

Migrating from Magento 1 to Magento 2



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Introduction

Support for all versions of Magento 1 will be discontinued by June 2020, so if you are still on Magento 1, with less than 6 months to go, you should be starting 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. With the right agency to help you, you have a much better chance of getting the work completed in time and getting a good return on your investment.

1. The benefits of Magento 2

1.1 Improved payment options

As of version 2.3.3, core payment methods integrations are now compliant with 3D secure version 2 regulations (PSD2) which came into effect in September 2019 in the EU.

Please find below some of the many payment options included out-of-the-box.

1.1.1 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.

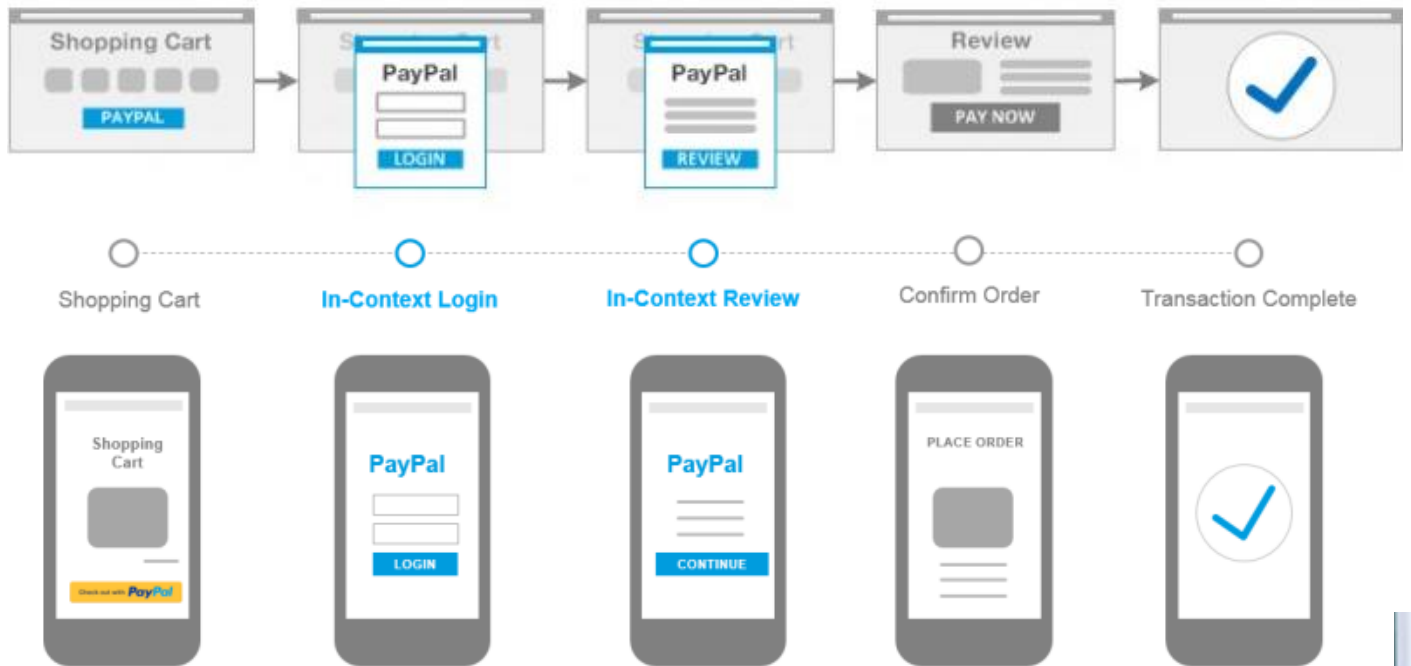
Amazon Pay is fully optimised for desktop, tablet and mobile shopping and customers using Amazon Pay never leave your site, creating a streamlined experience primed for higher conversion rates.

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.

1.1.2 PayPal in context checkout

PayPal in context checkout enables faster repeat purchases by using PayPal to store credit cards for shoppers. With version 2.3.3, there is improved coverage for PayPal payment integrations, including PayPal Express checkout, Payflow Pro, Link Express Checkout and Braintree.



1.1.3 Flexible payment terms with Klarna

Another way Magento is reducing barriers to purchase is by including flexible payment options from Klarna. Their offering allows customers to choose from the following options:-

Payment Methods

Klarna. Instalments

Interest-free alternative to credit with 3 instalments.

Klarna. Pay in 30 days

Offer an extra 30 days to pay.

Klarna. Financing

Gives your customers the option to pay over 6 to 36 months.



On average, 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.

In addition, Klarna now offer an app. When it was released in the UK, it quickly became the 3rd most downloaded shopping app on the UK App Store.

With more than 80 million customers globally and over 1 million transactions per day, any merchant would be amiss for not including it at checkout.

