

A woman with long brown hair in a braid, wearing black-rimmed glasses and a white t-shirt, is smiling while looking at a laptop screen. The background is a blurred office setting.

# **MAGENTO 2 MIGRATION GUIDE:**

**EVERYTHING YOU NEED TO KNOW**



# BACKGROUND

**The competitive stakes are high when it comes to digital commerce:**

- More than 11% of retail shopping occurs online<sup>1</sup>.
- Mobile devices accounted for 40% of all commerce and 56% of all online searches for retail products<sup>1</sup>.
- 68% of B2B customers prefer to research and order online vs. using a sales rep<sup>1</sup>.

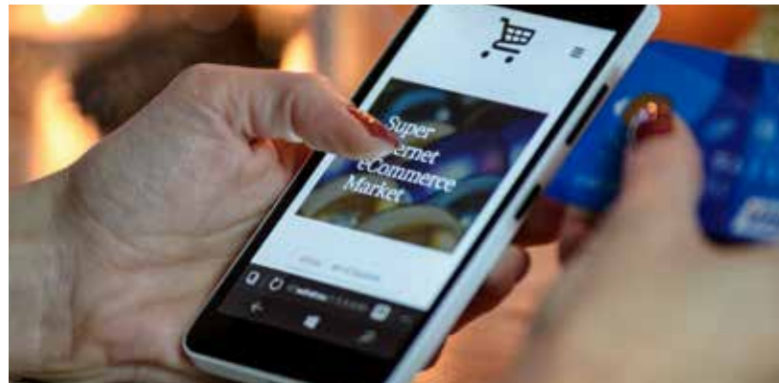
**And the potential is huge:**

- U.S. retail eCommerce sales in 2017 are estimated at \$445 billion<sup>1</sup>.
- Worldwide B2B eCommerce sales are forecasted to reach \$7 trillion by 2020<sup>2</sup>.

With such high stakes and rich opportunity, the time is ripe to ramp up your eCommerce initiatives.

**If you're deciding on whether to upgrade from Magento 1 to Magento 2, the task may seem daunting. However, the benefits of Magento 2 far outweigh any perceived obstacles:**

- Personalized shopping experience
- Faster loading web pages
- Streamlined checkout
- Easy search
- B2B functionality
- All-new, intuitive admin with increased backend operations.



The key to winning in today's competitive eCommerce landscape is to deliver unique and engaging experiences across every touchpoint – making it easy for your customers to complete their transaction.

**MAGENTO 2 DOES JUST THAT.**

# WHY MOVE TO MAGENTO 2?



PERSONALIZATION



EASY SEARCH



FAST CHECKOUT

Magento 2 is not just an upgrade. It's an entirely new eCommerce platform based on 12 years of industry experience, merchant feedback and global community input.

The latest version of Magento Commerce (formerly Enterprise) is a robust platform with a deep native feature set that is well-equipped to grow your online business.



# WHY MOVE TO MAGENTO 2?



## Top 10 Reasons to Move to Magento 2

- 1** Personalized shopping experience that drives sales and return purchases.
- 2** Powerful search instantly serves up targeted results.
- 3** Streamlined checkout decreases checkout time and reduces cart abandonment.
- 4** Responsive design displays and performs seamlessly across any device.
- 5** One-click account creation after placing order encourages checkout and repeat visits.
- 6** Easily set up cross-sells, upsells and bundling to increase AOV.
- 7** Improved backed operations decreases reliance on developers, management time and platform training.
- 8** Full page caching loads pages in 1-2 seconds and improves overall performance.
- 9** Native B2B suite allows for custom catalogs, negotiated pricing and one-click reordering.
- 10** All new, intuitive admin interface.

Support for Magento 1 is ending June 2020 (**official statement**). Migrating to Magento 2 is no longer an option. It's a requirement to keep your site safe and secure for your customers.



# MAGENTO 2. THE LAST ECOMMERCE PLATFORM YOU WILL EVER NEED



**50%**  
FASTER  
PAGE LOADS



**38%**  
FASTER  
CHECKOUT



**135K**  
MORE ORDERS







# THE FIVE STEPS OF MIGRATION

1. REVIEW YOUR CURRENT THEME
2. REVIEW YOUR EXTENSIONS & CUSTOM CODE
3. REVIEW YOUR 3<sup>rd</sup> PARTY INTEGRATIONS
4. MIGRATE YOUR DATA
5. QA & LAUNCH

This comprehensive guide provides a general overview of your Migration to Magento 2. It outlines the steps of migration and addresses the pitfalls to keep you on track and on budget.

