indition™

INDITION COMMERCE

Data Migration and Import

User Manual — bringing your customers, products, orders and repair history across from Shopify and more∗, step by step.

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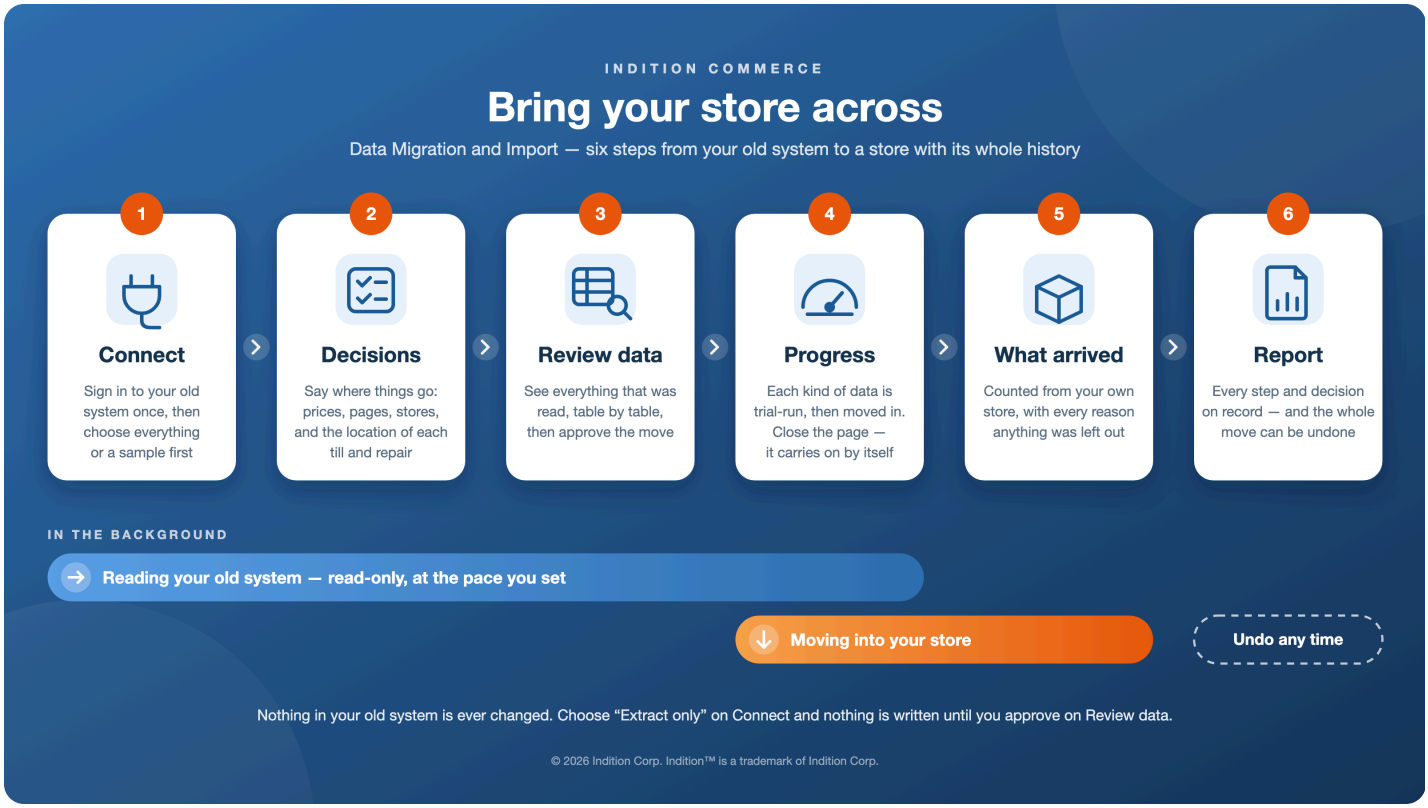
What it does



The six steps, and what runs in the background while you get on with your day.