1.2 Advanced reporting powered by Magento BI

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.

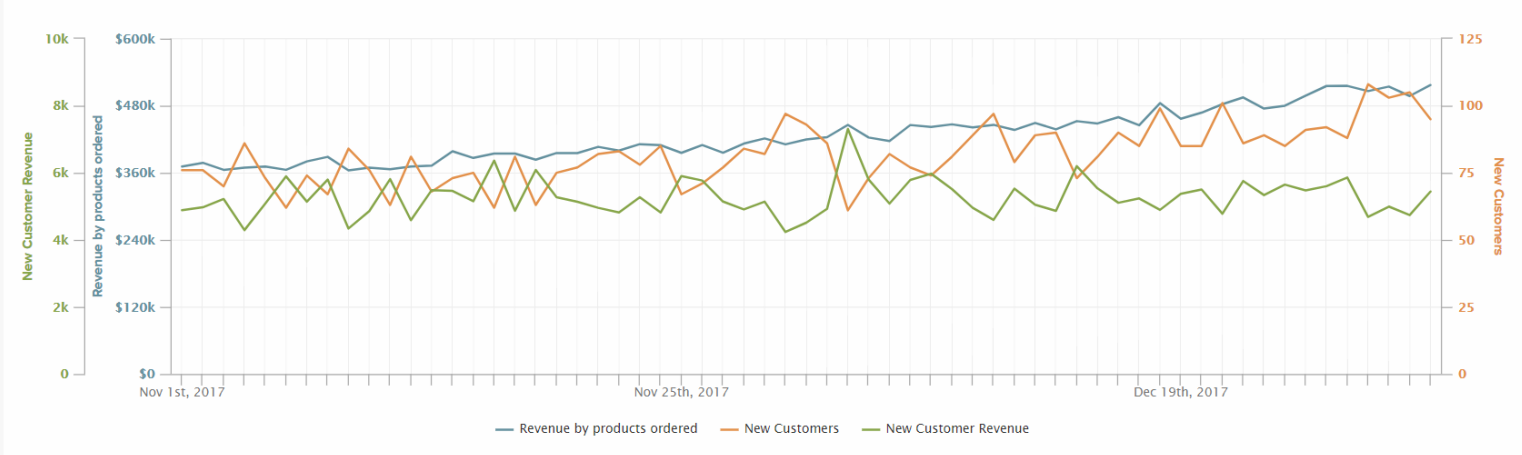
Magento BI includes the following:-

- 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

Navigation bar: Dashboards | Report Builder | Manage Data | Internal Magento Demo - Essentials

My Dashboard | Sharing | Add Report | Filter Dashboard: All Stores

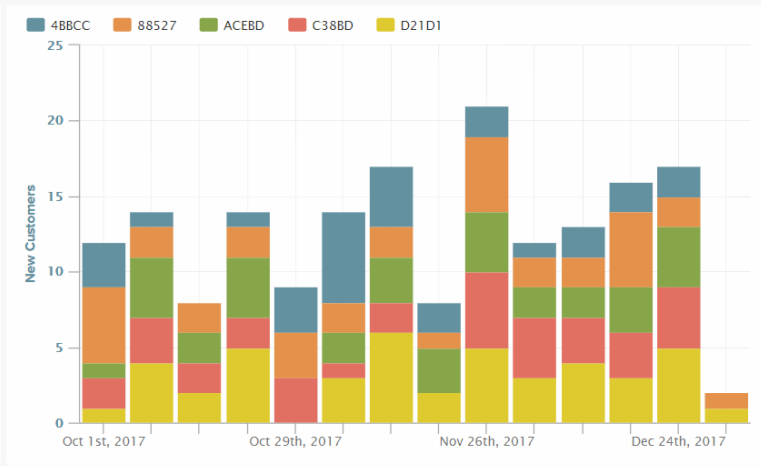
2017 Holiday Sales



2017 Holiday Sales Data

	Revenue by products ordered	New Customers	New Customer Revenue
Wednesday, November 1st, 2017	\$371,228.00	76	4,884.5
Thursday, November 2nd, 2017	\$377,883.00	76	4,972.1
Friday, November 3rd, 2017	\$365,327.00	70	5,218.9
Saturday, November 4th, 2017	\$369,059.00	86	4,291.3
Sunday, November 5th, 2017	\$371,167.00	73	5,084.4
Monday, November 6th, 2017	\$365,350.00	62	5,892.7
Tuesday, November 7th, 2017	\$380,395.00	74	5,140.4
Wednesday, November 8th, 2017	\$388,556.00	67	5,799.3
Thursday, November 9th, 2017	\$364,417.00	84	4,338.3
Friday, November 10th, 2017	\$369,293.00	76	4,859.1
Saturday, November 11th, 2017	\$366,183.00	63	5,812.4
Sunday, November 12th, 2017	\$371,409.00	81	4,585.3

Q4 2017 Coupons Used for Initial Order



1.3 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 shopping basket 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.

