

Magento®

Migration Checklist

eCommerce Platform Guidebook

| Changing eCommerce platform

Changing eCommerce platform is always stressful. It is important that the new store should work as good as, or even better than the current one. After the change, the store should not fall in search results. First of all, we have to move all the content, the products, and synchronize the store with the stock and accounting systems. The list of activities to be performed while changing the platform from SaaS software to a dedicated platform, or the other way round, is basically the same.

We have gathered crucial information about how to prepare for the big day in the form of a checklist of things to do. The list conveys the crucial elements to be remembered by the person responsible for the migration of the platform.

However, the list does not convey the very technical activities connected with data and graphical design migration because such activities should stay on the side of the implementation company, responsible for migration. The aim of the list is to verify that the activities have been appropriately performed. On the other hand, the list conveys a series of things to be remembered individually by the person responsible, such as changes in the content.

[Help me prepare for Migration](#)

1. Tests

Testing an Internet store before its official launch should last at least a couple of days so that all the important aspects of the software are checked and we are sure that everything works fine after it has gone live.

1. Has the store been tested and accepted? Do the acceptance conditions allow for launching a new version?

Launching a store without testing it is a little bit like living in a house without its technical quality having been checked. It seems that everything is OK until someone gets hurt. First of all, a store should undergo functional tests. The new platform will probably work differently than the old one. Do all the front-end links work? Does the shopping path work right and not confuse the users? Does the administration panel allow the operators to manage the orders? Do all the integrations work fine?

2. Is the platform secured?

This question is especially important when we change to a dedicated or an open-source solution. Security tests of the information systems being launched are a standard procedure. It is especially important when it comes to eCommerce where a personal data leak or impersonating a client can bring tragic consequences. What kind of guarantee do we have from the platform providers? Have we made sure our clients are safe? Has the data been encrypted and the storage secured?

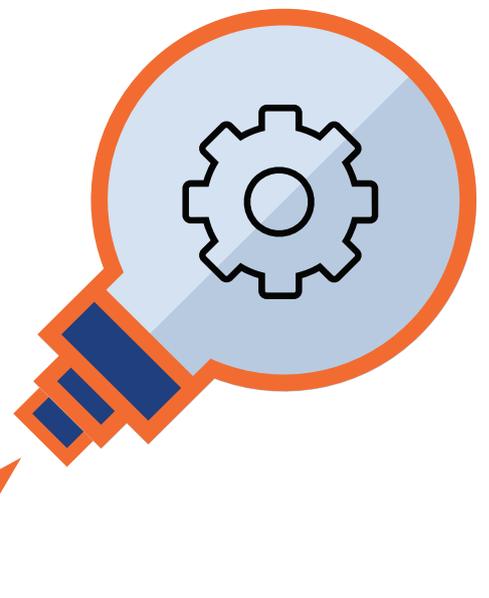
1. Tests

3. Is the platform efficient?

According to official declarations from eCommerce platform providers, any eCommerce platform is efficient, flexible and scalable. However, we should perform the tests ourselves anyway or receive test results. The conclusion from the tests should show that the platform works at least as quick as the previous version of the store.

4. Does it look good in spite of the browser used?

Do all the screens of the store look good in all the popular browsers – i.e. at least Internet Explorer ≥ 8 , Firefox, Chrome, Safari? Are the graphic designs and text formatting well-migrated and do they look good?



2. A catalogue of products

1. Have all the products, descriptions and pictures been migrated?

It seems obvious but it is necessary to verify it. Has the proper formatting of the descriptions been saved? Are the proportions of the photos still ok (on the lists and product cards)? Is the information about product availability visible?

2. Have the connected products, cross-selling and promotions been migrated?

A new store should preserve the previously present connections between products. Pay attention to whether this data has been transferred automatically since a manual update between hundreds of products can be very time-consuming.

3. Have all the categories and their appearance been preserved?

A tree of categories is the key for accurate functioning of the store and managing a catalogue of products. Make sure that the links to categories have not been shortened and that their descriptions have been transferred. Are the breadcrumbs and navigation options left intact? See if the connections between products and categories have not been lost.

3. Static content

1. Have the static pages been transferred?

Pages such as “Terms of use”, “Delivery”, “Product availability” and “Payment and delivery methods” usually have to be transferred manually by the store’s operator. Have the internal text links been updated? Is the formatting OK? Are all the pictures and photos displayed properly?

2. Has the correct contact data been set?

Check the store’s e-mail address, contact telephone numbers, the address of the main HQ and the bank account number. This information is necessary for the users to be able to shop in your store. Usually, it has to be manually set by the operator during the store’s configuration. It is crucial to make sure there is no test or example data in any spot in the service.

