



MIGRATING FROM MAGENTO 1 TO MAGENTO 2



FULL SERVICE E-COMMERCE AGENCY

Helping brands with online growth and digital
transformation for over 20 years



INTRODUCTION



Magento recently announced that support for all versions of Magento 1 would be discontinued by June 2020 so, if you are still on Magento 1, you should be planning your migration to Magento 2 as soon as possible.

Bearing in mind that it will probably take 4 to 6 months to build your new Magento site, you should already have a firm idea of when you plan to kick off this project in order to go live in time.

On the plus side, Magento 2 has come a long way since it was launched in 2015 and now includes many improvements and feature enhancements that you can exploit to further grow your business online. In this White Paper we will be providing an overview of the improvements included in the platform, as well as the key steps you will need to go through in order to successfully migrate across.

Choosing the right agency to help you with this is critical to your success and not something you should undertake lightly. It is crucial that you check that they are trained and certified on Magento 2 and that they have successfully migrated a number of clients across already. It might be a tricky process but with the right agency to help you, you have a much better chance of getting a return on your investment.



What will migrating my store to Magento 2 bring me that I don't already have?



1. Faster checkouts with Amazon Pay

Magento now includes Amazon Pay, providing 300 million active Amazon customer account holders^[1] with a fast and easy way to checkout with Magento Merchants.

Using Amazon Pay allows these shoppers to leverage the payment and address information already stored in their Amazon accounts to skip tedious tasks at checkout.

Amazon Pay is fully optimised for desktop, tablet and mobile shopping and customers using Amazon Pay never leave your site, creating a streamlined experience primed for higher conversion rates.

Merchants also benefit from Amazon's advanced fraud protection and payment guarantee policy, recurring payment support for subscription-based services, and multi-currency processing for international sales expansion.

[1] Amazon data: Q4 2017, Active customer accounts, which are unique email addresses, represent accounts that have placed an order during the preceding twelve months.

A woman with long dark hair is sitting at a wooden table in a cafe, looking down at a tablet computer. On the table is a white coffee cup and a small vase with a plant. The background is blurred, showing other people and indoor plants. The Amazon Pay logo is overlaid in the center of the image.

amazon pay

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2. Paypal In-Context Checkout

PayPal In-Context Checkout enables faster repeat purchases by using PayPal to store credit cards and address information for shoppers.



The screenshot shows the PayPal login interface. At the top, it says 'Log in to your account' and 'PayPal, Inc. [US] https://www.sandbox.paypal.com/checkoutn...'. The main heading is 'Log in to PayPal' with the subtext 'Enter your email address to get started.' Below this is an 'Email address' input field and a blue 'Next' button. There is a link 'Having trouble logging in?' and an 'or' separator. Below that is a grey button 'Pay by Debit or Credit Card'. At the bottom, there is a link 'Cancel and return to Demo Portal's Test Store' and a footer with 'Privacy PayPal' and 'Copyright © 1999-2018 PayPal. All rights reserved.'



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3. Flexible payment terms with Klarna

Another way Magento is reducing barriers to purchase is by including flexible payment options from Klarna. Their *Pay Now* offering allows customers to check out quickly and securely with direct debit or bank transfer in selected European markets.

The *Pay Later* option increases conversion rates by allowing customers to pay up to 30 days after delivery via invoice for a "try-before-you-buy" experience and extremely fast mobile checkout.

Their *Slice It* solution increases shopper purchasing power by allowing them to pay in instalments at a low interest rate.

Merchants see a 62% higher average order value for customers using Klarna credit solutions. You can easily configure Klarna to fit your checkout look and feel and shoppers never leave your site during their quick application process. Klarna also assumes all credit and fraud risk and ensures merchants are paid for ordered goods.

Klarna.®



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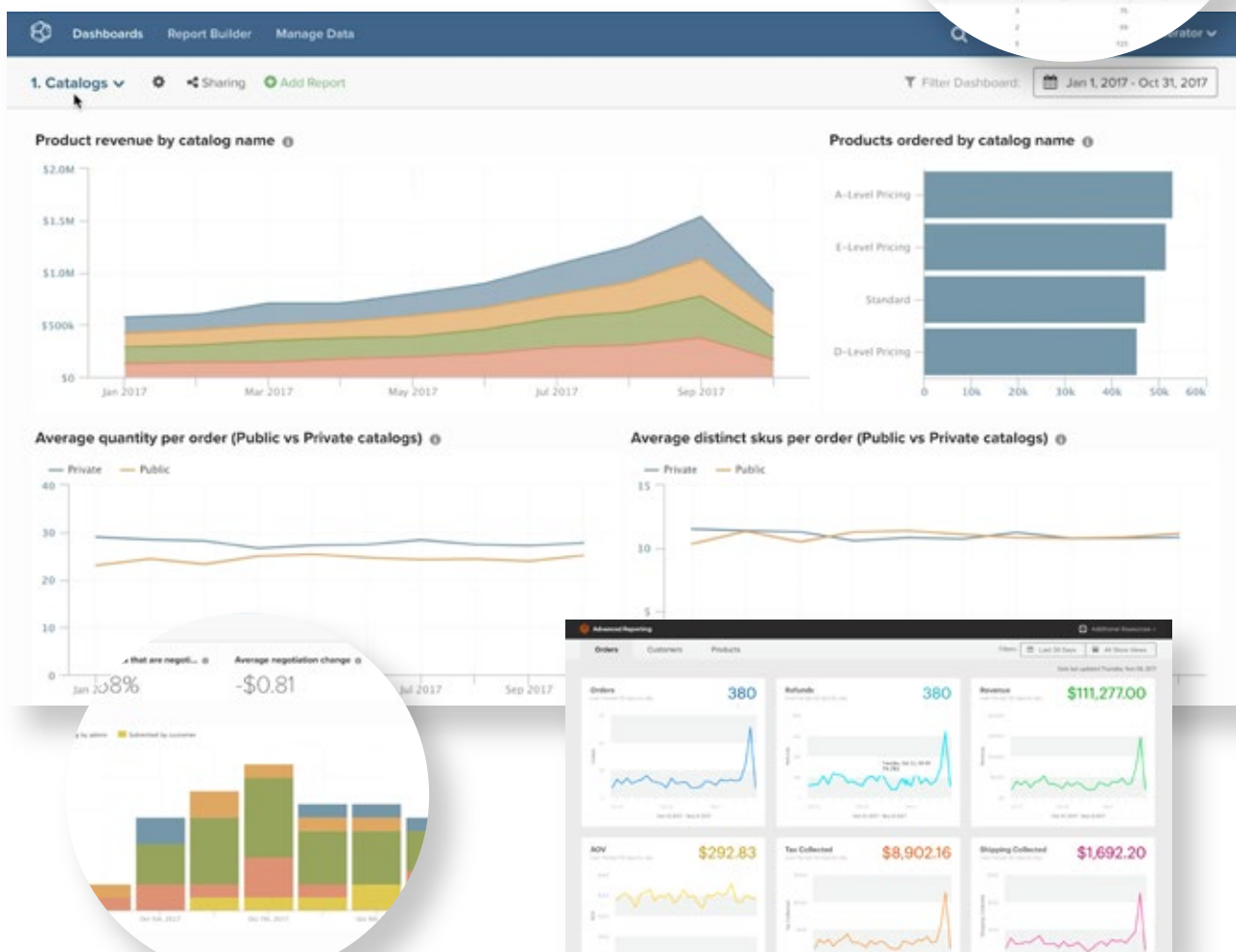


