Platform Migration Checklist

What to clean up, map, and test before moving off spreadsheets or an outgrown tool.

CLEAN UP

- [ ] **Full backup of the old tool**
  Export a complete copy before anything moves, and store it somewhere separate.
- [ ] **Duplicate records**
  Merge or delete repeat entries so they do not carry over.
- [ ] **Unused or blank columns**
  Columns nobody fills in add clutter to the new setup.
- [ ] **Inconsistent entries**
  Standardize values like “FL” and “Florida” so filters and reports work.
- [ ] **Old or inactive records**
  Decide what to archive instead of move.
- [ ] **Files and attachments**
  Files stored in the old tool often need a separate export.

MAP

- [ ] **Old fields to new fields**
  Match each column or field to its place in the new tool.
- [ ] **Field types**
  Dates, dropdowns, and currency need matching field types or they import as plain text.
- [ ] **Links between records**
  Note connections, like a client and their projects, so they can be rebuilt.
- [ ] **Forms, automations, and integrations**
  List anything that sends data into or out of the old tool.
- [ ] **Users and access**
  Who uses the tool and what each person needs to see or edit.

Test before the switch

Run these checks before the team moves over for good.

TEST

- [ ] **Move a small sample first**
  Check a few records in the new tool before moving the rest.
- [ ] **Compare record counts**
  Totals in the new tool should match the old one.
- [ ] **Spot-check records**
  Compare a handful of records field by field against the original.
- [ ] **Run forms and automations**
  Test each one from start to finish.
- [ ] **Have the team try their daily tasks**
  Daily work in the new tool shows gaps before the switch is final.
- [ ] **Keep the old tool read-only**
  Leave it available but locked for a set period in case something was missed.

NOTES

Want help with your migration?

Operations and systems design for businesses at any stage.
Start with a free discovery call to talk through what your business needs.

Visit deebuilt.co

Field map

Where each field in the old tool lands in the new one. Type directly into this page or print it.

MOVING FROM

MOVING TO

OLD FIELD	NEW FIELD	FIELD TYPE	NOTES