ReCharge

Migration Guide

Ensuring a smooth transition for you and your customers

What is migrating?

Migration is defined as moving your customers from one ecommerce platform to Shopify with ReCharge. Products, design, colors, and other store elements will need to be transferred separately. Our team is on standby ready to assist in your migration.

An overview of the migration process

If you are contemplating moving to ReCharge, consider the following questions so we can cater to your needs more efficiently.

- Do you already offer subscriptions?

- What ecommerce platform are you currently using for subscription products?

- What payment processor are you using now?

- What payment processor will you use on ReCharge?

- How many active subscribers do you currently have?

- How many products do you offer as subscriptions?

1. First things first

Before migrating any clients over, you'll want to download the ReCharge app on your live Shopify storefront so new subscribers can sign up while the migration is happening. After your launch, export all subscriber data, including payment data, and copy it into the migration template located here.

2. Get your migration scheduled

Your launch manager will assign a date for the migration to take place. Prior to that, your team will need to prepare the migration CSV file so we can bring your subscribers over. A dedicated migration specialist will help answer any questions about the migration spreadsheet/process and the whole process can usually be completed within 5 business days.

3. Verification

After the import is complete, we'll have you verify the data. Once the data has been verified, we'll start processing orders using the date provided on the template. It is important to cancel the imported customers on your old platform before this date to prevent double charging. For a detailed description of the migration process, see our knowledge base here.

What payment processors does ReCharge accept?

ReCharge currently accepts with Stripe, Braintree (PayPal), or Authorize.net.

If you are currently using Stripe or Braintree, all you need to do is map the customer IDs to the correct customer in our migration template. If you are currently using Authorize.net, you'll need to add two additional columns to the migration template using data exported from Authorize.net.

If you are using a different payment processor, the best course of action would be to contact that payment processor directly and ask if they can transfer data. If they are unable to transfer payment data, each customer will have to re-enter a credit card using a ReCharge supported payment processor.

For more information on the difference between payment processors, read more here.

Migrating from Magento, WooCommerce, or Cratejoy?

Magento migrations are quite simple. Fill out the migration template and we can import all your data. Magento has no restrictions on migrating away from their platform.

WooCommerce migrations are relatively simple with one additional step involving the WooCommerce API. Because WooCommerce doesn't currently have a way to export all of the active subscription data, you will need to export the customer data. This will not include the product information, charge frequency, or next charge dates. For that reason, ReCharge has developed an exporter tool that works with the WooCommerce API. You should install the WooCommerce API plugin on your existing store and generate an API key. Once we have it, we'll run the export and send you the raw data file which can be used to fill out the migration template.

Cratejoy migrations are unique as they restrict the release of data. Here are two questions to think about:

What percentage of subscribers were won through the Marketplace?

Cratejoy will not transfer payment data for Marketplace subscribers. These subscribers will need to re-enter a credit card in Recharge.

What percentage of subscribers pay through PayPal?

Cratejoy is restricted by PayPal and isn't allowed to transfer PayPal payment data. Customers accounts will be transferred but they will need to re-enter payment information.

If a large amount of your customers are on the marketplace then moving them may not be the best fit. Forcing customers to either create an account or re-enter their payment information may cause churn. However, if you can accept these limitations on migrating, simply fill out the migration template and we can get your business up and running with ReCharge.

Migration timeline

Pre-migration

- ✔ Export customer list from existing ecommerce platform
- ✔ Verify exported data from all systems
- ✔ Create Shopify store & download ReCharge
- ✔ Prepare payment processor for store using ReCharge

Day 3

- ✔ Migration takes place

Post-migration

- ✔ Use Shopify Invite feature to have customers create password
- ✔ ReCharge does not send out any migration specific notifications
- ✔ Each post-migration is unique, merchants can determine how they want to communicate with their subscribers on their own

Pre-migration ···· **Day 1 & 2** ···· **Day 3** ···· **Day 4 & 5** ···· **Post-migration**

Day 1 & 2

- ✔ New customers now using ReCharge
- ✔ Export payment processor data
- ✔ Enter data into migration template
- ✔ Pre-migration questions answered

Day 4 & 5

- ✔ Verify imported data
- ✔ Sign off on processing customers through ReCharge
- ✔ Begin processing using date entered in migration template
- ✔ Cancel customers on old system

Common migration errors

Once the migration template has been filled out and the import is ready, we can schedule a time for the import. Here are some possible errors that we may encounter during the import process, all of which can be prevented by ensuring your data is valid. The following items *will halt* the import and cause errors.

✖ **Invalid email address:** Shopify validates email addresses, if it doesn't exist they won't be added.

✖ **Invalid/missing province or zip code in shipping address:** Shopify validates zip codes and provinces, if it is wrong they won't be added.

✖ **Stripe/Braintree token doesn't exist:** This happens when you import customers on a different Stripe/Braintree account than what is attached to ReCharge. Make sure the payment processor you're using in ReCharge includes the imported customers.

✖ **Shopify Variant ID doesn't exist:** This happens when you use the wrong variant ID or when you haven't added the product to ReCharge. Make sure all products are imported and accurate.

The following items *will not halt* the import. Data can still be imported but fixes need to be manually made once the migration is complete:

⚠ **Wrong quantity or recurring price:** The recurring price should not include quantity, taxes, or shipping. You may need to calculate the subscribe and save discount, if it applies.

⚠ **Wrong charge date:** All charge dates should be in the future to prevent double billing by your old system.

We will continue to work with you until all data issues are resolved.

Migration support hours

We will always aim to respond to your messages within 12 hours, if not sooner! Our support hours are Monday through Friday, 7am to 5pm Pacific Standard Time. If your email is sent outside those hours, you'll receive a response when our team gets back into the office. Our support hours are based on time zones in the United States, if you are inquiring from a different country, please be patient for our response.

Ready to migrate?

Send an email to support@rechargeapps.com and we'll be happy to help!

ReCharge

www.rechargepayments.com