# BEFORE YOU START: PLAN YOUR MIGRATION

Before any migration begins, you must determine your ideal time to launch. While this may seem like a minor detail, timing your launch is critical to avoid any delays or unnecessary risks.

Start by crossing out your peak season or seasonality within your business. Now work backwards to create a reasonable timeline.

It generally takes 3-7 months, depending on extensions, additions and functionality to complete the migration process and go live.

With your launch date in hand, count back at least five months to determine a start date for your migration. (For example, if your slow season is September, plan to start your migrations in April.)

Once you have your launch date set, you're ready for step one of your migration: **Review Your Current Theme.**



# REVIEW YOUR CURRENT THEME

Because Magento 2 is a completely different platform, you'll need to rebuild your store on a new theme.

To accelerate your time-to-market, Magento includes Luma – a beautiful, fully-customizable theme. Luma is a capable, clean theme that can be modified with your logo, colors, fonts, photos and other branding elements.

At this stage, it's important to review your store design from the user.

## Ask yourself these questions:

- What features are never used or may be confusing my customers?
- Where am I losing customers in the sales funnel?
- How are my customers searching for products?
- What info do my customers want to see on product pages?
- How do customers use filters to view products?

## Next, evaluate your store as the business owner:

- What are your key Unique Selling Propositions (USPs) and are they being displayed effectively?
- What do you like about your store?
- What do you wish you could change?
- What new features do you want to add?
- What pages are your highest entry pages and how can you reduce the bounce rate?
- Are you effectively using real estate for up-sell and cross-sells opportunities?



Don't rush this step. Although you may want to dive head-first into design... don't. Take your time to evaluate your current site. If you have years of web performance data, use it. Analyse it. Build on it. Use this hindsight as foresight to create a better performing website.



# REVIEW YOUR EXTENSIONS & CUSTOM CODE

**Take time to evaluate your extensions.**

Which ones are you using?

Which ones are outdated or no longer functional?

Which ones are affecting performance?

As we guide you through the migration, we can help identify which extensions need to be upgraded.

Many extensions can be replaced with native Magento 2 features, including:

- ◆ Two-step checkout
- ◆ Product attachments
- ◆ Elasticsearch
- ◆ Amazon Pay
- ◆ Drag-and-drop page builder
- ◆ B2B functionality

To simplify future upgrades, install only the extensions that are required for your business.



## REVIEW YOUR EXTENSIONS & CUSTOM CODE

When you access the extensions in the Magento 2 Marketplace, you're receiving a triple benefit:

- 1 Expedited migration process when you replace customizations.
- 2 Reduced cost since developers no longer have to maintain custom code.
- 3 Added security knowing the Marketplace is a vetted forum.



**A final word:** There are no official tools available for migrating Magento 1 extensions to Magento 2.

You must either replace your current extension with a Magento 2 version or use native Magento 2 functionality.

### REVIEW YOUR CUSTOM CODE

In most cases, the custom code written for your Magento 1 store should be compatible with Magento 2. However, since Magento 2's platform is structurally different, additional coding may be required.

This is not a complicated process, but is necessary to ensure your custom code integrates successfully with your new Magento 2 platform.

Our team of Magento certified developers can help determine if your custom code is compatible and what additional code, if any, needs to be written. They have successfully replatformed many sites to Magento 2 and know what to look for.



Be intensely selective when choosing which extensions to keep. Excess extensions can cause bloat and slow your site. Being vigilant at this stage will save you countless hours and dollars further down the road in your migration to Magento 2.

## REVIEW YOUR 3<sup>rd</sup> PARTY SYSTEM INTEGRATIONS

Identifying your third-party system integrations, such as order management system (OMS), customer relationship management (CRM), enterprise resource planning (ERP), point-of-sale (POS), product information management (PIM) - party logistics (3PL) are crucial.

These systems hold important data and their proper integration to your eCommerce platform is critical to the performance of your site.

Without compatible integration, your new website could lack key data points,

- ◆ Shipping information
- ◆ Order information
- ◆ Product information
- ◆ Customer information
- ◆ Price updates
- ◆ Out-of-stock notifications

Integration is key to a user-friendly website, as well as maintaining efficiency and control over your back-end operations.

