Migration Checklist

These tasks are executed when we get a go-head from the merchant to start the migration process from their previous app to Loop.

All of this is handled by our internal team of experts. All communications are done in advance and on email for full transparency.

DIVIDED INTO THREE PHASES   **1** — **2** — **3**

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1 Tasks on Loop app

☐ **Disable 3rd-party app integrations**
Temporarily disable third-party app integrations (unless we have received explicit confirmation from your side that no critical workflows are running). Eliminates risk during migration process.

☐ **Disable customer account activation email**
Exceptions apply, especially when migrating from non-Shopify platforms, or if the merchant has specific requirements.

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2 Tasks on previous subscriptions app

☐ **Disable notification settings**
Ensure that all notifications are turned off on the previous platform to prevent any unnecessary notifications during the migration process.

☐ **Disable customer portal actions**
Ensure that all customer portal actions are disabled on the previous platform to prevent any unintentional customer interactions while the migration is underway and maintain sanity of the data exported for migration.

☐ **Unpublish widget of the previous app**
We do this to ensure that duplicate widgets don't appear on the product page.

☐ **Disable 3rd party integrations (e.g. Klaviyo & others)**
Check if any notifications or integrations with 3rd party apps are still active. Disable them to prevent potential conflicts.

☐ **API and feature availability (shared by merchant)**
Merchants have to share the access of all relevant APIs and features with Loop migration team.

The migration team requires a formal go-ahead to perform cancellation action and avoid double charging the customer

- Loop team will establish a clear timeline for uninstallation after coordination with the merchant.

- If uninstallation is not feasible, Loop team will explore alternative measures in consultation with the merchant.

☐ **Check for discrepancies in data exported**
Understanding the type of data and its expected format, and then comparing the exported data against merchant expectations to identify any inconsistencies or errors.

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③ Payment Service Providers (PSPs) migration
(Applicable to Legacy platforms only)

☐ **Legacy PSP APIs (Access shared by merchant)**
Loop migration team requires access to relevant PSP APIs and login credentials to retrieve payment card tokens and other payment information from the merchant's PSP.

☐ **PSP Account Verification**
Confirm whether the same PSP account that was connected to the old platform is still connected as a secondary provider to the merchant's store. Ensure consistency in PSP account connections.

☐ **Payment Token Verification**

Verify the presence of payment tokens within the connected PSP by querying the PSP directly. Additionally, confirm that payment tokens are being imported into the Shopify vault as expected to maintain payment functionality.

☐ **PSP-to-PSP Migration (if applicable)**

When a PSP-to-PSP migration is involved, Loop initiates the migration process only after receiving confirmation from both the PSP and the merchant regarding the successful transfer of tokens. This step ensures that payment and subscription data migration proceeds smoothly.

Following this comprehensive pre-migration checklist, we have eliminated disruptions, mitigated risks, and ensured **a successful migration of 350+ brands.**