Adobe Commerce Upgrade Plan Checklist

Goals

Review current KPIs and adjust as needed.

Extensions & Customizations

Review all current extensions and customizations and ensure they are still needed based on business requirements.

Consider replacing any extensions that don't have a good track record of keeping up-to-date with Adobe Commerce versions.

Team

Ensure, you have the right team in place, with the proper Adobe Commerce certifications and skillset.

Budget & Timing

Use the Adobe Commerce release calendar to plan your next upgrade and prepare ahead of time.

Discuss which versions you'll adopt next year (full and security patches) based on anticipated needs.

Set aside budget and team capacity for the upgrade.

3rd Party Integrations

Review current Adobe Commerce third-party integrations you have and their maintenance windows for the year. You may want to align your upgrades together.

Scope & Deployment Planning

Early access activities

› Partner participates in Beta program

› Review Beta release notes

Agree on budget, timeline, scope.

Run the Upgrade Compatibility Tool to identify potential issues prior to upgrading.

Consider using the upgrade to address issues identified by the Site Wide Analysis Tool.

Document dependencies and any technical stack changes required such as PHP or Elastic Search versions.

Gather project team with Adobe Commerce certifications.

Create a stakeholders communications plan.

Plan maintenance window if downtime is anticipated.

Review and approve the testing strategy; use the Application Testing Guide or a third-party automation suite.

Confirm all extensions / customizations are compatible.

Review post-launch steps if issues are discovered during or after upgrade.

Post Deployment

Monitor site for issues – performance, order processing, analytics, and others.

Perform Adobe Commerce security scan or other third-party scan and review potential security vulnerabilities.

Perform a retrospective with all stakeholders and document what went well and what didn't and how to improve.

Modify your plan for the next upgrade with lessons learned.