It ensures you ship the right items and hit your guaranteed delivery dates. It gives you more control over new promotions or flash sales while keeping the data synced for accounting purposes. You'll resolve any inventory issues and avoid overselling.

Most importantly, you'll save your team time and get them back to focusing on growth strategies instead of finding workarounds.



## REVIEW YOUR 3<sup>rd</sup> PARTY SYSTEM INTEGRATIONS

Before moving to the next step in your migration, make sure you answer these questions:

- 1 What systems does my site need to integrate with?
- 2 What data flows do I want to automate between my systems?
- 3 Can I leverage my existing connectors to connect with Magento 2?
- 4 Do I need to add any new capabilities through integration to improve business processes or customer experience?

When evaluating your eCommerce integration needs, speak with your development team or agency for recommendations and best practices. For complex integrations, we work with a number of partners such as nChannel, Celigo, and eBridge to meet your needs.

Magento can easily integrate with nearly any 3<sup>rd</sup> party integrations, including:

**BRIGHTPEARL**

**DYDACOMP**

**EPICOR**

**INFOR**

**MS DYNAMICS**

**MS NAV**

**NetSuite**

**QuickBooks**

**SAGE**

**SAP**

**Amazon**

**eBay**

**Dotdigital**

**Klaviyo**

**Mailchimp**

**Constant Contact**

**Listrak**

**Bronto**



Take the time to create a list with your development team or agency to ensure all 3<sup>rd</sup> party system and integrations are accounted for. If some are overlooked or ignored, your overall customer experience can be compromised.

## MIGRATE YOUR DATA

The last step in your migration is to move your Magento 1 data, including customers, orders, products, categories and configurations and settings to Magento 2.

Please keep in mind, this data migration is a time-intensive process. It's not a simple CSV export from Magento 1 and then import into Magento 2.

There are multiple steps. Massive amounts of data being are being inputted and mapped. In addition, intense A/B testing is performed to ensure a smooth transition and your new store functions properly.

At every stage, extreme care is used to assure that your data is not compromised by any conflict on Magento 2.

Throughout this process, the data is mapped and cleaned up.

### The migration of your data typically follows a 5 five-step process:

- 1** The Magento 1 database is cleaned up. This includes:
  - Removal of unused customer, order, or product attributes.
  - Fixing database issues such as unlinking child's or missing constraint registries.
  - Attributes must then be mapped in order to be migrated, taking into account extra tables that have a direct relation to customers (e.g., Wishlist), catalog (e.g., reviews) and sales (e.g., invoices).
- 2** A clean migration of product, customer and order information is done. Customers will then have access to their information.
- 3** After every necessary extension from Magento 1 (that directly affects customer, catalog or sales information) is installed in Magento 2, the data needs to be migrated again by including and mapping those attributes.
- 4** A delta process is then set to keep the information up to date.
- 5** The final migration is done once more before the site is launched.



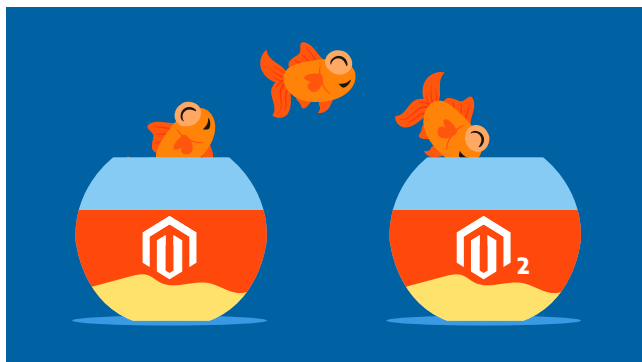
# MIGRATE YOUR DATA

## Customer Migration

Customer migration allows your customers to log into the new site and still have all their account information and passwords already saved – allowing for a seamless transition.

To ensure all customer data is migrated intact, we:

- ◆ Verify consistency between the database structures (tables and fields) of Magento 1 and 2.
- ◆ Track the data migration status and create log files.
- ◆ Executes data verification tests.



## Order Migration

Order migration allows your admin and customers to see all previous orders as well as orders that need to be fulfilled. All orders are matched with their corresponding customer.

## Catalog Migration

Catalog migration will pull all the product information and images into the new site. The complete category tree is migrated to Magento 2 and then reviewed to ensure it matches the tree from your previous site.

