



# Adobe Commerce to → BigCommerce

The Ultimate Playbook  
by Joseph Maxwell



# Table of Contents

---

Introduction .....	3
<b>The big 3</b> .....	6

## Part 1: Migration Overview

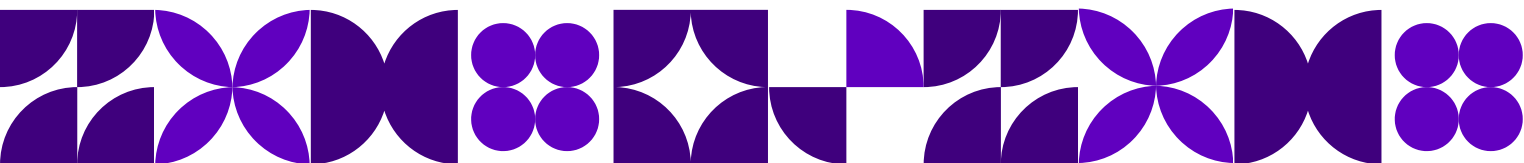
Requirements gathering .....	9
Data migration .....	9
The work .....	10
The magic day of release .....	10
Design decisions .....	11
Headless decisions .....	12

## Part 2: Growth Opportunities

<b>The chart</b> .....	14
Setting the stage .....	17
Catalog Management .....	19
Category Features .....	23
Content Management .....	25
Inventory Management .....	28
Customer Management .....	29
Checkout .....	31
Order Workflows .....	33
Marketing .....	35
B2B Features .....	38
Administration .....	41

## Part 3: Feature-Gathering Methodology

Catalog .....	43
Customers .....	44
Checkout .....	45
Taxes .....	45
Shipping .....	47
Payments .....	48
Integrations .....	49
User experience .....	50



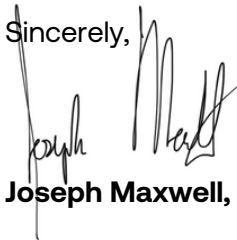
# The key to a successful project is a well-defined start.

## Welcome!

Merchants often find the thought of moving from one ecommerce platform to another incredibly daunting because of past experiences with large complex projects. Unless merchants are fortunate enough to have the support of a solutions integration partner who has, through experience, developed a thorough website migration process, the merchant will once again experience surprises and set backs.

The purpose of this quickstart is two-fold: to provide merchants with information that will orient them to differences between Adobe Commerce and BigCommerce; and to outline process components that are key to successful platform migration planning.

Sincerely,



**Joseph Maxwell, President of SwiftOtter**

A successful migration to BigCommerce is achieved by setting a solid foundation before task work within the project begins. This playbook will give merchants the information they need to effectively collaborate with their chosen solutions integration partner. The first step in the process is project "requirements gathering." A capable partner will make this the first order of business and a primary focus.

## Can I email this playbook to a colleague?

Many people simply send this PDF in an email. Or, unfortunately, others upload it to online sharing websites. This reduces the overall value I desire to communicate to those who read it.

## May I ask a favor from you?

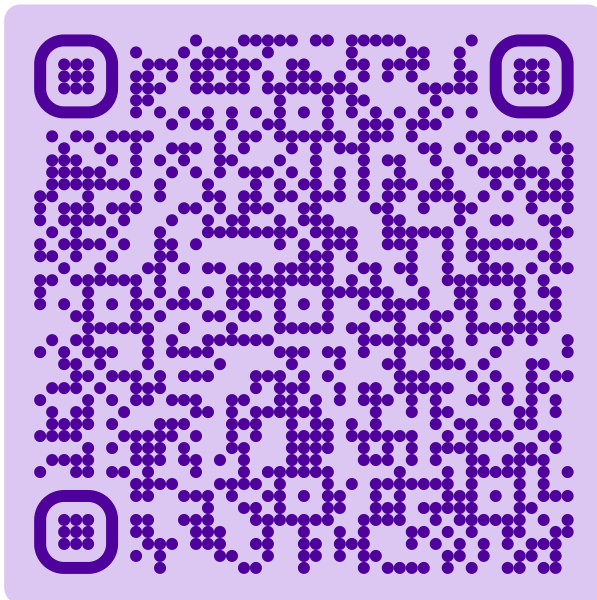
I have put massive effort into building this guide. If this is worth sharing, please share the link where this can be downloaded. Would you help me?