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

The image shows a screenshot of a Magento checkout page. The page is divided into three main sections: 01 CUSTOMER INFO, 02 SHIPPING INFO, and 03 PAYMENT SELECTION. The 'Customer Information' section includes fields for First Name, Last Name, Address, Country (a dropdown menu with 'Select your Country'), City, Postal Code, and Phone. A magnifying glass is positioned over the 'City' input field, which is also highlighted by a red circle. To the right of the customer information is a 'Shopping Cart' sidebar. The cart contains two items: 'Lightweight College Backpack' for €99.90 and 'Business Casual Leather Watch Waterproof' for €69.90. Below the items, there is a 'Have a Voucher?' section with a dropdown arrow. The cart summary shows: Subtotal €169.80, Shipping Free, Tax --, and Total €169.80. At the bottom of the customer information section, there is a 'Return to Shop' link and a 'CONTINUE TO SHIPPING' button.

1.4 Google Shopping ads channel

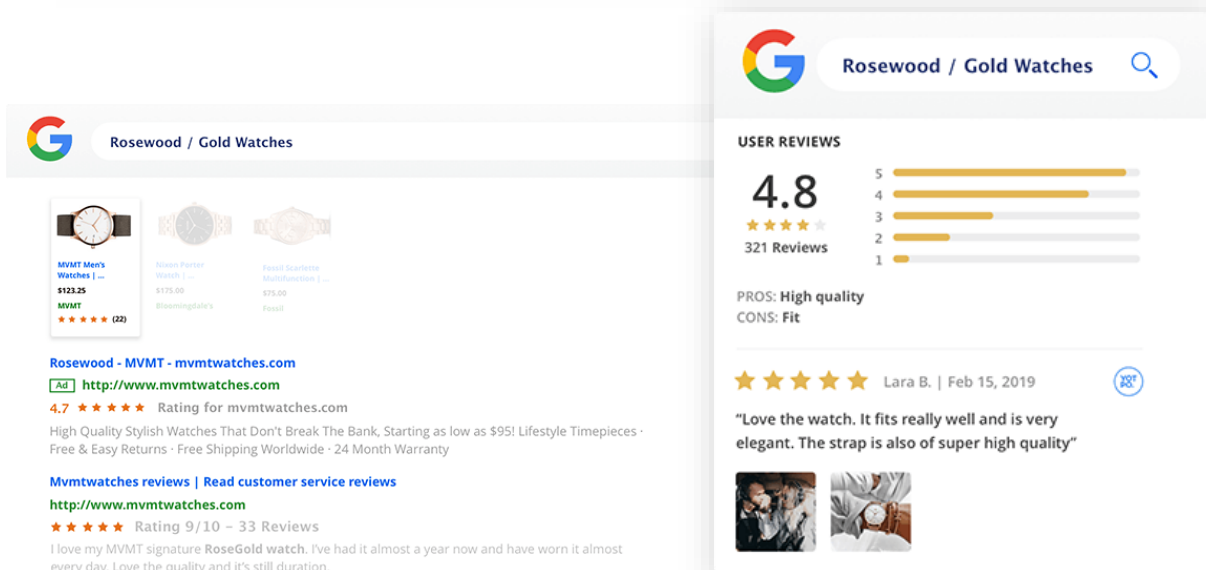
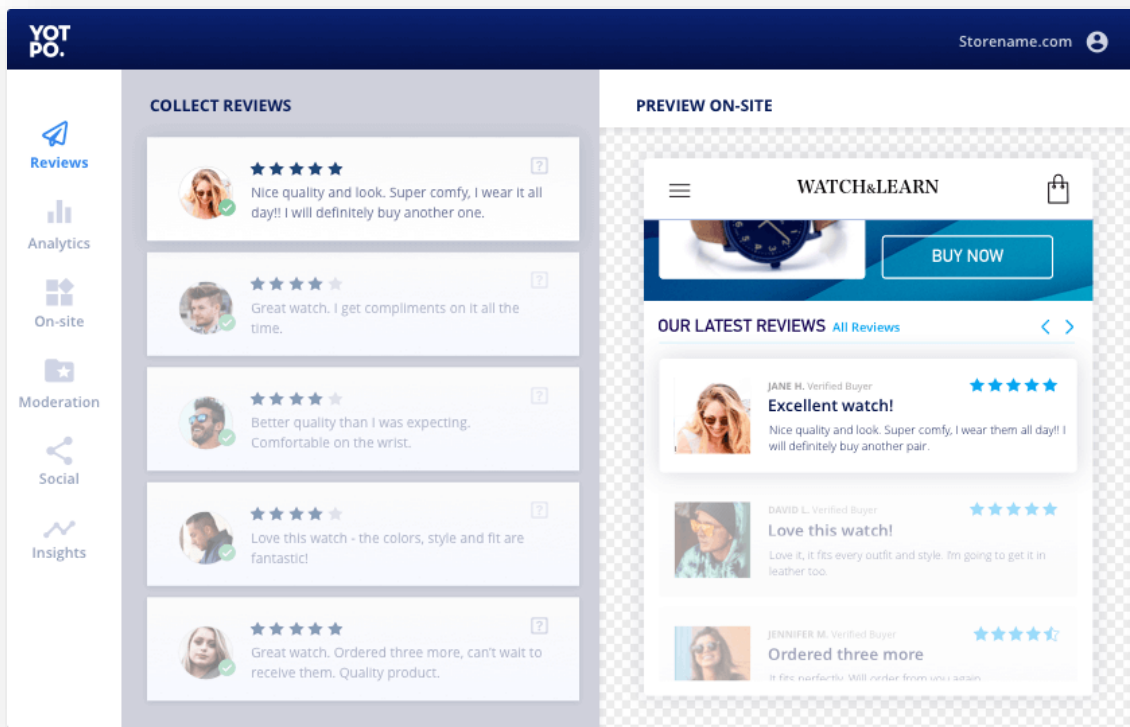
From version 2.3.3 onwards, a separate installation is no longer necessary for merchants wanting to integrate their Google Merchant Center and Ads accounts with their Magento store. The Google Shopping ads channel comes out-of-the-box to help merchants more efficiently advertise and sell products.