All product information is migrated to the new platform, including:

- |                           |                          |
|---------------------------|--------------------------|
| ◆ Product name            | ◆ Prices/special prices  |
| ◆ Product description     | ◆ Images (including      |
| ◆ Categories the products | thumbnails and swatches) |
| belong to                 |                          |

## MIGRATE YOUR DATA

### CMS Migration

The final phase of your data migration is to move all CMS pages and CMS blocks from Magento 1 to Magento 2.

This is typically done in a four-step process:

- 1 The Magento 1 database is cleaned up. This includes removal of any unused or inactive CMS pages and blocks.
- 2 A clean migration of blocks, pages and widgets is performed.
- 3 Because Magento 1 and Magento 2 have a different XML format for layout, any CMS content with custom layout updates must be fixed manually.
- 4 The final migration is done again before the site is launched.



## QA & LAUNCH

The final step of your migration is a thorough QA process culminating with the launch of your site:

**Internal QA:** When your migration is completed, a final QA is done across the entire site. Your site will be tested on the latest version of all major browsers to ensure a consistent look regardless of the user's browser.

**Testing and QA:** Performed on Windows and Mac desktops and across multiple devices, including the most current Apple and Samsung devices to ensure your site displays accurately and performs flawlessly.

**Client QA:** Before your site goes live, you will have the opportunity to test out a fully-functional website. You will be given plenty of time to properly review your website to ensure everything is in order and as you expected.

**Client sign off:** With your approval, we will choose a launch date. Typically, we don't launch on Fridays since any issues would have to wait to be resolved till Monday. We also don't launch on Mondays due to the higher internal workload after the weekend. Tuesdays are our preferred launch days.

**Launch:** A dedicated video line will be set up between your client advocate and yourself throughout the launch so that you have full access to our team. Throughout the launch, you will receive updates every 15 minutes until the launch is complete.



Immediately post launch, our QA team will test all essential processes such as checkout, site navigation and the home page to ensure that nothing changed during the launch process. Once this checks out we'll confirm with you that the site is good to go.



# CATALOG EVALUATION

Have you defined and entered all your attributes?

Have you capitalized on setting up related products?

Can you bundle products?

Are you taking advantage of up-selling and cross-selling?

How's your taxonomy?

These questions can help you make the most of your catalog. Plus, making modifications during the migration process is far easier than once your site is live.

Magento 2 has a flexible catalog with both direct navigation and flexible navigation to improve the user experience of how products are found, in addition to the native Elasticsearch.

## The core catalog management allows you to:

- ◆ Define unlimited product attributes.
- ◆ Create simple, configurable, bundled, and grouped products.
- ◆ Include downloadable/digital products and product samples.
- ◆ Mass-assign a value to multiple products for batch updates.
- ◆ Efficiently batch import and export catalog information at scheduled times.
- ◆ Create predefined product templates to quickly set up new products with a specific set of attributes.
- ◆ Automatically assign products to specific categories based on their attributes.
- ◆ Receive notifications when inventory needs to be replenished.
- ◆ Choose out-of-stock messaging and display options.
- ◆ Moderate reviews and product tags.

# NEW FUNCTIONALITY


**Migrating is the perfect time to introduce new functionality.**

Your store will need to be rebuilt on the new Magento platform.  
That's a good thing.

It's a rare opportunity to take stock of your current website and add the functionality you've always wanted to.

Take advantage of it. Review your wish list of site features. Look at your competitor's sites to get ideas for new functionality.

In fact, Magento 2 has many native features that may already satisfy the functionality you want to include:

- 
- Visual merchandising.
  - Personalized content, promotions, and pricing.
  - Content staging and preview environment.
  - New business models, including subscriptions and services.
  - Enhanced search with Elasticsearch.
  - Advanced payment options.
  - Manage multiple B2B and B2C sites from one interface.
  - Amazon Pay.
  - 2-step checkout.
  - 1-click reorders.
  - Store credit for returns and gift card balances.
  - Virtual and physical gift cards.



# **SEARCH ENGINE OPTIMIZATION (SEO)**

## **An essential role of migration**

Replatforming and changing servers are both factors which can impact SEO. If new old URLs are not directed to the new pages, you could lose ranking. Google may even penalize you by removing pages from search results and it will take time before your pages are re-indexed.

We have partnered with ROI Revolution, a leader in SEO, to oversee your migration, provide guidance and safeguard your rankings you've worked so hard to achieve.