Data Migration and Import moves your shop onto Indition without leaving your history behind. Your customers, products, categories, orders, line items, payments, serial numbers and repair work orders come across from your old system, linked up the way they were, so a customer's past purchases are still their past purchases.

It runs on its own. You sign in to your old system once, answer a few questions about where things should go, and it reads your old store in the background and moves everything in. You can close the page and come back.

Nothing in your old system is changed. It only ever reads.

What you need before you start

- Your admin address, username and password.
- Your Indition store set up with the price level, product page, order status and locations you want to use.
- Service & Repair set up, if you want your repair work orders too.
- About a working day for a typical store. Reading takes roughly ten hours for 30,000 records at the standard pace; moving the data in usually takes a few more.

Where to find it

Open **Apps → Bring my store across** in your admin menu. The journey runs along the top of every screen:

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Connect → Decisions → Review data → Progress → What arrived → Report

Only Connect is open until a migration exists. After that, opening Bring my store across always takes you to the step you are on.

Step 1: Connect

The screen is called **Bring your store across**.

1. Under the sign-in section, enter your old system's **admin address**, **username** and **password**.
2. Optionally enter **Email me when it has finished**.
3. Leave **Bring my repair work orders too** on if you want your repairs.
4. Under **How do you want to do this?**, choose how it should run.
5. Under **How much should we read?**, choose Everything or A sample first.
6. Press **Connect and start reading my store**.

It tests the sign-in before it starts. If your old system does not accept it, or cannot be reached, you are told straight away and nothing is created.

How do you want to do this?

CHOICE	WHAT HAPPENS
Read my old store and move everything in	Reads, then moves everything in on its own.
Extract only — let me look before anything is written	Reads, then stops. Nothing is written until you approve it on Review data.

How much should we read?

CHOICE	WHAT HAPPENS
Everything	Reads your whole store.
A sample first	Reads the first 1,000 of each kind of record (you can change the number), so there is something to look at in minutes. Read the rest later from Review data.

Your sign-in is encrypted and never shown again. It is kept for 30 days so a long read can sign itself back in whenever your old system ends a session, and you can delete it sooner from What arrived.

Step 2: Decisions

The screen is called **A few decisions**. Each question says why it matters. Most are already answered from what your store looks like; a question marked **Needs an answer** has to be answered before anything is written.

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Answer what you need and press **Save these answers**, or **Skip — the defaults are fine** if everything is answered.

Products and prices

- **Which of your price levels should the imported prices go into?** — Where each product's price from your old system is stored.
- **What status should imported products be given?** — Active and sellable, active but not sellable, or inactive, per status in your old system.
- **Where should imported products be sold?** — Which of your stores list them.
- **Which field holds your product descriptions?** — Where the description text goes.
- **Which page should display your products?** — The product page used, and optionally a different page per category.
- **Products or customers already in this store** — Skip, merge or replace when the same SKU or email is already here.
- **Departments as attributes** — Whether departments from your old system also become attributes.
- **Where are your product images served from?** — Normally answered for you.

Orders and repairs

- **What status should imported orders be given?** — Normally Completed.
- **Which store does each kind of sale belong to?** — Counter sales and web orders, each to a store.
- **How was each kind of sale handed over?** — The delivery method each kind of sale gets. Counter sales are always In Store Purchase, as sales from your registers are here.
- **Which of your locations took each till's sales?** — The location each order shows under. See below.
- **Which store do the repair work orders belong to?** — The store whose numbering repairs take.
- **Which of your repair locations took each old location's repairs?** — The repair location each work order shows under. See below.

Shops with more than one location

Two shops that share one catalog and price list are one store on Indition, with two locations. Your old system records the till each sale was rung up on and the location each repair was taken in, so each one can land where it belongs.