[Download this guide](#)



### Shareable link:

<https://swiftotter.com/development/bigcommerce/adobe-commerce-to-big-commerce-playbook>



# Introduction

This quickstart contains three segments.

## **The Methodologies of a Successful Migration**

Platform expertise must be coupled with a well-crafted migration process to achieve a successful project journey. The second segment of this playbook outlines such a process; the SwiftOtter Migration Methodology.

Overlooking either of these aspects of migration can be catastrophic.

## **An Adobe Commerce to BigCommerce Feature Comparison**

A feature comparison is essential to the proper planning of a platform migration. While the workflow between the two platforms is similar in many cases, there are cases in which the workflow is significantly different. This is also where a business operator will see the most impact on day-to-day operations.

The similarities and differences must be understood in the initial planning stages to "map" the current workflows to the new platform. This understanding is imperative to achieve a smooth and successful migration project. A solutions integration partner must have a proven record of expertise with both platforms.

Feature comparison is so meaningful that this section represents most of the playbook. We use platform-specific terminology to communicate in a universally understood language.

The feature comparisons are based on each platform's "out-of-the-box" feature set.

## **Feature Gathering**

At the end of the day, your agency needs to determine what needs you have on the platform. A good agency, like SwiftOtter, will have further questions, but this is a great start that will get you on the right track, thinking about areas you may not yet have pondered.

# The big 3.

## 1. Reduced friction in the customer journey ([video review](#))

**5-10%**

conversion rate increase  
(estimated average)

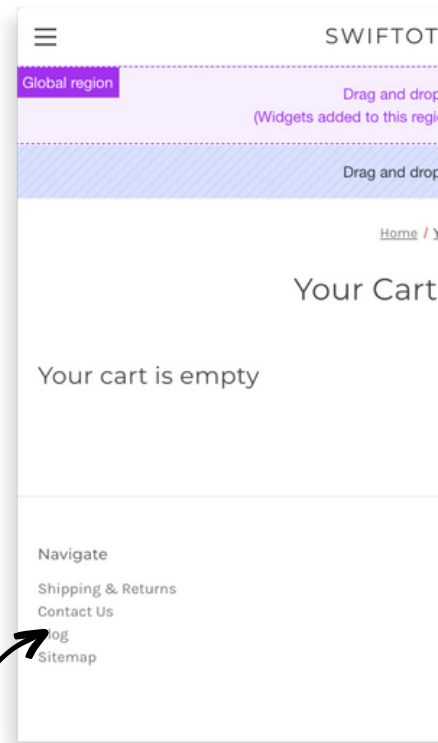
**\$1,500,000**

estimated revenue increase  
based on \$20M revenue

Potential customers are easily frustrated. Every time you release changes to production, there is a (potentially even high) probability that something in the customer journey will break.

BigCommerce's SaaS approach significantly reduces the number of touch points. Out of the box, this could be seen as 1000 to 0. While the end product's touch points will be more than 0, the same increase can be said for Adobe Commerce.

In the long term, BigCommerce is more stable. The likely effects are not only conversion rate increases but also a significant ongoing reduction in maintenance costs.



**Excellent Page Builder tool**

**Multi-address support**

## 2. Significant native checkout features ([video review](#))

**5%**

conversion rate increase  
(estimated average)