1.5 User generated content with Yotpo

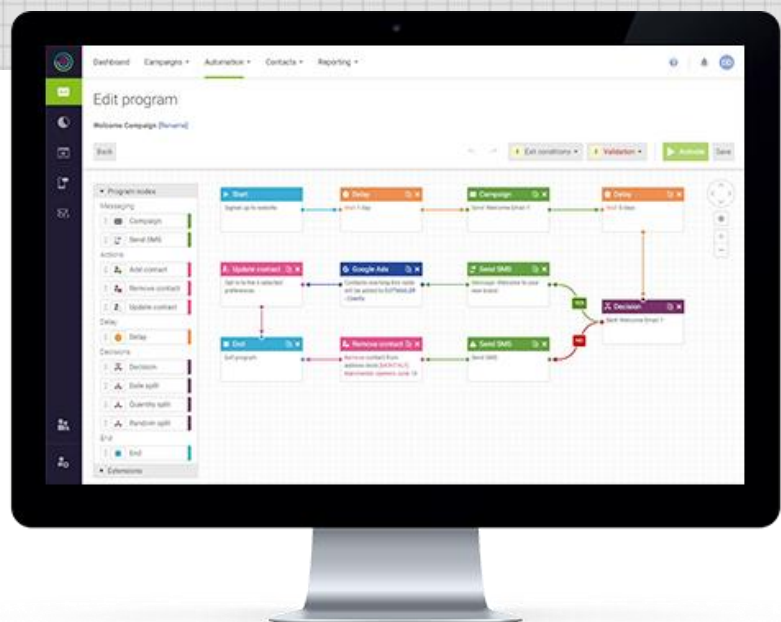
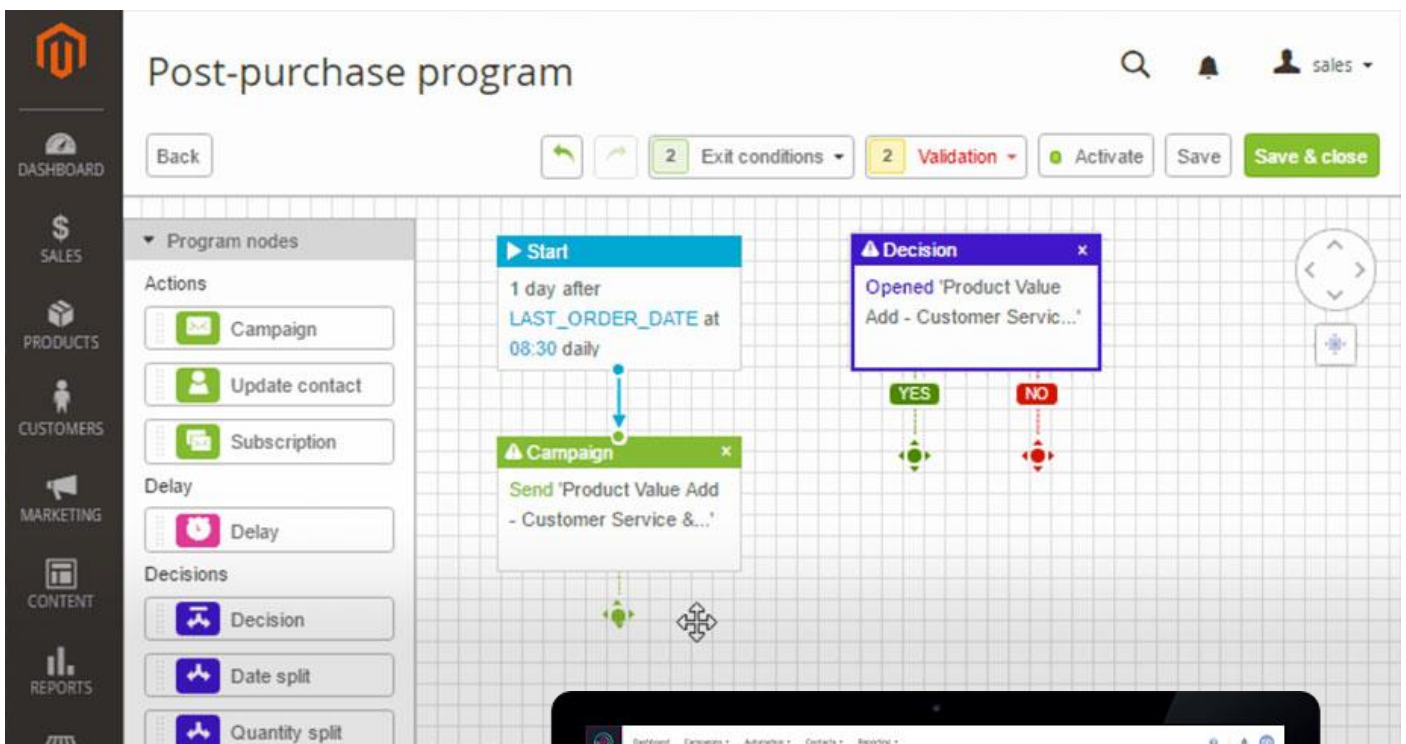
Magento 2.3.3 is the first version to include Yotpo, a platform that allows merchants to gather, curate and manage content generated by their customers. This can include social media posts, images and product reviews that merchants can leverage to boost brand loyalty and trust.