4. Advanced reporting powered by Magento Business Intelligence

Magento Business Intelligence provides a complete commerce analytics platform to make it easy for non-analysts to gain valuable insights from their data such as what their customer lifetime value is across different segments.

Magento BI includes the following:-

- 🏠 A simple, easy-to-use UI with drag and drop metrics.
- 🏠 One-click filtering and an easy chart builder.
- 🏠 Easy collaboration on reporting.
- 🏠 Email segmentation capabilities.
- 🏠 Marketing ROI reports.



Data-Driven Dashboards for B2B Merchants

B2B reports that are available out of the box when you use Magento Business Intelligence Essentials.



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5. Fast and accurate tax calculations with Vertex

Transparency is key to reducing cart abandonment rates. Shoppers want to know exactly what they will pay - including taxes - right from the cart. But accurately calculating taxes can be challenging.

That's why Magento now integrates with Vertex, a leading provider of tax technology solutions. With Vertex you get automatic, real-time and accurate sales tax calculations that take into account the latest rates and rules, product taxability status and customer exceptions.

It can easily handle tax calculations when coupons or promotions are present and for credit memos, too. Beyond accurate calculations, Vertex also helps you to simplify operations with tools to generate and file signature-ready PDF returns in a timely manner.

Vertex automatically calculates taxes in the cart based on the customer's postcode.

01 CUSTOMER INFO 02 SHIPPING INFO 03 PAYMENT SELECTION

Customer Information

FIRST NAME

LAST NAME

ADDRESS

COUNTRY

CITY

POSTAL CODE

PHONE

[Return to Shop](#) [CONTINUE TO SHIPPING](#)

Shopping Cart 2

Lightweight College Backpack €99.90

Business Casual Leather Watch Waterproof €69.90

Have a Voucher?

Subtotal €169.80

Shipping Free

Tax ...

Total €169.80

CITY

VERTEX[®] SMB

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6. Competitive flexible shipping options

Choice applies to shipping rates too. With large online retailers setting high expectations around fast, low-cost or no-cost shipping, shoppers want competitively-priced options presented at checkout.

This is where Magento Shipping can help. Its easy access to multiple carriers and rates enables you to provide a range of shipping options that meet your shoppers' delivery timeframes and budgets.

Furthermore, Magento Shipping streamlines fulfilment and improves business efficiency by enabling your team to shop for rates across carriers, set up fulfilment automation rules and handle returns, all right from the Magento Admin Panel.



Access the carrier services you need to support your business and decrease integration costs.



Quote, book and track shipments directly from the Magento 2 interface.

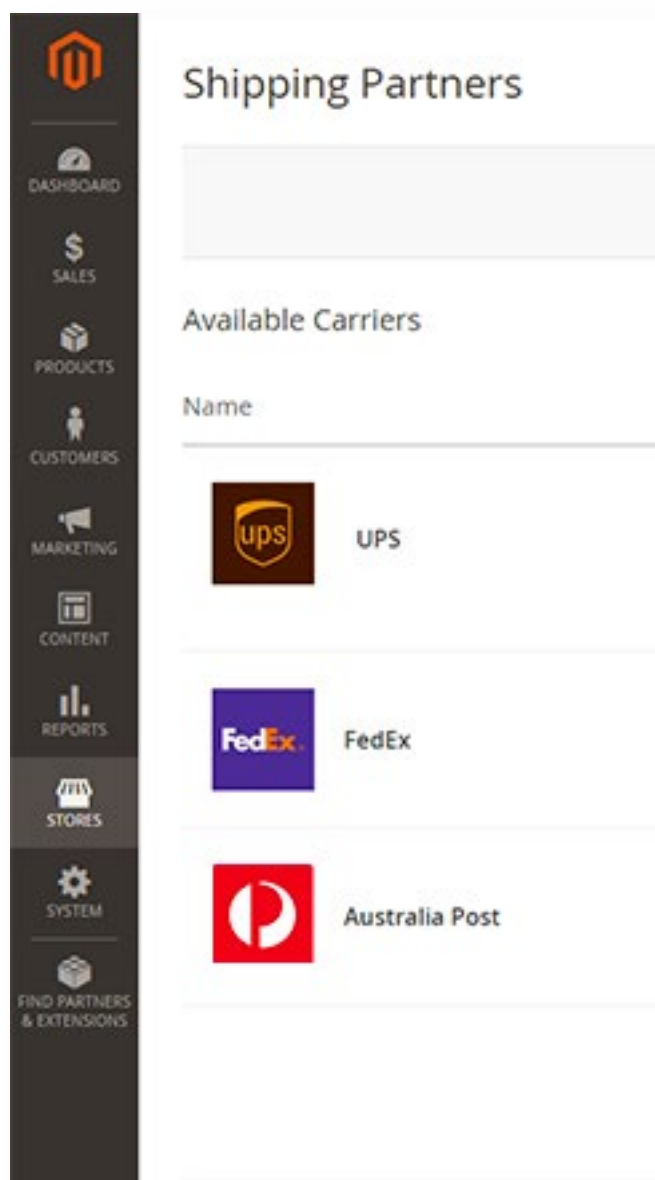


Easy sign-up and account authorisation with your selected carriers.