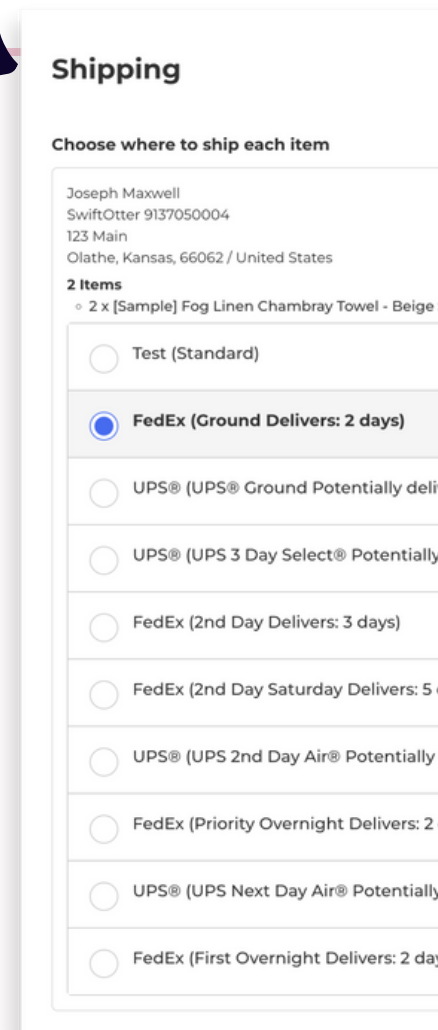
**\$1,000,000**

estimated revenue increase  
based on \$20M revenue

The native BigCommerce checkout is hands-down better:

- Customers can be forced to register inside the checkout process instead of only BEFORE entering the checkout.
- Native auto-complete for shipping addresses.
- Inline multi-address support that allows easy per-destination products and shipping.
- Included ShipperHQ Essentials plan.
- Flip-of-a-switch digital wallet support.
- B2B Edition: create any new field desired to be inserted into the checkout.

The checkout frontend is a standalone Javascript application that can be customized. This gives additional power, as needed.



# The big 3.

## 3. Reduced friction in the customer journey

**3%**

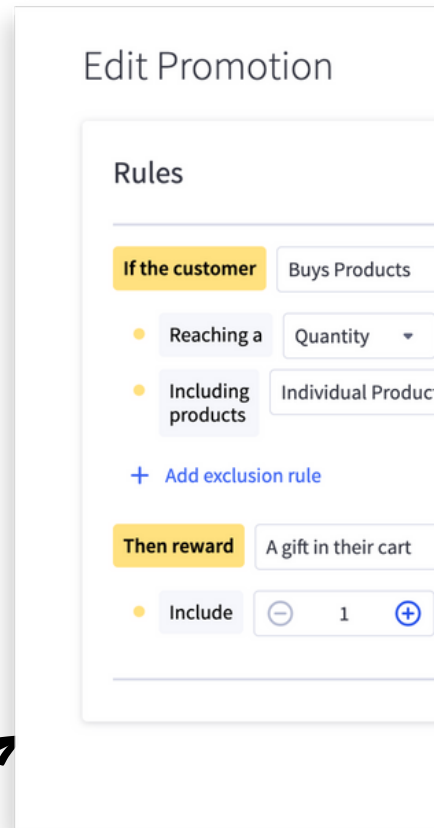
conversion rate increase  
(estimated average)

**\$600,000**

estimate revenue increase  
based on \$20M revenue

On paper, Adobe Commerce achieves brownie points for its capability to customize promotions. In reality, some significant limitations put a box on this excitement. You can't give customers a different product in a Buy X Get Y Free scheme. You can't schedule a promotion for specific days of the week. You can't require a specific product in the cart while giving a discount on another product (combo discount). While you can install 3rd-party modules to make up the difference, our experience is that these negatively affect performance.

BigCommerce's promotions engine solves these frustrations—out of the box. Easily leveraging these promotions at strategic times will help boost the conversion rate.

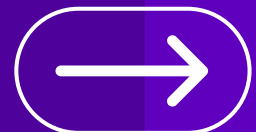


**Unbelievably powerful  
promotion rules engine.**

# Part 1

---

## Migration Overview





We can generally distill the migration process into four steps. These steps often house significant work, but thinking of this from a birds-eye view is still helpful.



## Requirements gathering

We would all agree that this represents one of the most boring phases of the overall project. Unfortunately, many sales teams rush this process to get the signature.

**In our experience, this is the most important step of them all.**

We have seen cases where a merchant solicits multiple bids, all coming in at different numbers. The higher numbers may be because those agencies have done a more thorough requirement-gathering process. We at SwiftOtter, have fine-tuned our processes to ensure a quality result at a reasonable price. Our goal is to eliminate surprises before they have a chance to become a surprise.

Magento 2 / Adobe Commerce websites are complex. There is almost always customization. If your website is not adequately discovered, you will likely be surprised: "why wasn't this feature moved over?" There are no shortcuts. We use a fine-toothed comb to investigate every aspect of your system, determining your current status and desired result.

While we try to complete as much of the discovery ourselves as possible, we rely on your team to answer some questions and verify our findings.