3. Are the e-mail templates consistent with the store’s graphic design?

Often, especially in SaaS platforms, the store gets equipped with ready-made, standard e-mail templates. Remember that transactional e-mails (e.g. order confirmation, etc.) constitute your professional image and are received by all your clients. Make sure that their formatting is OK by sending test transactional e-mails. Do they have the proper address data? Do they have the current logotype and design consistent with the store’s layout?

4. Have the advertising boards and banners been adjusted to the new layout?

The majority of stores use a banner mechanism to display proper boards on category subpages, product cards or as a slider on the homepage. Have the boards been adjusted to the new layout by a graphic designer? Are the boards displayed properly? Are there no elements missing?

4. Search Engine Optimization

1. Is the store still available via browsers?

Changing an e-store's software is usually followed by a change of URL address structure. Old addresses will no longer be indexed by the browsers and it takes a while until the new structure gets indexed. All the links going directly to our store's subpages will stop working as well. A simple solution to this is to use a generated map of redirections (HTTP 301) from the old addresses to the new ones. Such a solution can be fully implemented by the new platform and there should be no excuse for not using it.

2. Is the template cut according to SEO good practices?

Has the code structure been well-thought out and adjusted (headlines, paragraphs, lists, etc.)? Do the photos have descriptions `alt=""` and the links `title=""`?

3. Have the descriptions been well-defined and have the titles of the pages remained unchanged?

The titles of the pages are generated automatically – similarly to the meta-tags. Make sure that the new values are in accordance with your SEO strategy – if not, there should be changes introduced.

4. Have the descriptions been well-defined and have the titles of the pages remained unchanged?

If you have Google Search Console or other, similar tools installed and you use sitemaps – check whether the site's map is being refreshed and if it has the correct data.

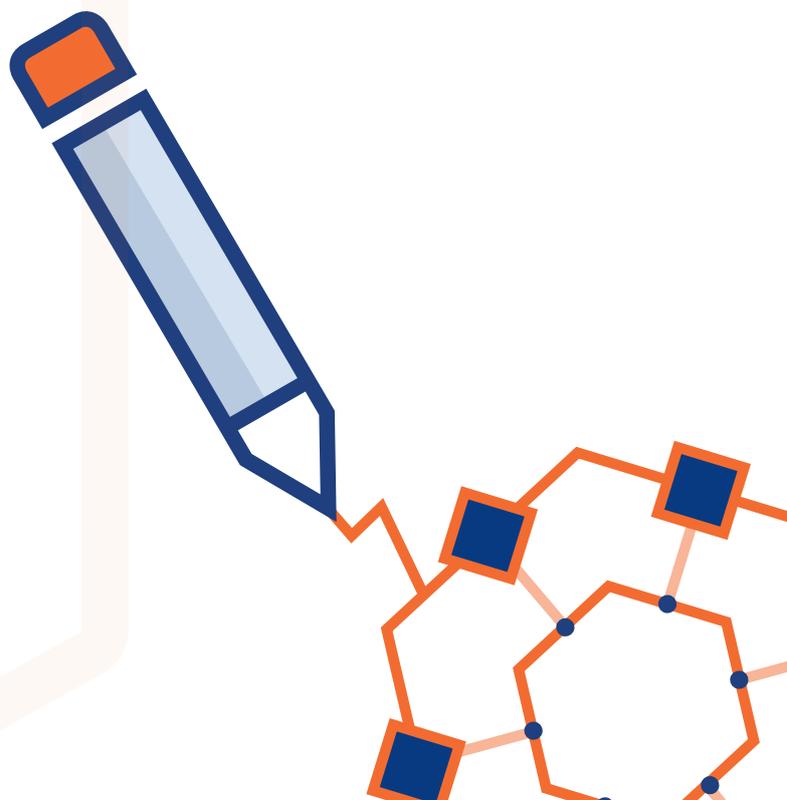
5. Payment and delivery methods

1. Are the delivery methods and their prices OK?

Usually, delivery methods are not migrated automatically and they have to be configured manually. Are the terms (e.g method of payment, price) set properly? Are the different costs of delivery methods OK? Has the free delivery been included if it used to be present in the previous version?

2. Are the payment methods and their prices OK?

Methods of payment, similarly to the methods of delivery, have to be always verified. Does the integration with electronic payments work? Has it been tested via test payment? Have the operator's settings been updated so that they direct to the new service (changing URL addresses)?



6. Integrations

1. Has the integration with the stock program been tested?

Is the store updated with the current stock numbers and product availability? Are the trade indexes during synchronization OK?

2. Has the integration of orders with contractors' data been verified?

Does the FK system use the same identification as the store? See if the change has not caused any conflicts. Do the orders go to the accounting system and is the status of each order updated in the store?