- **Tills/Stations:** each till from your old system is listed with its number of sales, the dates of its first and last sale and the clerks who used it most. Choose the location it stood in. Several tills can go to the same location.
- **Web pickups:** web orders a customer collected in one of your shops are listed by the shop they chose, with its address. Choose the location that shop is here, and they show on its In-Store Pickup screens.
- **Other web orders:** shipped orders and ones that recorded no delivery have one row, set to **Online store — no location**. They stay in your online store and are not listed under any shop. Choose a location instead if you want them there.

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- **Repair locations:** each location from your old system is listed by its own name, with a row for repairs that recorded no location. Choose one of your repair locations for each.

With one location these are answered for you. With more than one, nothing is guessed and the move waits until every row is answered.

Tills appear once the read reaches your customers' purchase histories, and repair locations once it reaches the repair work orders, its last step. Until then each question says it is coming. You can answer them while the read carries on.

Step 3: Review data

The screen is called **What we read from your old store**. It shows how far the read has got, and everything read so far:

- **What was read** — each kind of record with its count, a table view, a CSV download and a way to open records one by one. **Download everything as one archive** gives you all of it.
- **How the records link up** — how many orders found their customer, and how many sold products are in the catalog.
- **The log** — the latest lines of the read.

If you read a sample, **Read the rest of my store** reads everything else. Nothing already read is fetched twice.

Approving an extract-only migration

When the read has finished, **Ready to move in?** checks everything is in place. When it says Ready, press **This looks right — move it into my store**. To change an answer first, press **I want to change a decision first**.

Step 4: Progress

The screen is called **Bringing your store across**. It shows what is happening now and a table of every kind of data with where it is up to, how much is in your store and how much was not brought over.

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YOU SEE	WHAT IT MEANS	WHAT TO DO
Reading your old store	The read is running.	Nothing. You can close the page.
Sign in again	The stored sign-in no longer works, usually because the password was changed. Sessions that expire are renewed automatically and never cause this.	Enter the sign-in again and press Sign in and carry on.
Paused for a decision	A question needs an answer.	Answer it on Decisions, then Carry on moving my data in.
Something stopped	One kind of data failed.	Press Try again from where it stopped.
Moving your data in	Records are being written.	Nothing.
All done	Everything has moved in.	Look at What arrived.

Each kind of data is checked with a trial run before it is written, and only written if the trial comes back clean.

Step 5: What arrived

This counts what is now in your store: customers, products, orders, order lines, categories, repair work orders, addresses and product images. Product images arrive on their own over the next few hours.

What did not come over, and whether it matters lists the reasons records were left out, most common first.

When you are finished, press **Forget my sign-in** to delete your stored sign-in straight away.

Step 6: Report

The **Migration report** is the record of the whole move: when it was read and approved, how long the move took, how many records were added, filled in, already here, left out or failed, each step in order, the reasons for anything left out or failed, and the decisions it ran with.

Undoing the migration

At the bottom of the report, tick **I understand this removes everything this migration brought into the store** and press **Undo this migration**. It removes the records the migration added and puts back any fields it filled in on records you already had, last step first.

A record edited since the migration is left alone and listed, so you can look at it. If the undo stops, press **Start the undo again** when you are ready.

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Good to know

- **Only completed sales come across.** Pending, abandoned and refunded transactions are left out.
- **Orders get new order numbers** from your store's own sequence.
- **Existing customers are matched by email**, and existing products by SKU. What happens to a match is your answer on Decisions.
- **Customers without an email** are imported with a placeholder address so they can still be found and sold to.
- **Gift cards** used on a sale are recorded as a Gift Card payment, so the order adds up.
- **Serial numbers** sold are kept on the order line and in your serial register.
- **Shipped web orders** are imported but are not pickup orders, so they are not listed on In-Store Pickup screens.
- **Counter sales** are always In Store Purchase and are listed under the location of their till, even when your old system recorded a shipping charge on them.
- **Old web addresses** keep working: each product address from your old store redirects to the new product.
- **The pace** at which your old system is read is a setting. See the Setup Guide.

Getting help

If something stops and Try again does not clear it, contact your Indition support contact with the migration number shown on the console or report. The report's Indition team section holds everything support needs.

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