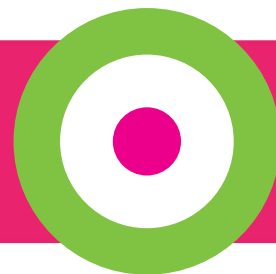


Display relevant shipping options to your customers based on location, warehouses, products and more.

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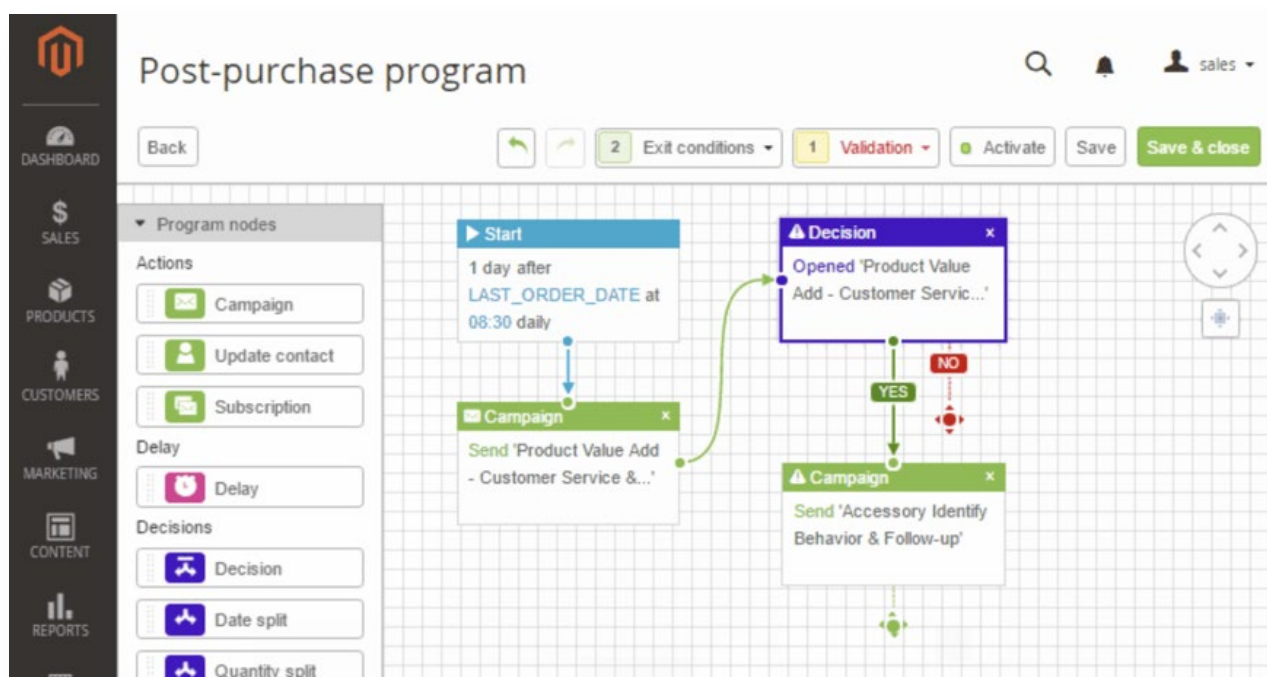


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7. Powerful email marketing with Dotdigital

Dotdigital is a premier marketing automation platform which is used by some of the world's most renowned brands. Dotdigital comes pre-loaded in Magento 2, with verification for quality by Magento's development team. Merchants can enjoy single sign-on and access to richer real-time data with a deep integration that enables them to create campaigns inside the Magento Admin Panel.



dotdigital








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8. Magento B2B

Magento 2 contains all the features merchants should need to service their B2B channel online including:-

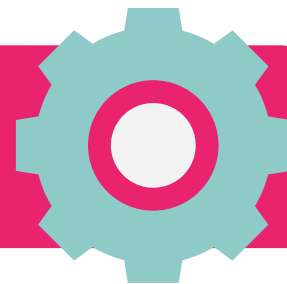
-  The ability to efficiently manage quote requests and negotiate pricing with streamlined workflow.
-  The ability to create custom catalogues and personalised price lists for individual companies or groups of customers.
-  The ability to support sales to corporate accounts with multiple levels of buyers and varying roles and permissions.
-  Extensive APIs and off-the-shelf extensions for integration with any ERP, CRM or back office system.
-  Frictionless reordering for common purchases.