3. Are the conversion tracking and analytic codes (Google Analytics and others) entered?

For sure we don't want conversion and sales measurement to be done differently in the new store compared with the previous one. Our measurements have to be consistent and comparable. Inserting a code is something so easy that you tend to forget about it. It is worth checking it with an Analytics/AdWords specialist.

7. E-mail, domain, SSL certificate

1. Has the domain been properly delegated in DNS?

Has the domain been properly redirected to the new server, once the tests and other works connected with launching the service have been finished? DNS propagation can last up to a few hours, depending on many factors. It is necessary to check earlier whether the domain has been redirected properly (e.g. by modifying the local DNS) – so as to avoid a situation when a domain directs to nowhere after propagation. This will mean waiting another couple of hours, during which the store would be unavailable.

2. Have the e-mail settings been maintained?

If the platform does not give access to e-mail, we have to host mail on our own server. You can use Google Apps or any other provider. However, it is important to properly set the MX records responsible for mail delivery, while transferring the domain. You should point that to your software provider or your administrator. It is also necessary to perform tests after DNS propagation but before the very launch – to see if the e-mails get in and if there are no problems with receiving them.

3. Has the SSL certificate been migrated and properly connected?

SSL is the basis of security in today's stores and it is hard to run a serious e-store without this encryption. If you already have an SSL certificate, you should ask your administrator to send the proper files - with the certificate - to the new provider so as to install them on the new platform. If not – you should buy an SSL certificate and pass it on for installation. It is crucial to check whether the new store is doing OK with SSL, especially on screens such as Cart, Your account, Changing password and others that demand sensitive data from the user.

8. Legal accuracy

1. Has the data collection of the store been submitted to an institution responsible for personal data protection?

A new platform usually means new servers and data hosting. Make sure it meets the requirements of personal data protection. The data collection should be submitted to a proper institution with explanations as to the types of security arrangements used in the service. You should ask the provider of the service for help because the provider knows best what the technical parameters are and what the hosting environment is like.

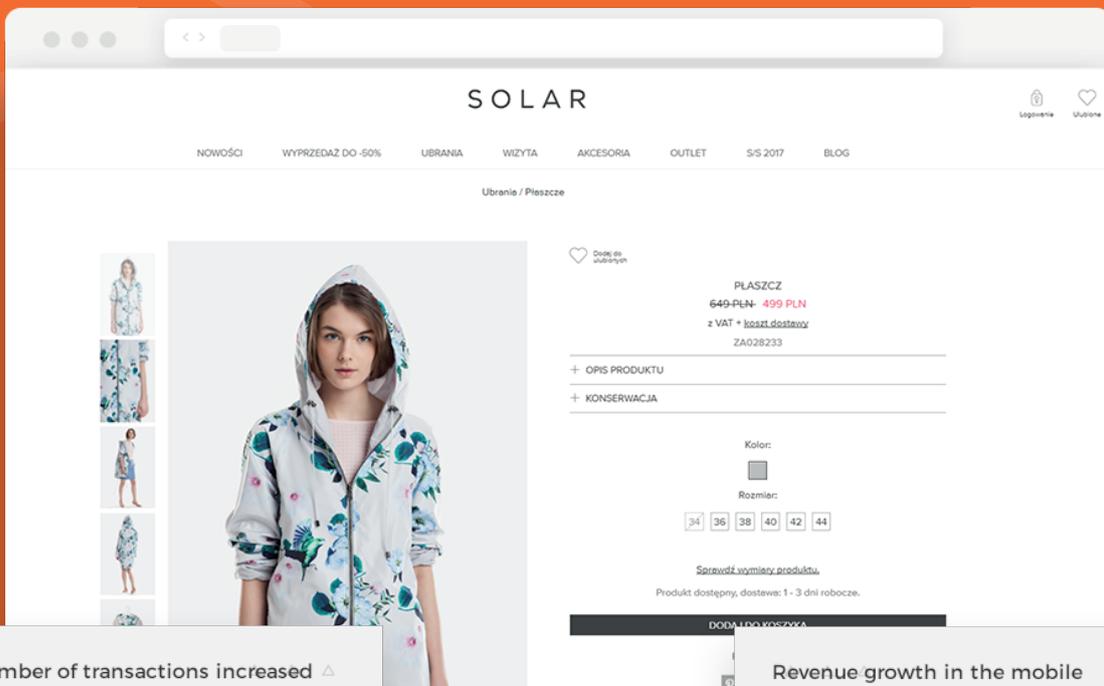
2. An agreement for the transfer of personal data processing

If you do not host your store in your own infrastructure (your own server) and you outsource hosting to a third party, you should sign an agreement for the transfer of personal data processing with your hosting provider. This company has access to your clients' data because it is stored in the database on the company's servers and in the backup copies. Many platforms have a proper agreement within its terms of use or an implementation/hosting agreement. It is vital to pay attention to it so as to avoid potential problems in case of security problems in the future.

