

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 *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