

Handing over a Shopify store.

Three handovers in one: the store owner, the money and the apps. Work through it before the transfer invitation is sent, because several of these cannot be undone afterwards.

The store, the domain and Shopify Payments all move separately. There is a version of this for WordPress, Squarespace and Wix, and a general one, at adamroe.co.uk/blog.

STORE OWNERSHIP AND STAFF

- ☐ **The store is a client transfer store, not a development store**
Development stores cannot be transferred to a client at all. A client transfer store is made in the Dev Dashboard, and the name you give it is the permanent myshopify.com URL.
- ☐ **The client has a Shopify login on an email address they control**
The new owner has to exist before the transfer, and the invitation expires after seven days.
- ☐ **The client's name is against Store owner after the transfer**
A store has one owner, and only the owner can transfer it again or move a domain out of it.
- ☐ **The store email address in settings is the client's**
Shopify sends domain transfer links and large export files to the store email, not to whoever asked for them.

BILLING AND THE PLAN

- ☐ **The client's own payment method is in Settings, Billing, Billing profile**
The subscription, apps, themes, domains and shipping labels all land on the store's bill. After a client transfer there are no promotions or free trials, so it is full price from day one.
- ☐ **Anything outstanding below the billing threshold is settled or agreed**
If the threshold has not been met at transfer, the new owner is responsible for the outstanding bills.

MONEY: PAYMENTS, PAYOUTS AND SUBSCRIPTIONS

- ☐ **Shopify Capital and Shopify Credit are cleared**
Either one blocks a store transfer outright. Nothing else on this list matters until they are gone.
- ☐ **Shopify Balance is emptied, with Shopify Support involved**
An active Balance stops the transfer, and closing it is not something you can do on your own.
- ☐ **Shopify Payments is deactivated first, then set up in the client's name**
Shopify's instruction for a partner-built store is to deactivate Payments, Balance, Credit and Capital before transferring. Setting it up again takes a few days, because the details go to Shopify's banking partners for review.
- ☐ **The payout bank change is made on a quiet day**
Payouts pause for three to five business days after a change to a new external bank account, and payouts already scheduled go to the old account.

☐ **PayPal and any other provider are reconnected to the client's accounts**

Third-party providers are changed inside those providers, not in the Shopify admin.

☐ **Who handles refunds on earlier orders is agreed in writing**

Orders taken before the handover can still need refunding after it. Agree whose money it comes out of before the store moves.

DOMAIN AND EMAIL

☐ **The domain is transferred as a separate job**

Custom domains do not ride along with store ownership. Watch the 60 day locks after buying it, moving it in, or changing contact details.

☐ **For a .co.uk, a Shopify Support ticket is raised**

A merchant cannot transfer .co.uk, .be, .de, .ec, .eu, .se or .ph out of Shopify. Support has to do it.

☐ **For a .co.uk, the Nominet registrant transfer is done as well**

Changing who legally owns the name is separate from moving it between registrars. £10 plus VAT, and the new registrant has five days to accept.

☐ **The new host has HTTPS working before the domain points at it**

A Shopify domain moved to a platform without HTTPS shows visitors a browser error for the next 90 days.

☐ **Every email forwarding address lands in a mailbox the client owns**

Shopify sells no mailboxes, only forwarding, and those addresses travel with the domain when it moves.

DATA AND EXPORTS

☐ **Products, customers, inventory, orders and discount codes exported to CSV**

An export of more than 50 orders is emailed to you and to the store owner rather than downloaded, so do it when you know whose inbox that is.

☐ **The URL redirects are exported from Content, Menus, View URL Redirects**

They import back in bulk from CSV, so a copy in the handover pack is a copy somebody can restore.

☐ **The client is told in writing that Shopify does not back up stores**

Backups are the merchant's job, through exports, the theme files or a backup app. Most people assume the opposite.

☐ **The client knows orders can never be imported into a store**

Orders cannot be imported through the Shopify admin, so whatever else moves, the order history lives and dies with this store.

APPS AND THEMES

☐ **The apps are audited, and the client has the list with monthly costs**

App charges bill to the store rather than to whoever installed the app, so the new owner inherits every subscription started during the build. Uninstall what nobody uses first.

☐ **Which store bought the paid theme is recorded, and the files are downloaded**

A purchased theme is licensed only to the store it was bought for, including a duplicate store. The downloaded files are the practical code backup.

SEARCH AND ANALYTICS

-
- ☐ **Private mode is off and the password page is down**
Launching is a separate step from transferring, and Google cannot read the sitemap while a store is in private mode.
 - ☐ **The domain is verified in the client's own Google Search Console**
The sitemap cannot be submitted until it is, and the historic data cannot be recreated later.
 - ☐ **The developer's verification token is deleted, not just their access**
Remove the user and leave the token and they can re-verify ownership whenever they choose.
 - ☐ **The client has the Administrator role in GA4**
Nobody can add or change users without it, at account or property level.
-

ACCESS CLEAN-UP

-
- ☐ **Continuing developer access is a collaborator account, not a staff login**
Collaborators never count against the plan's user limit, and the Basic plan allows no extra staff users at all.
 - ☐ **The collaborator request code is regenerated after handover**
Generating a new four digit code stops every old one working, including any that was shared in an email thread.
 - ☐ **Settings, Users is reviewed and anyone outside the arrangement removed**
Collaborator access survives a transfer by default and only lapses after 90 days of inactivity, so it is easy to leave behind for years.
-

Take it, change it, use it in your own projects. No need to credit me. adamroe.co.uk/blog/shopify-store-handover