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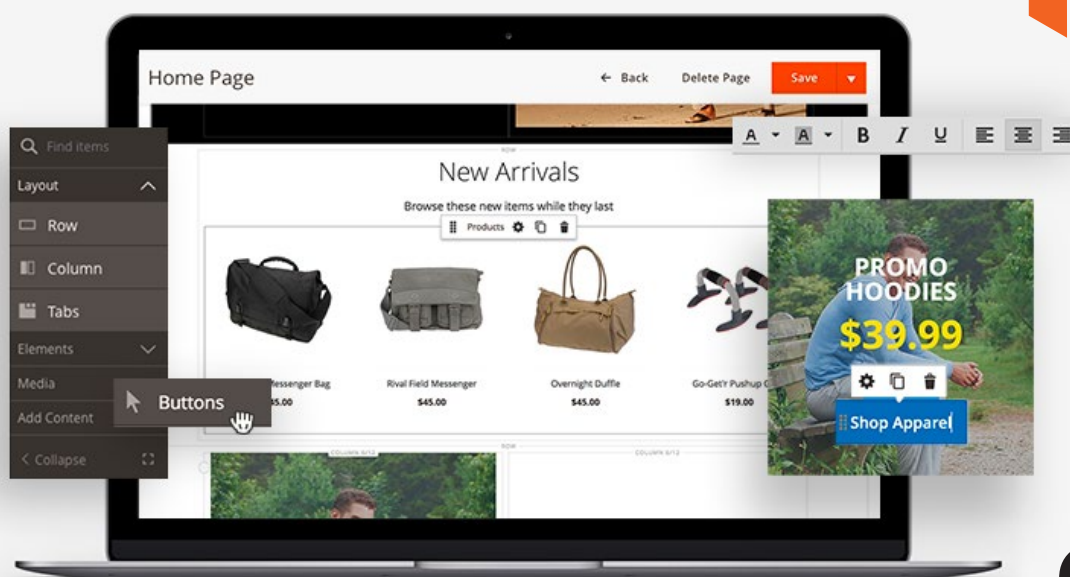


9. Page Builder

One major feature in Magento 2.3 is the release of Page Builder in Magento's native CMS. Page Builder adds features such as drag-and-drop interface; a different set of content types like images and videos; and a preview functionality which will allow non-technical users to manage their content on their own.

With this Page Builder everyone can create a new page, edit products, add categories and update the content quickly and easily without the help of any technical resource.

Page Builder is fully functional in Magento 2.3 and features a media gallery and widgets so that these assets can easily be integrated within your pages. Page Builder can also be used to create your own dynamic content block that can be used throughout the site and, with staging and preview functionality, content can be scheduled to go live as and when required.



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10. Progressive Web Apps (PWA) Studio

A PWA (Progressive Web App) is actually a website that functions as a mobile app. PWA eliminates the need for developing a native mobile app. Rather, a single app functions both as a mobile app and a web app. The layout would be different depending on the users screen size, exactly as it is in responsive web design, allowing you to deliver the optimal user interface for each user. It also allows caching of data so the website/app continues to function in the offline mode.

PWA Studio enables merchants to deliver better mobile experiences – indirectly boosting the store conversion rates and increasing engagement. PWA Studio now lets developers use standard themes without the need for separate customisation for mobile and web.

PWA Studio also speeds time-to-market websites and lowers the total cost of ownership. Since it is an open source framework, developers can hope to receive regular updates, independent of the future Magento release schedule.



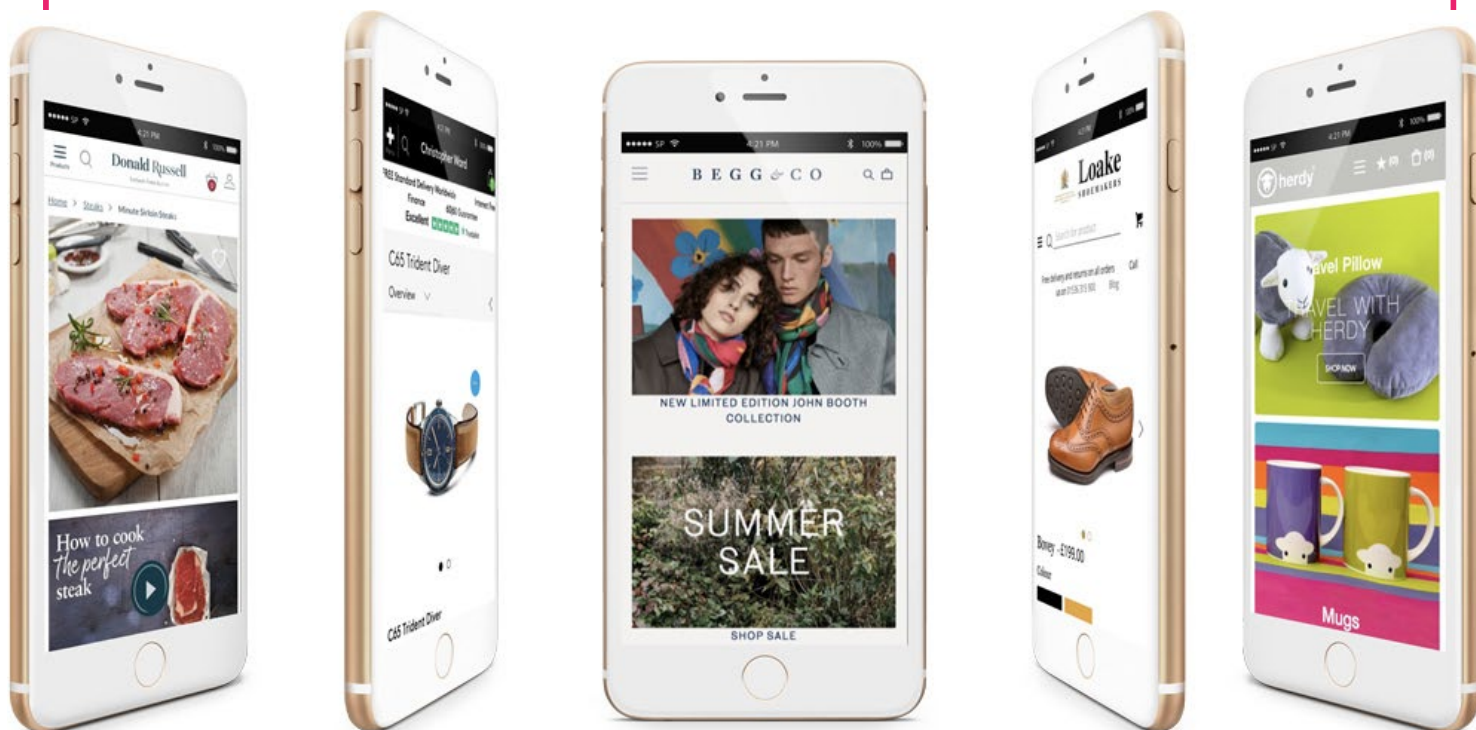
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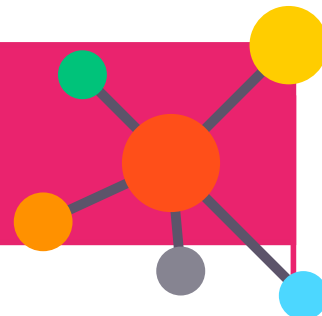
11. Performance improvements

Magento 2 officially supports the latest PHP versions (starting from PHP 5.5.x), including PHP 7. Those versions already include new security fixes and improvements that directly affect website speed.

