Migrate WooCommerce Orders Checklist

This checklist is the accompanying document to our WooCommerce customers and orders migration guide. We encourage you to print a copy of this and check things off as you go through your migration. Haven't read the guide yet? [Read it here](.).

Required Plugins

- ❏ [Customer / Order CSV Export Suite](.) plugin
- ❏ [Customer / Order CSV Import Suite](.) plugin

Pre-Migration

- ❏ Site A: WooCommerce Staging
- ❏ Site B: WooCommerce Live
- ❏ Migrate Products from Site A to Site B

1. Export Customers from Site A

- ❏ Upload and activate the [Customer / Order CSV Export Suite](.) plugin
- ❏ Next, on your WordPress dashboard, hover over WooCommerce and click "CSV Export".
- ❏ Then, go to Settings, toggle Customers, and select the dropdown to CSV Import and click "Save Settings". Manual Export Settings:
  - ❏ Format: CSV Import
  - ❏ Automatically Export Orders: Disabled
- ❏ Download CSV File
- ❏ Reformat/Check CSV File

- ❏ The first 3 columns should be: username, email, and password
  - ❏ Pro tip: If the first 3 columns are not username, email, and password, you did something wrong
- ❏ Remove Guest Customer Rows (Rows without usernames + password columns)

2. Import Customers from Site A to Site B

- ❏ Upload and activate the [Customer / Order CSV Import Suite](#) plugin
- ❏ Upload CSV File
- ❏ Import Options > Next, upload your Orders CSV file, click "Next" and configure the options
  - ❏ Shipping Address
  - ❏ Don't hash user passwords
  - ❏ Send emails
  - ❏ Merge/update
  - ❏ Debug Mode
  - ❏ Fields separated by: comma
- ❏ Run a dry run first
- ❏ Run a live import
  - ❏ Pro Tip: Import a CSV file with single *customer* first, and then if that is successful, go back and import a CSV file with all all *customers*

Pre-Migration of Orders

- ❏ Take a backup of Site B (optional)
- ❏ 'Activate' [Disabled Emails plugin](#) on Site B (optional)

- ❏ 'Activate' [Sequential Orders Numbers plugin](#) on Site A (optional)

- ❏ 'Activate' [Sequential Orders Numbers plugin](#) on Site B (optional)

- ❏ Before exporting your orders from Site A, ensure that the SKUs on each product (and product variation if any) on Site A match the products on Site B

3. Export Orders from Site A

- ❏ Upload and activate the [Customer / Order CSV Export Suite](#) plugin (this should already have been done in step 1 above)

- ❏ On Site A, in your WordPress dashboard, hover over WooCommerce and click "CSV Export".

- ❏ Next, go to the Settings tab, toggle Orders, and select the dropdown to "CSV Import" and click "Save Settings". Manual Export Settings:
    - ❏ Format: CSV Import
    - ❏ Add Order Notes: Enable
    - ❏ Automatically Export Orders: Disabled

- ❏ Then, click the "Export" tab, ensure the export is toggled to Orders and click the Export button. Manual Export Options:
    - ❏ Export type: Orders
    - ❏ Output type: CSV
    - ❏ Format: CSV Import

- ❏ Download CSV File

- ❏ Reformat/Check CSV File
    - ❏ Product skus on Site A match product skus (and product variation if any) on Site B

- ❏ Example: SP010 > SP010
- ❏ Pro Tip: If your product SKUs have changed and want to import products with an updated SKU, open up your Orders CSV file, and run a search and replace on the product SKUs that have been updated before importing your orders
- ❏ For multi product/items orders, separate the line items in the "line_items" column
- ❏ Delete "order_id" column (optional)

4. Import Orders from Site A to Site B

- ❏ Upload and activate the [Customer / Order CSV Import Suite](#) plugin (this should already have been done in step 2 above)
- ❏ WordPress Dashboard > WooCommerce > CSV Import Suite, click "CSV Import Suite" > click "Import Orders"
- ❏ Import Options > Next, upload your Orders CSV file, click "Next" and configure the options:
    - ❏ Allow unknown products
    - ❏ Re-calculate taxes & totals
    - ❏ Use addresses from customer profile
    - ❏ Send emails
    - ❏ Merge/update
    - ❏ Debug Mode
    - ❏ Fields separated by: comma
- ❏ Map Fields > Make sure your Orders CSV file is mapped properly.

❏ The first 3 columns imported should be:

- ❏ ~~Id~~ **> --skip--**

    ❏ Pro Tip: *Even if you're not merging orders, **skip** the first column "id" in the file mapping.*

- ❏ Order_number > Order number

- ❏ Order_number_formatted > Formatted order number

- ❏ Created_at > Date

❏ Run a dry run first

❏ Run a live import

- ❏ Pro Tip: Import a CSV file with single *order* first, and then if that is successful, go back and import a CSV file with all all *orders*

Post-Migration of Orders to Site B

❏ Create a list of any orders that occurred on your WooCommerce store during the migration process

❏ 'Deactivate' Disabled Emails Plugin

- ❏ If orders happened during migration, resend order confirmation emails to customer