# **SEARCH ENGINE OPTIMIZATION (SEO)**

ROI SEO services include:

- Identification of “core URLs” for a successful domain migration.
- Analyzing each backlink index (including Moz, Majestic, Ahrefs and SEMRush) to identify any URLs that are recipients of backlinks. All linking pages listed in Google Search Console are also crawled to determine link destination.
- Up to 30,000 keyword ranking results are reviewed to determine what pages are currently ranking and driving organic traffic.
- Full list of core URLs compiled and delivered.
- After redirect destinations are determined and implemented on the development site, ROI will crawl the site to confirm redirects are properly set up.
- Once new site goes live, ROI will crawl the site again to confirm redirects are still properly setup.
- An updated sitemap is submitted to Google post migration

ROI Revolution is offering their SEO services at a discounted rate for 121eCommerce clients. Your client advocate can discuss service packages and pricing.

Magento 2 is SEO friendly and gives you the ability to:

- Automatically generate a Google sitemap
- Create search engine friendly URLs
- Take full control of URLs with URL rewrites
- Enable detailed search results by automatically adding structured data markup to product pages



# HOSTING

Although often overlooked, hosting is a critical factor when migrating from to Magento 2. While your hosting provider may have served you well on your Magento 1 website, a Magento 2 website has an entirely different set of technical requirements. And staying with your current hosting provider may actually do you more harm than good.

We've partnered with Jetrails, a leading hosting provider specializing in Magento 2 websites. They've taken the time to prepare some insider advice on choosing hosting providers during your migration.



# HOSTING

As a best practice, it's recommended to replace your Magento 1 hosting account with a hosting provider that specializes in Magento 2.

## Four Reasons to Leave Your Magento 1 Hosting Behind:

- 1 Your Magento 1 hosting account is not configured or optimized for Magento 2.** Magento 2 has unique hosting software requirements, such as Composer and additional PHP extensions. Magento 2 is also built to run in a more modern hosting environment with newer versions of MySQL, PHP, and other server software. For a successful launch and strong performance, such as fast loading speeds, you'll want a hosting environment that's tailored to your Magento 2 website.
- 2 Your server software isn't up-to-date:** If you're on an old version of Linux, PHP, or other required server software, you may be suffering from speed and security issues. Rather than try to make your Magento 1 site compatible with these updates, it's safer and easier to simply launch your M2 site in a fresh environment.
- 3 You don't want to bring along baggage:** Your Magento 1 site has probably been live for a few years. What's actually lurking in its hosting account may be questionable. Leave the clutter behind and start fresh with an account where you're not worried about who had access three years ago, and what those strange files are doing in the root directory.
- 4 Your hardware may be outdated:** If you're on a server that's using conventional spinning hard disks instead of solid state drives, you're going to be bottlenecking your site. This is your chance to move to a newer, faster environment.

# HOSTING

## Some important hosting dates to watch out for:



### December 31st, 2018:

This is the date that **PHP 5.6 end of life**. This software deprecation means that there won't be new security patches for PHP 5.x. You'll have to upgrade to PHP 7.x, or you can expect your hosting account to wind up with known security holes, which is a huge risk for an eCommerce merchant.



### November 30th, 2020:

**CentOS 6 end of life.** If your current hosting account is using the CentOS 6.x operating system, you'll want to upgrade to avoid taking on the risks of known security holes which you won't receive software patches for.

When upgrading any hosting software, it's crucial to go through proper User Acceptance Testing (UAT) to ensure your Magento site works properly after any updates.

Jetrails offers the hosting stability your Magento 2 store demands. They are experts in security, scalability, reliability, and speed, offering fully-managed dedicated servers and AWS hosting solutions. Jetrails is offering their hosting services at a discounted rate for 121eCommerce clients.

>jetrails\_



# MAGENTO 2 MIGRATION CHECKLIST

- ✓ Make a full backup of your Magento 1 store including all files, folders, and the database.
- ✓ Create a clone of your Magento 1 store. Do not use the live store for the migration process.
- ✓ Check whether your current theme(s), extensions and custom code are compatible with the Magento 2.
- ✓ Migrate the data from the cloned database of your Magento 1 store.
- ✓ Remove outdated and useless data from the database. This includes logs, recently viewed products, compared products, etc.