- On the server side, there is a very welcome improvement - the ability to use Varnish caching out of the box, so third-party modules are no longer required. Full Page Cache is also supported.
- Magento 2 has minimised and bundled JavaScript. This reduces unnecessary browser operations on the client side, therefore reducing page load times.
- Image compression - it is now possible to optimise images directly on the server using Magento 2 built in tools. With Magento 1 this had to be done manually.









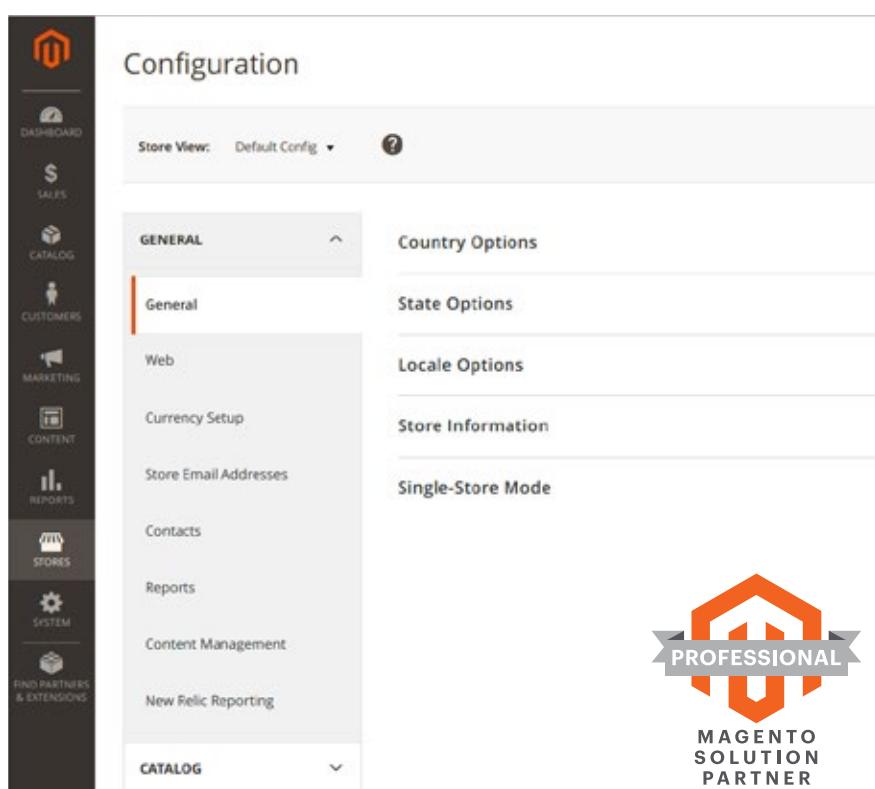
What will migrating my store to Magento 2 bring me that I don't already have?



12. Admin panel user improvements

In comparison with Magento 1, the admin panel in Magento 2 is much more user friendly and intuitive. Please find below a list of all the main areas of improvement:




-  New, improved and more modern admin panel navigation interface which allows you to find information and manage your store more efficiently from all devices, including mobile.
-  Staging and Preview functionality which allows you to plan changes to your site and schedule them.
-  New guided product creation workflow allows for faster product creation.
-  Customisable admin grid which allows users to control product filters as well as to add or remove columns to a grid and drag and drop them in any order.
-  Grids can be saved into "views" per user for easy reuse and optimised workflow.
-  Improved CMS and Page Builder with drag and drop functionality, easy content integration, and simple third party content integration (e.g. videos) and static block integration (see Bluefoot acquisition).

