discounts/discount codes/free gift/product bundles, etc.
* ◎Taxes
* ◎Enable PayPal Express Checkout
* ◎Enable customer registration and login with mobile phone number: Settings - Customer Login - Registration/Login Methods

## **Store Decoration**

* Homepage decoration: menu, footer
* Product template page decoration
* Check collection pages and product sorting
* Create landing pages for advertisements and check their sorting
* Check custom pages (themes with embedded Order Tracking, Contact form templates)
* Optimize website product-related matters: "Product Recommendations"
* ◎Optimize average order value: Tips/"Shipping Insurance"
* ◎Install applications required for marketing such as POD (Product Customization)
* ◎"Smart Push" EDM tool

## **Other Settings**

* Product reviews: Install the "Product Review" application and migrate product review data
* Special pages (pages generated by applications, such as affiliate registration pages, event landing pages, etc)
* Main site discount code settings
* Influencer discount codes: Install the “Affiliate Marketing System” application and import affiliates and set up discount rules
* ◎Metafields: Metafield definitions need to be set in the Admin backend.
* ◎Top links: Install the “Product Pin” application

##

## **Connect to ERP**

* Link the new store to the ERP platform: No need to disconnect, ERP can be linked to both platforms simultaneously
* Pending orders that have been migrated: How to fulfill pending orders that have been migrated to Shopline?

Option 1: After linking ERP to Shopline, fulfill the order and the tracking number can be passed back to the order. Customers can see the order in their personal center.

Option 2: Fulfill the order in the original Platform’s ERP (for example, Shopify’s ERP). Shopify will continue to notify the customer, but when the customer visits the domain and logs into the personal center, they will not see the order.

* Newly added pending orders during the migration: Handle order fulfillment in the original ERP.

## **Member Activation**

* Optimize customer activation emails: Settings - Notifications - Customer Invitation
* Send registration invitations to customers: Customers - Check "To be invited" - Use segmentation
* ◎Install the "Member System" application

## **SEO Check**

* ◎Check if the redirect URL is correctly redirecting
* ◎Broken link-404 page check: Install the "Easy Rank" plugin to detect broken links and configure 404 link redirection
* ◎Resubmit Sitemap in GSC

**Advertisement and Domain Migration**

## **Advertisement and domain migration (Key steps! Completion within one hour!)**

* [Google Merchant Center] Install the "Smart Feed" plugin (synchronizing product data takes 10-60 minutes)
* [Google Merchant Center] Temporarily pause advertisements/reduce budget
* [Google Merchant Center] Disconnect Google Merchant Center from the original site
* ▶︎ Domain resolution to the Shopline store
* [Google Merchant Center] Bind Google Merchant Center account with Shopline store in "Smart Feed"
* [Google Merchant Center] Create a Google Feed in "Smart Feed," match the rules of the original feed data, and submit data reporting
* [Facebook (Meta)] Create a Facebook (Meta) Feed for synchronizing products in "Smart Feed" (category ads can be re-launched after 72 hours if the matching rate reaches 95%)
* [Facebook (Meta)] Disconnect Pixel from the original site
* Restart/resume advertising campaigns

## **Bind advertising codes**

* Binding Facebook (Meta) Pixel and domain verification ([Binding Facebook pixel/multi-platform pixel installation assistant](https://help.shopline.com/hc/en-001/articles/900005804243-Facebook-Pixel-Setting))
* Binding Google Ads ([Google Ads conversion code/Google Enhanced Conversion](https://help.shopline.com/hc/en-001/articles/6178314139801-Google-Ads-Enhanced-Conversion-Manual-Setup-Guide))
* Configure GA, GTM, and other tracking codes ([Google Analytics Setup](https://help.shopline.com/hc/en-001/articles/900004853886-Google-Analytics-Setup) / [Google Tag Manager (GTM) Installation Method](https://help.shopline.com/hc/en-001/articles/900007033563-Google-Tag-Manager-GTM-Installation-Method))