Shopify Checkout conversion checklist

TASK	CHECK WHEN COMPLETE
Fill out the **request to convert form**	☐
Complete store assessment with conversion team	☐
Action necessary updates identified by the conversion team	☐
Conversion team performs storefront conversion	☐
Existing subscriber migration (optional)	☐
Successful conversion notification received	☐
Complete the **post conversion checklist**	☐

Post conversion checklist

TASK	CHECK WHEN COMPLETE
Complete a **test subscription transaction**	☐
Confirm the subscription widget looks and behaves as expected: • If you have any custom CSS or JS, ensure it is updated to work with the new subscription widget. • If you have AJAX widget customizations, ensure they are updated to fit subscription selling plans used by the Shopify Checkout Integration. Refer to **Adding an item to the cart with Ajax** for more information.	☐
Confirm the appropriate shipping & taxes are charged at checkout	☐
Review the customer portal experience to ensure it looks and behaves as expected	☐
Update a test customer's payment or billing information in the customer portal to view the new Shopify email update flow	☐

Prior to canceling the test order, **process the first recurring order associated with the test transaction** to confirm the recurring orders behave as expected.	☐
Cancel and **refund** the test order if applicable	☐
Review **Understanding customer management on the Shopify Checkout Integration and Migrated Shopify Checkout Integration** for more information on the customer management process post-conversion.	☐
Update any relevant internal and external documentation related to subscriptions (FAQ pages, landing pages, customer service guides) to reflect new processes such as performing refunds and updating billing information.	☐
Confirm any third-party apps are configured to function with the Shopify Checkout and connect with the respective app's support team to confirm settings are adjusted as required.	☐
Closely monitor new orders including new checkout orders and existing recurring subscription orders. Follow the order from the charge processing and order creation all the way to fulfillment to ensure it behaves as expected.	☐