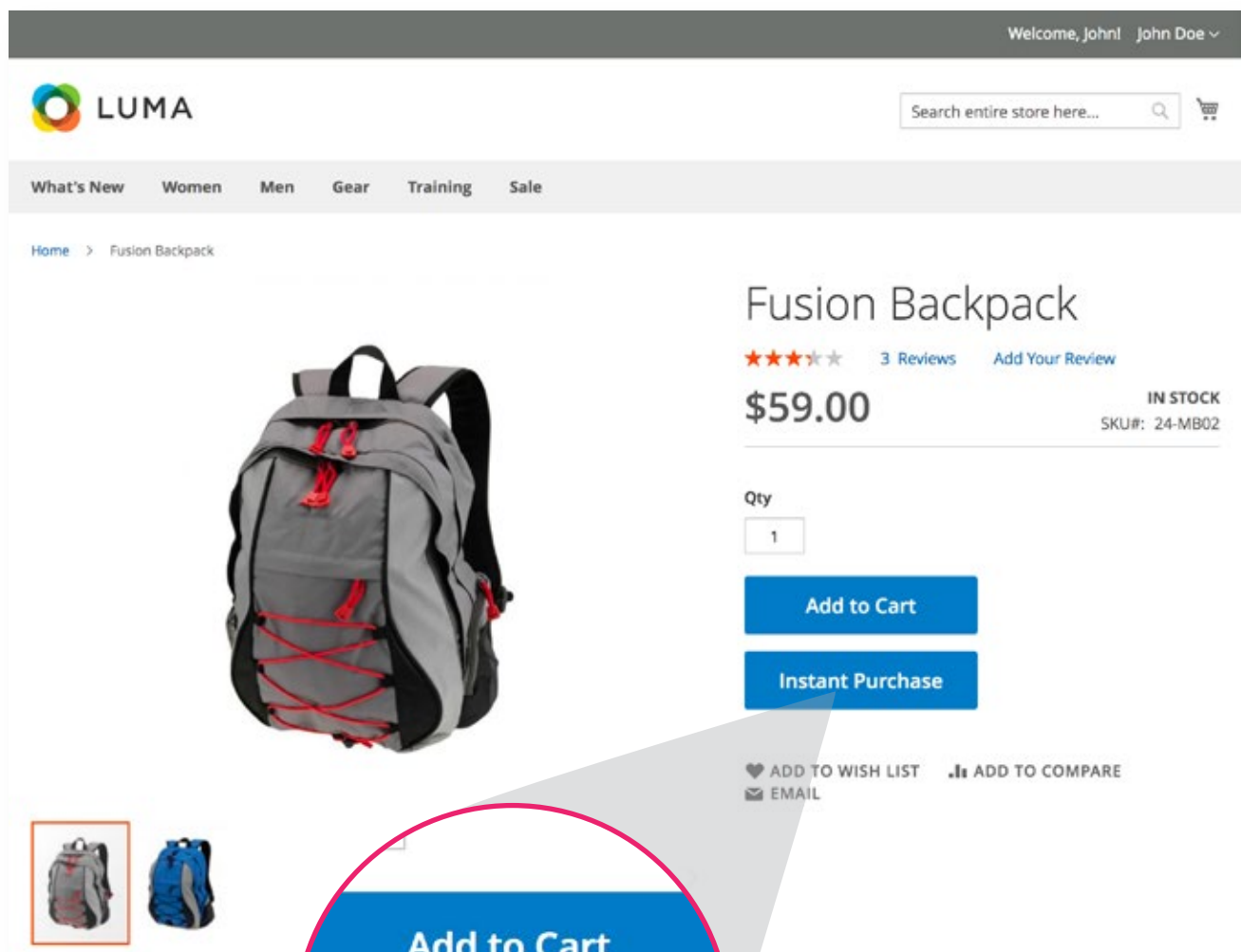


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13. Improved streamlined checkout

-  New, 2-step checkout process for improved conversions.
-  Assisted log in feature which speeds up sign-in for returning customers by scanning a users email address for an existing account and prompting for a password.
-  Post-order account creation, allowing guests to easily create an account upon placing an order.



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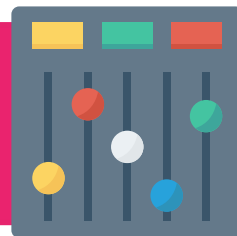


14. Security





- 🏠 More secure and robust admin and customer password management.
 - 🏠 Secure forgotten password flow
 - 🏠 Changes to sensitive admin information requires password input
 - 🏠 Locking mechanism for failed login attempts
 - 🏠 Triple-layer customer password policies
- 🏠 Randomly generated custom admin path for admin accounts.
- 🏠 Restriction of “/downloader” path.
- 🏠 Improved encryption and hashing algorithms.
- 🏠 Improved Cross-Site Request Forgery protection for admin and customer accounts.
- 🏠 Cross-site Scripting protection across the entire codebase.
- 🏠 Avoidance of vulnerable/dangerous PHP functions such as eval and unserialize.
- 🏠 Verified recommendation for secure file ownerships and permissions.
- 🏠 File upload security improvements with strict rules.
- 🏠 Easier to manage component versioning which eliminates the need for separate security patches.



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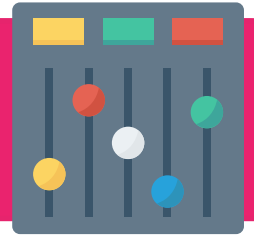


15. SEO improvements

-  Responsive for better rankings in Google.
-  Rich snippets on the catalogue pages improve search results in search engines.
-  Management of Robots.txt.
-  Addition of Google Tag Manager.








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How to get there successfully

Now that you are aware of all the benefits of moving to Magento 2, let's talk about how we can help you get there successfully.

In this second half of this white paper, we will cover the following:-

-  Scoping the Project
-  Making sure you get what you have asked for
-  Make sure you are prepared for User Acceptance Testing
-  Plan your Launch
-  Plan for life after live

