

Existing customer migration checklist

TASK	CHECK WHEN COMPLETE
Contact the conversion team to begin the existing customer migration process	<input type="checkbox"/>
Conversion team provides a link for the merchant to enable their legacy payment gateway in Shopify	<input type="checkbox"/>
Confirmation of the start of the existing customer migration received	<input type="checkbox"/>
Confirmation of the completion of the existing customer migration received	<input type="checkbox"/>
Complete the post migration checklist	<input type="checkbox"/>

Post migration checklist

TASK	CHECK WHEN COMPLETE
Complete a test subscription transaction	<input type="checkbox"/>
Confirm the subscription widget looks and behaves as expected: <ul style="list-style-type: none">• 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.	<input type="checkbox"/>
Confirm the appropriate shipping & taxes are charged at checkout	<input type="checkbox"/>
Review the customer portal experience to ensure it looks and behaves as expected	<input type="checkbox"/>
Update a test customer's payment or billing information in the customer portal to view the new Shopify email update flow	<input type="checkbox"/>

<p>Prior to canceling the test order, <u>process the first recurring order associated with the test transaction</u> to confirm the recurring orders behave as expected.</p>	<input type="checkbox"/>
<p>Cancel and refund the test order if applicable</p>	<input type="checkbox"/>
<p>Review <u>Understanding customer management on the Shopify Checkout Integration and Migrated Shopify Checkout Integration</u> for more information on the customer management process post-conversion.</p>	<input type="checkbox"/>
<p>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.</p>	<input type="checkbox"/>
<p>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.</p>	<input type="checkbox"/>
<p>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.</p>	<input type="checkbox"/>