Yotpo also allows merchants to create on-brand loyalty and referral programs to maximise customer lifetime value and aid acquisition.



1.6 Powerful digital 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.

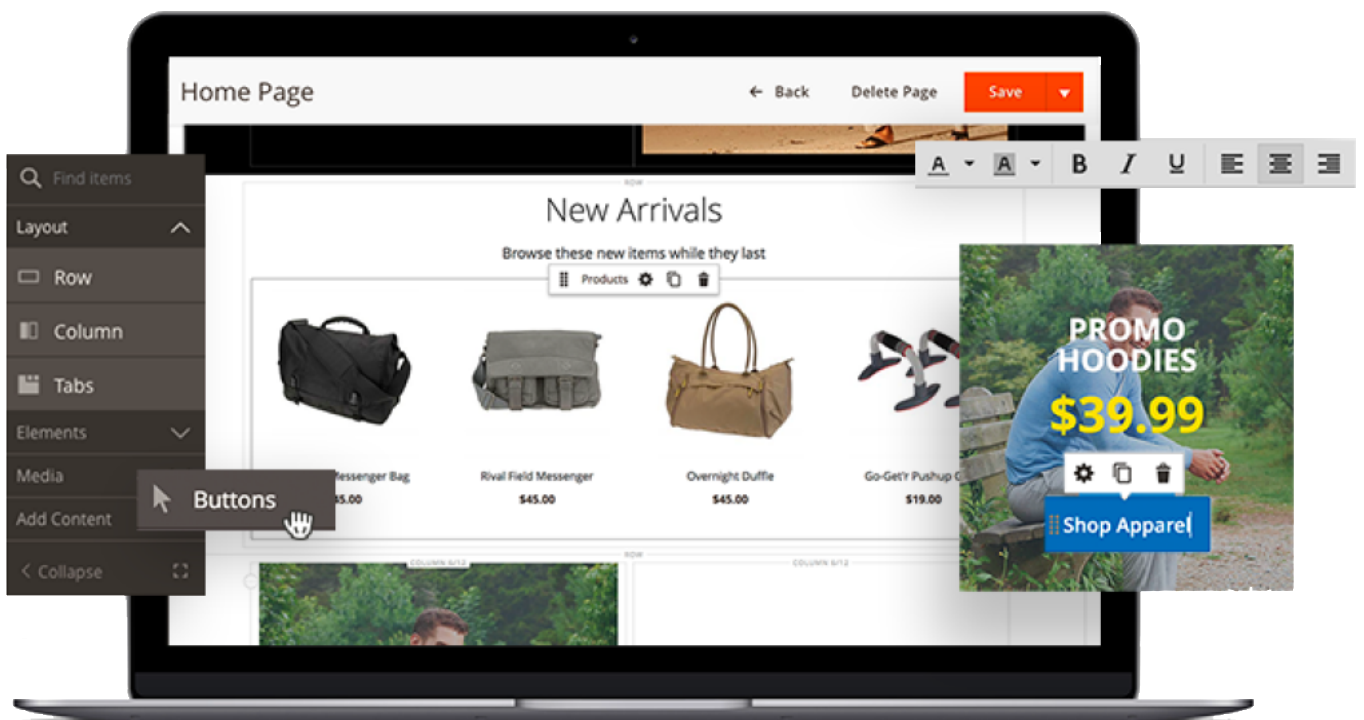


1.7 Easy content management with Page Builder

One major feature in Magento 2.3 is the release of Page Builder in Magento's native CMS. Page Builder adds features such as a 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 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 features a media gallery and widgets so that these assets can easily be integrated within your pages. It can also be used to create your own dynamic content blocks that can be used throughout the site and, with staging and preview functionality, content can be scheduled to go live as and when required.



1.8 PWA Studio