Scoping the project

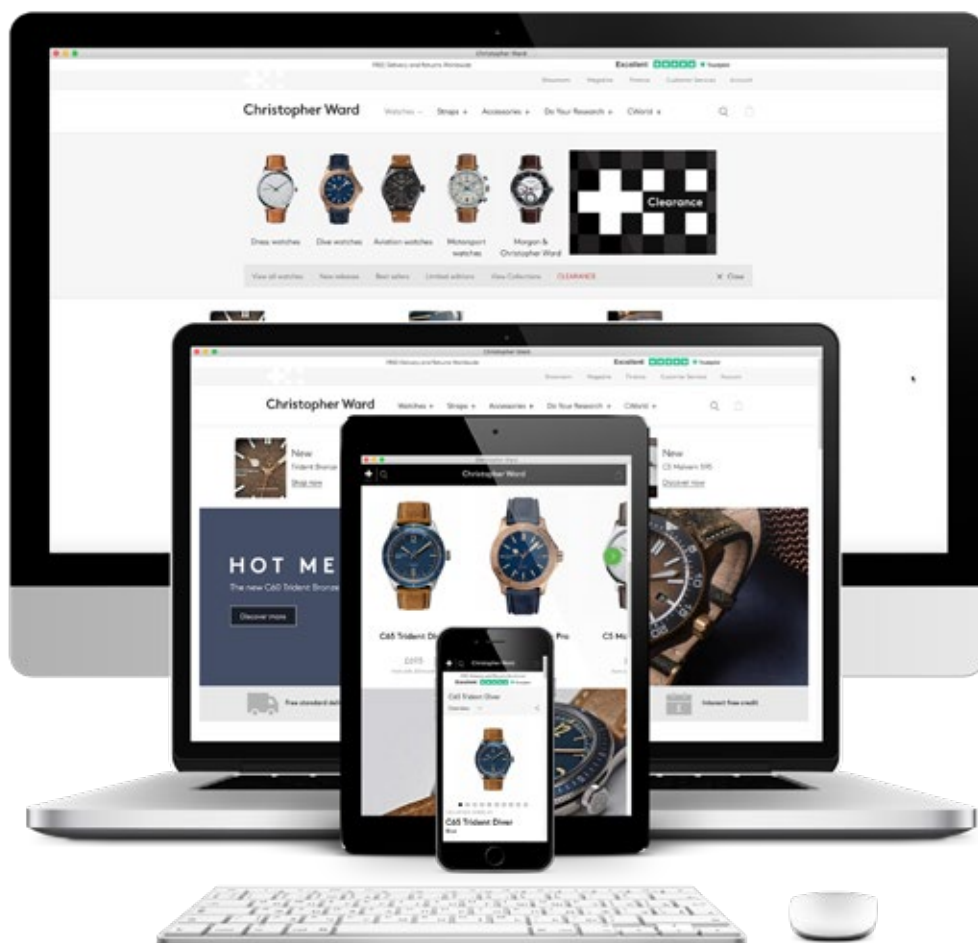


Scope

The process generally starts with a conversation that ends up with a vaguely "hand-wavy" request like "quote us for whatever we have on the existing site at the moment". While this might seem like a sensible starting point, it ties the new site into the design, UX and UI decisions that may have been made 3, 4, 5, or more years ago.

Why that happens?

Perhaps the client team managing the website weren't involved in the original site build and don't know what's in the site. They would not want to risk losing any functionality that is vital to the successful operation of the site.



How should it be done?



Define your requirements

Spend time creating a requirements document/list that covers what your business is doing now and what it will need to do in the next 3-5 years. This is something that your agency can help with of course and in doing so, gives you an excellent opportunity for them to share their expertise and use examples from where they've helped clients solve the same challenges in the past.

- Take the time to understand how Magento 2 is different to (and in most cases better) than Magento 1.
- Get a demo or walk-through of a vanilla Magento install, front and backend, so that you know what the starting point is.

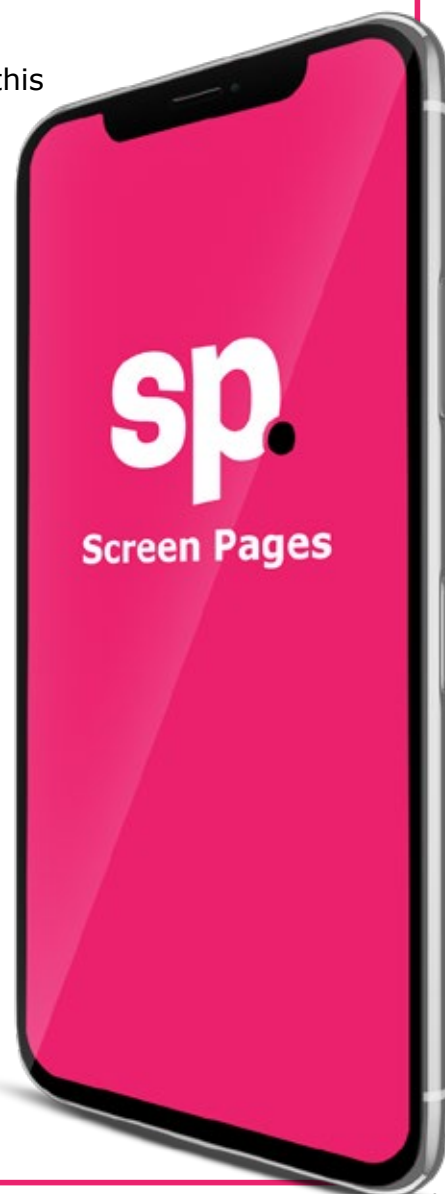
Once you and your agency have agreed on the business goals for the site and the broad functionality you'll need it to include, you should be able to get a rough idea of the cost and time it will take to deliver your new project.

There can be a temptation to try and throw everything in at this stage but you also have to consider your resources. Are you going to be able to continue doing the day-to-day business with your current website, while getting the content into shape for the new website and working out how to deal with entirely new functionality?

What if you need something that's not included out of the box?

The Magento Marketplace is a great source of a wide variety of extensions that can help deliver really complicated functionality for a far smaller investment of time and budget.

Your agency will probably have worked with a number of these technology vendors before and so listen to their recommendations, both positive and negative.



Making sure you get what you ask for



Make sure you communicate your design requirements to your agency.

This can be done via a design requirements workshop which makes sure your agency understands the direction the brand is heading in, bearing in mind the scope of the project and what elements/budget you have to work with. Make sure that all of the stakeholders are present to ensure the best outcome.

Discuss your technical requirements in detail and make sure they are documented.

Ideally, the agency team will consist of solution specialists, technical experts, project managers and/or business analysts so that they can respectively advise on solutions, answer technical questions, make sure things fit within the scope of what's being delivered and can take notes that they'll use to write up the specification that you ultimately sign off.

The benefit of this meeting is that you will have a firm idea of the individual elements of the build you'll be getting and the agency gets to understand the specifics of what you want and don't want.

Don't be surprised if during these meetings you identify new requirements that increase the scope of the project but be wary of "gold plating" things for the sake of it. The overall scope of a project can change by about 5-10% just during these meetings and you may well add as many things in as you take out.

Request a specification document, designs and a project timeline from your agency.

Make sure you review these, discuss them, understand them and sign them off before any development starts. That way you will know what you are getting.

Plan the data migration

Magento have built an excellent set of data migration tools but avoid the temptation to use them for everything.