Migration Case Study

SOLAR

Solar is a premium fashion brand established in 1989, producing 1.3 million garments per year. Solar has 74 of its own retail stores, 19 franchise outlets and 76 partner stores in Poland, as well as 4 franchise outlets located in Germany and Luxembourg. The brand started online sales via the company website in 2012.



Number of transactions increased in the mobile channel

483% ↑

Revenue growth in the mobile channel

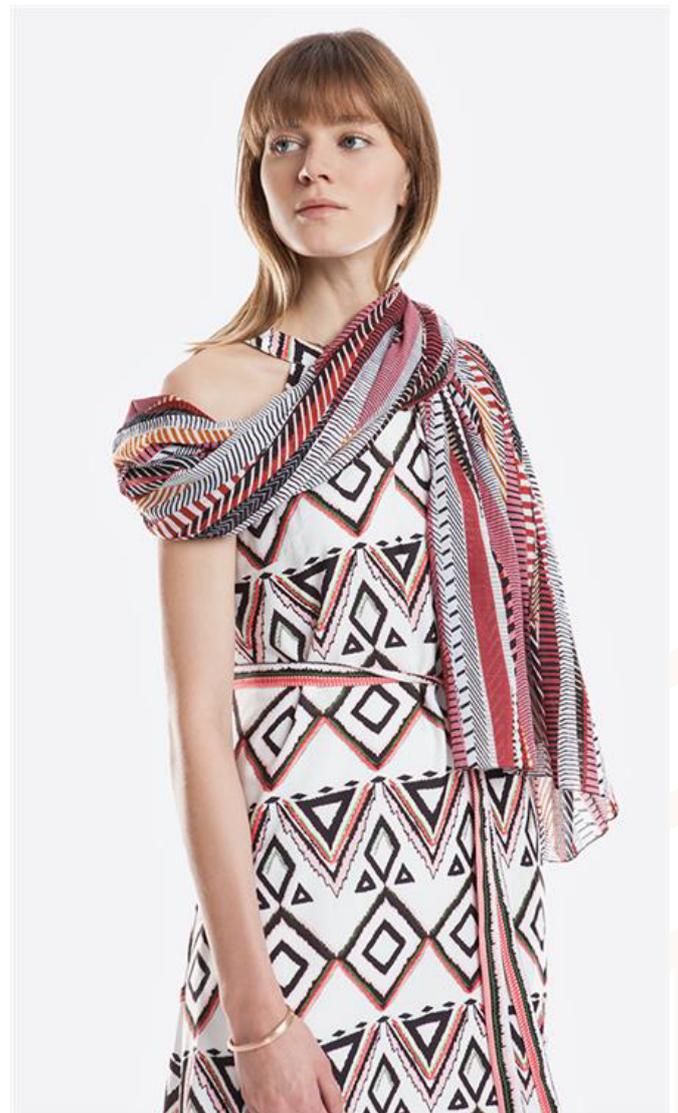
237% ↑

Solar - Migration Case Study

The decision to change the platform and migrate the store to Magento 2 was taken together with customers in response to growing customer expectations and market trends. The previous solution had not followed the dynamic expansion of the brand – the technology began to limit the platform’s development and new implementations as well as Solar’s business goals.

The main goals of the project were:

- Increasing conversion in the online channel with a focus on the mobile channel
- Refreshing the layout according to the new corporate identity
- Transferring the Solar brand to the new eCommerce technology that will guarantee stability and rapid platform development
- Implementing user experience solutions compatible with current trends and customer expectations



Solar - Migration Case Study



What are the results?

- 🏠 implementation of a fully responsive version of the store
- 🏠 launching the store along with the introduction of a new collection
- 🏠 number of sessions increased in the mobile channel by **21%**
- 🏠 revenue growth in the mobile channel by **237%**
- 🏠 number of transactions increased in the mobile channel by **483%**

Solar has become a [Magento Imagine Excellence Award Finalist for The Best New Implementation of a Magento 2 Store](#) in 2017.



Marta Oleszak - Online Store Manager, Solar

Magento is a platform of unlimited expandability, giving a lot of marketing opportunities. The new technology offered by Magento 2 will allow us to respond quickly to our customers' needs, such as picking up orders in retail stores or integrating the e-store with our Loyalty Program.

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The above points are the minimum we should pay attention to during and after a store's migration from one software to another. They have been gathered based on our practice and experience. Different stores require different attitudes, and a varying level of attention paid to the given areas. It is a good idea to think what else could be brought into the list in the case of a given store. But be sure to make it ahead of, not after the migration, to avoid problems!



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If you are not sure, just get in touch with us.

Our business consultants will find out which areas you need to focus on and show what action we can take to implement all the required changes effortlessly.

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