Magento announced PWA Studio in 2019 and it has come a long way since then. PWA Studio enables merchants to deliver better mobile experiences – indirectly boosting the store conversion rates and increasing engagement. This powerful tool now lets developers use standard themes without the need for separate customisation for mobile and web.

A PWA (Progressive Web App) is actually a website that functions as a mobile app. Building your site this way eliminates the need for developing native mobile apps for all the different mobile devices. Rather, a single app functions both as a mobile app and a website. The layout is different as per the requirements of setting up the front-end to the screen size. It also allows caching of data so the website/app continues to function in offline mode.

PWA Studio also speeds time-to-market 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.

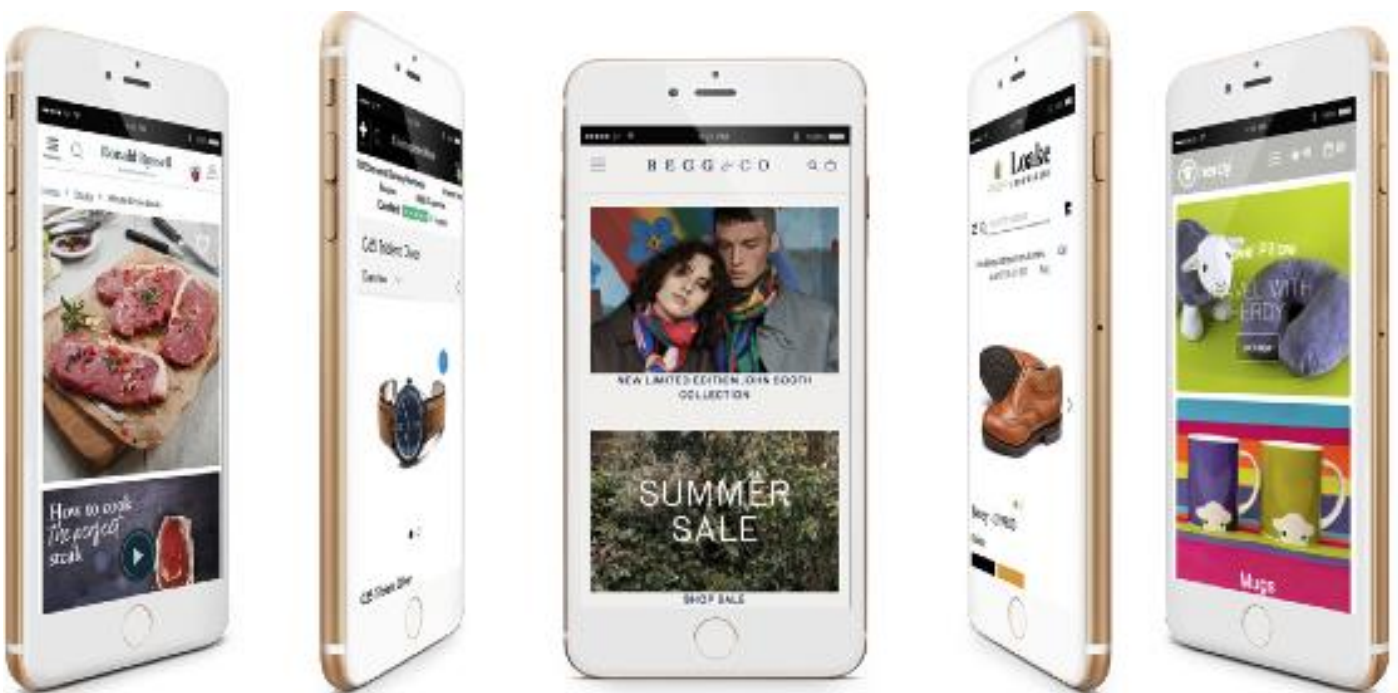


1.9 Performance improvements

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.