We generally arrive at three categorisations of migrated data:

- Migrated "as is" using the data migration tools
 - Orders, customers, invoices
- Entered into the new site through the new Magento 2 Admin Panel
 - Promotions, content blocks, content pages
- Imported using other bulk export / import processes
 - Product & category data, URL re-writes

Plan and document the integration carefully

- Should cover each data exchange that is being created to a third party system.
- Should clearly state frequency, data exchange mechanism, the individual fields being exchanged, any logic performed on them and the error reporting that each has.
- Should also be clear about who has responsibility for the data and process at each step.
- Signed off by you and your and third party system providers just like the designs and functional specification.

Make sure you are prepared for user acceptance testing



Preparing for testing

Once the site is nearly ready for the testing phase, start planning out who you're going to get trained and on what.

- How many training days are included in the budget?
- Who's going to be trained by the agency and who's going to train your other team members?
- What specific elements of the site will the training cover?
- Start reporting bugs as soon as possible.
- Share the progress through your test plan whenever you speak to your agency.
- Around 50% of the issues raised during UAT will be "how to" type questions, rather than bugs.

Plan your launch

- Make sure you have a styled holding page for the Magento 1 site.
- Agree a time where the impact of the launch will cause the least disruption.
- Pause any paid marketing at and just after launch.

Plan for life after live

- Ask if the agency will have an experienced team on hand to solve any teething issues identified in the first few days or weeks.
- Go through the new requirements identified in the project, start planning these out into a release schedule.
- It's also likely that now the site is in the hands of customers, more urgent requirements will be identified that need quick resolutions.
- Measure the change in KPIs and feed this into driving the planned development.

How can Screen Pages Help?



We are a Magento 2 certified Solution Partner with an extensive track record of successfully migrating Magento 1 sites across to Magento 2.

Since 2009, we have designed, built, hosted and supported over 100 Magento stores.

In addition, we have helped a large number of our clients upgrade between versions and others, or move their sites from their old suppliers to us with minimal disruption to their businesses.

We are recognised within the Magento community as experts in the migration process and have been invited by Magento to present at a number of events on best practices in this area, including their annual conference held in Las Vegas every Spring called Magento Imagine.

Migration from any version of Magento 1 to Magento 2 involves four components: front-end design, extensions, bespoke customisations and data.

www.screenpages.com



Conclusion



Contact us

This is a big decision for you so you need to make sure that you choose the right partner to help you through this process and plan it carefully.

Screen Pages has extensive experience in doing this. We employ certified Magento developers and solution experts.

Our designers understand usability and eCommerce best practice in many verticals ranging from fashion, homewares and gifting to charities and B2B online retailers.

Our professional, well-qualified project managers will guide you through the process and help you get the most out of this important transition.



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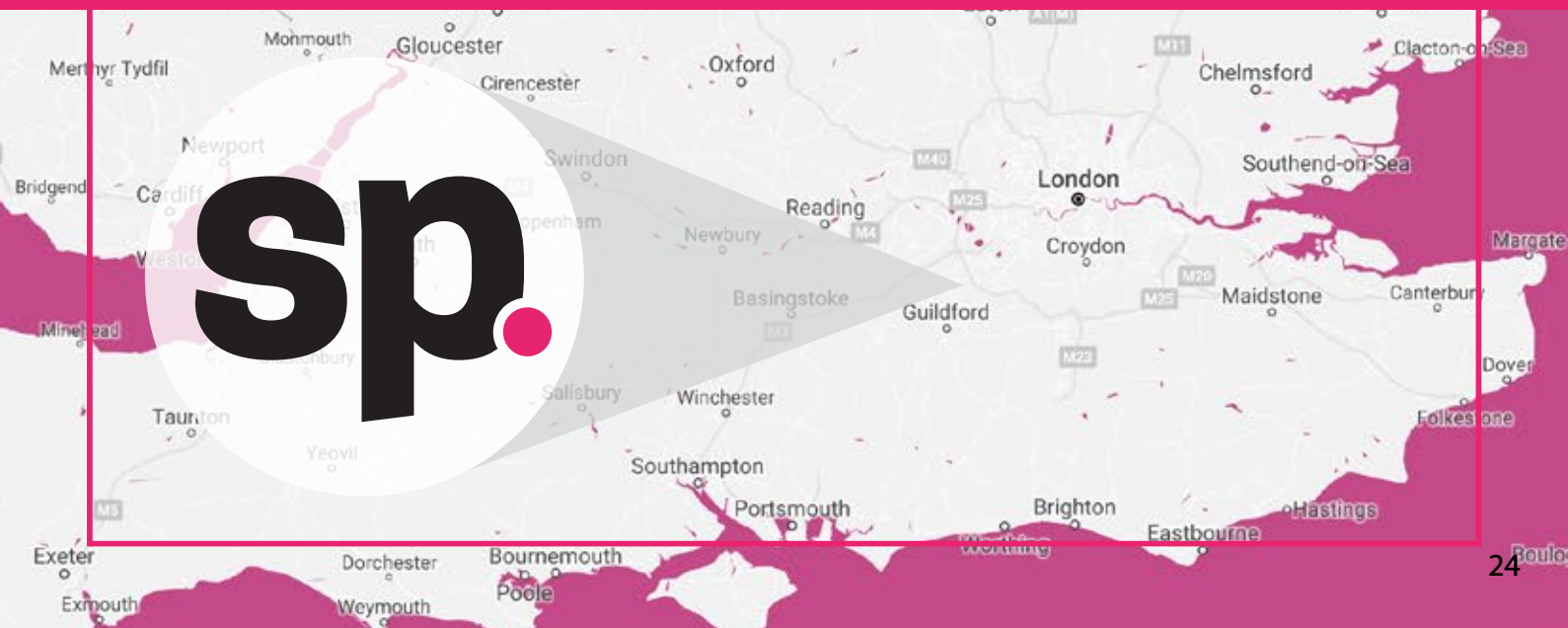
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