## QUESTIONS TO ASK YOUR DEVELOPER BEFORE MIGRATING

- |  |   |
|--|---|
| <b>1</b> Are you a Certified Magento solutions partner?  | <b>8</b> Have you delivered migrations within budget?                   |
| <b>2</b> Are your developers Magento 2 trained and certified?                                      | <b>9</b> Will you be able to connect my current backend to my new site? |
| <b>3</b> What is the average timeline of your previous migrations?                                 | <b>10</b> What are some sites you have migrated from M1 to M2?          |
| <b>4</b> How do you monitor and control projects to keep them from going over schedule and budget? |   |
| <b>5</b> What does your reporting look like?   |   |
| <b>6</b> What is your communication protocol?  |   |
| <b>7</b> What is your internal structure?  |   |



## TAKE THE NEXT STEP

With a deep-rooted experience in Magento 2, we have successfully moved over dozens of sites from Magento 1 to Magento 2. On time. And on budget.

Our team includes Magento 2 Certified Solution Specialists, sound web development, gifted designers and a command of eCommerce best practices to guide you throughout your migration to Magento 2.

**Take the next step.**

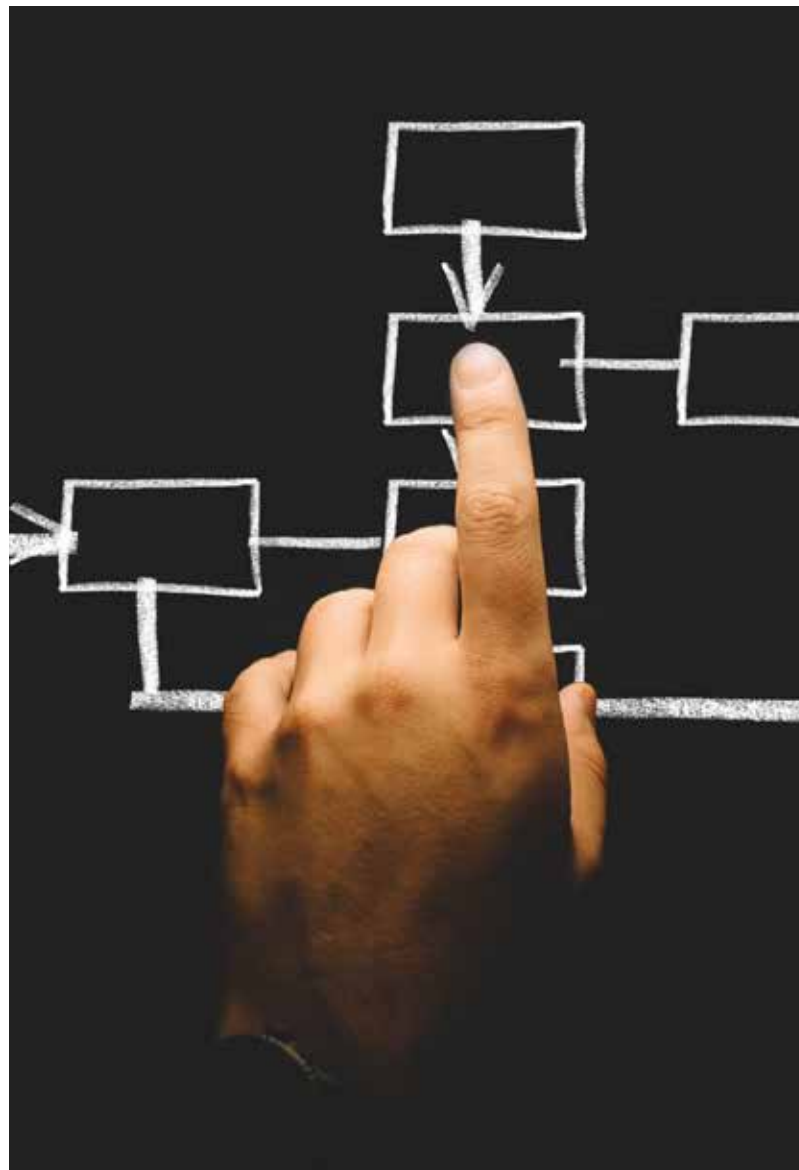
**Contact us to schedule your 15 minute discovery call to discuss your migration needs.**

**216.586.6656**

**121ecommerce.com**

### SOURCES:

- 1** US E-commerce sales grow 15.6%," Internet Retailer, 2017
- 2** Hitwise
- 3** "Death of (B2B) Salesman: Two Years Later," Forrester, 2017





Contact us for an initial discovery call to discuss your migration.



[info@121ecommerce.com](mailto:info@121ecommerce.com)



216.586.6656



[www.121ecommerce.com](http://www.121ecommerce.com)