In addition:

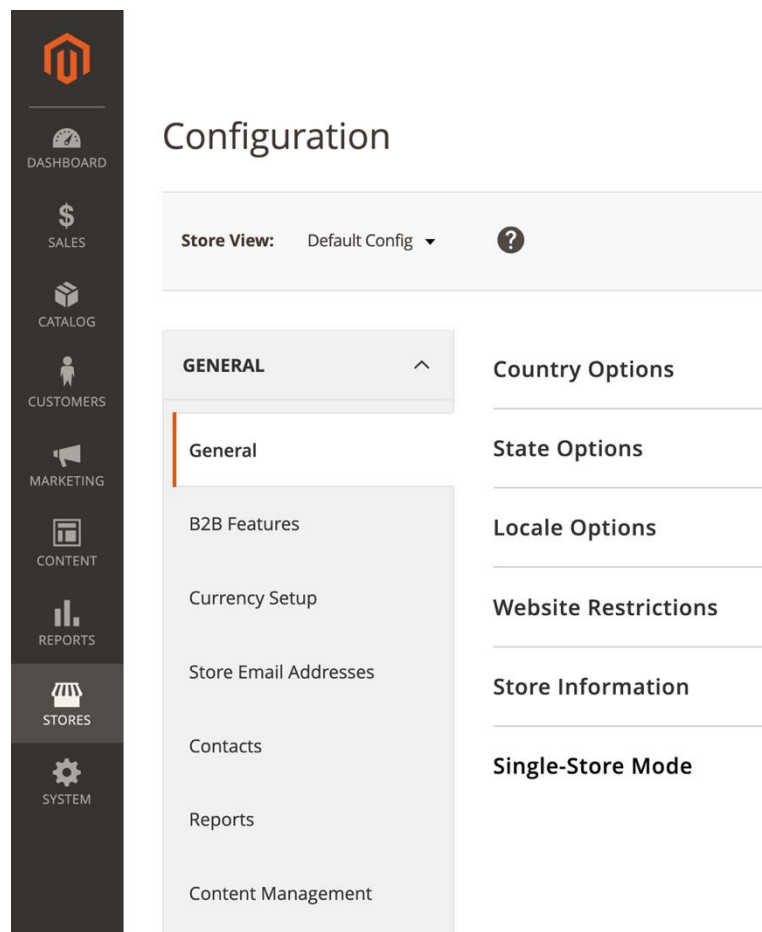
- On the server side, there is a very welcome improvement - the ability to use Varnish caching out-of-the-box, so third-party modules are no longer required. Full Page Cache is also supported.
- Magento 2 has minimised and bundled JavaScript. This reduces unnecessary browser operations on the client 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.



1.10 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, simple third party content integration (e.g. videos) and static block integration.



1.11 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 user's 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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Fusion Backpack

★★★★☆ 3 Reviews [Add Your Review](#)

£59.00

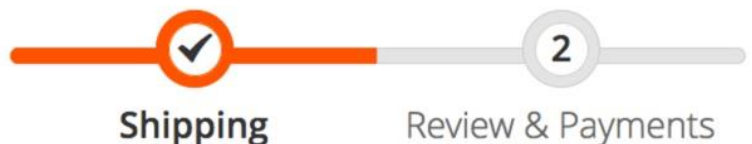
IN STOCK
SKU#: 24-MB02

Qty

1

[Add to Cart](#)

[ADD TO WISH LIST](#) [ADD TO COMPARE](#) [EMAIL](#)



Shipping Address

1.12 Security enhancements

- More secure and robust admin and customer password management including:-
 - 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
- Version 2.3.3 supports PHP 7.3.x and Varnish 6.2.0



1.13 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 out-of-the-box



1.14 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.

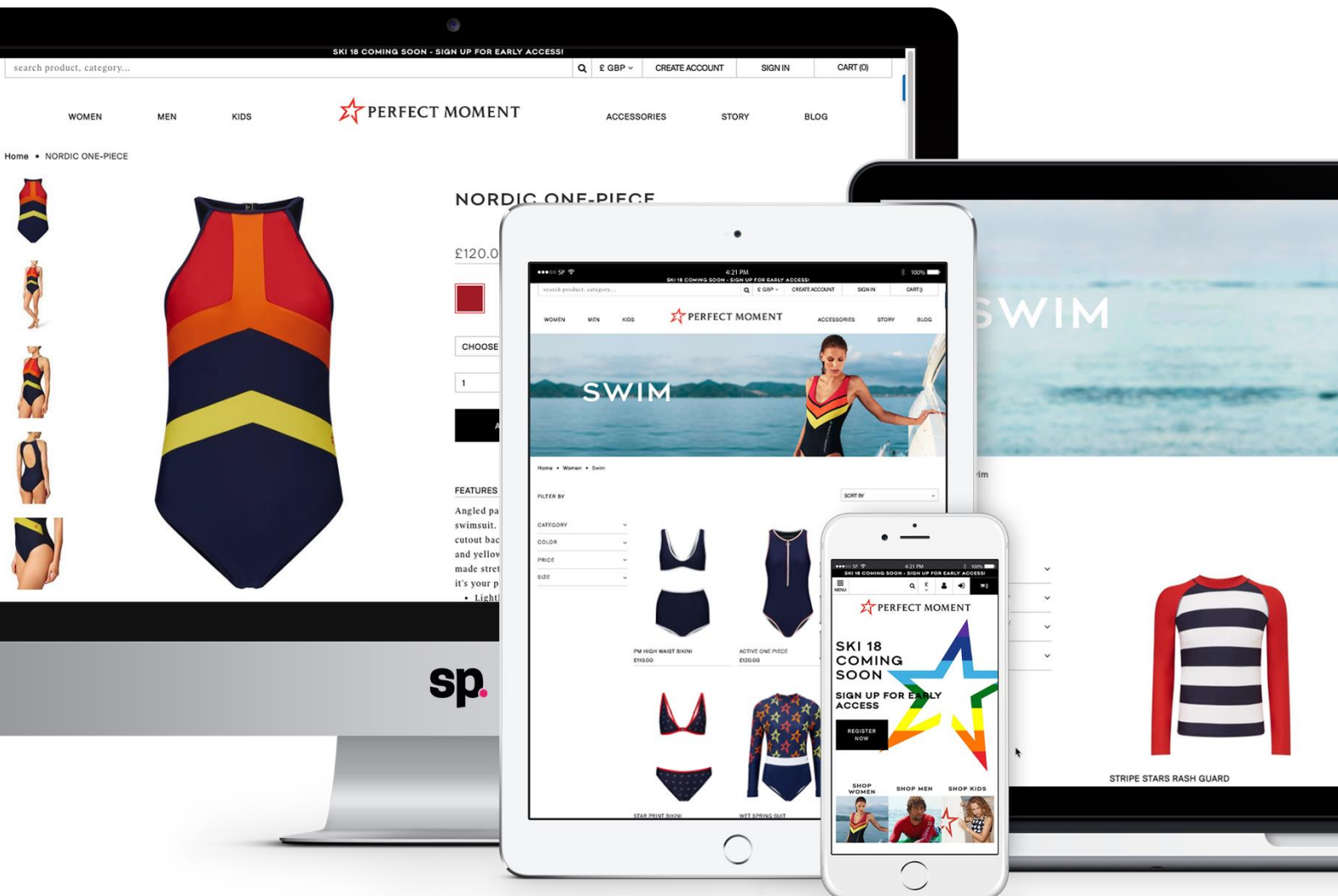


2. Planning your M2 build

With many merchants, the process often starts with a 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 or more years ago.

Why, what 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.



2.1 How should it be done?

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 other 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-back-end, 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 running your current website, while getting the content into shape for the new website and working out how to deal with entirely new functionality?

2.2 Vet third-party extensions carefully

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 would 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 so listen to their recommendations, both positive and negative.



2.3 What about the UX?

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. Listen to their advice about usability. If you are with the right agency, they will have built more websites than you.

2.4 Document your requirements

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

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 and make sure things fit within the scope of what's being delivered. Ask them to write up the specification that you ultimately sign off.

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

The benefit 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 the project you identify new requirements that increase the scope of the build but be wary of "gold plating" things for the sake of it. The overall scope can typically change by about 5-10% and it is possible you will add as many things in as you take out.

2.5 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 Admin Panel - promotions, content blocks, content pages
- Bulk imported into the site using other processes - product & category data / URL re-writes

2.6 Plan and document integration carefully

The integration with your back office:-

- 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.
- Needs to be signed off by you and your third-party system providers just like the designs and functional specification.



2.7 Preparing for testing

Once the site is nearly ready for the testing phase, start planning who you're going to get trained and on what. You can't test something properly if you don't know how to use it.

- 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.

2.8 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 during and just after launch.

2.9 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 any additional new requirements identified during the project and start planning these out into a phase 2 release schedule.
- It's also likely that now the site is in the hands of your customers, more urgent requirements will be identified that need quick resolutions.
- Measure the change in KPIs (increased conversion, etc.) and feed this into driving new initiatives for the site.

3. Conclusion

Migrating from M1 to M2 should be viewed as a huge opportunity for your business but needs to be handled carefully so it is crucial that you choose the right agency to do this with.

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, 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 the time and resources available to help you at this critical time. Call us today to find out how we can help you.





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