## Data migration

You need to decide what data you want to be moved to BigCommerce. While it would be nice to move everything over, in our experience, the benefits are less than the cost. We often give rough numbers for each data type (which depends on the quantity, complexity, and customization).

Make sure to review your data, ensuring that everything critical is copied over. This will include products, categories, orders, and customers.

## Data migration

We typically migrate this data two times: once at the beginning of the project and once just before (or during) launch. Products and categories can be finalized a week before the release, provided a content freeze can be enacted on the Adobe Commerce website. Upon release, there is a final delta of customers and orders.



3

## The work

This is when our developers get to work, architecting and crafting your new experience according to the agreed-upon Scope of Work. This process often takes at least 3 months. Depending on the size of the project, we will likely have bi-weekly pre-scheduled cadence status calls. This will ensure the project is on track and answer any outstanding questions.



4

## The release

The rubber meets the road today. All of the hard work invested thus far will begin to be proven. You will start to realize a return.

We must back up about one week before the release, where we begin executing well-developed checklists. These have been tuned over years of successful releases. Planning is always crucial to good results.

### Should I get the BigCommerce “Smart Start” plan?

Training is a critical component of a happy hand-off. Your BigCommerce sales executive has likely recommended their Smart Start plan: we likewise recommend it. Consider this inexpensive “insurance”. This plan has several components:

- Implementation project manager: your gateway for answering challenging questions at BigCommerce. This person can also be responsible for overseeing the development of the project.
- Solutions architect: as a technical team member, this architect provides advice as needed.
- Launch training: this is one of the most imperative aspects of this package. You have at least three days of one-on-one training on using your admin panel. While your agency could also do this training, it’s important to note that it will not be in this depth or length. We highly recommend this aspect of the Smart Start plan.

## The grand design decisions

One of the bigger conversation points will be around the strategy for the look and feel of your website. There are two choices: 1) stick with the existing look and feel, or a transparent migration and 2) employ a new creative direction.

### Option 1: leverage your existing user experience

If you are happy with your existing website's experience, the easiest may be to transfer this to the new website. This is considered "safe" as customers will not see much difference.

This is not necessarily the cheapest option. This is because Adobe Commerce and BigCommerce have different design paradigms. Making BigCommerce look like Adobe Commerce requires a significant number of minute changes. The right columns serves as an illustration—notice the differences.

### Option 2: leverage a new user experience

The other option is to start with a new creative direction. At the most basic level, this involves locating a theme and establishing a budget for changes to the theme. This may be an acceptable approach for budget-conscious merchants.

For an ideal customer experience, we recommend starting from the ground up with a design process. We will coordinate with you to identify a budget for the design implementation. The design will always fit within your defined budget.

We will go through several steps to ensure a beautiful and functional experience.

- We start with several conversations to get your vision for the future of your website. We will seek to understand current pain points. Sometimes, we request access to the customer service team to hear the challenges they experience.
- We identify high-level design direction. Often, we will seek out other websites as inspiration.
- We will review Google Analytics (along with your team) to get demographic information.
- We proceed to a conceptual phase once we have a well-defined creative brief. You will be involved in this process to identify sticking points as early as possible.
- We will present the final mockups. These will go through several iterations before arriving at the final product.

**BigCommerce**

### Argus All-Weather Tank

[Sagaform](#)

\$22.00

★★★★★ (No reviews yet) [Write a Review](#)

SKU: MT07

Gift wrapping: Options available

Size: (Required)

Color: Gray (Required)

Quantity:  1

[f](#) [e](#) [p](#) [t](#) [p](#)

**Magento 2**

### Argus All-Weather Tank

[Be the first to review this product](#)

As low as **\$22.00**

SKU#

Size

Color

Qty

[♥ ADD TO WISH LIST](#) [⚡ ADD TO COMPARE](#)

## Should our new experience be headless?

Headless has risen to prominence thanks to its dazzling promise: an application that combines multiple pieces of technology. Merchants often leverage headless to use a best-in-class content management system alongside a best-in-class ecommerce solution. These websites often achieve outstanding performance reviews from search engines, boosting their rankings where it matters most.

We are excited about this ourselves, such that our website is a headless ecommerce experience.

The downside with headless centers around the cost to build and maintain the website. More code means more opportunities for breakage. Additionally, development costs will be higher since this technology is still maturing.

The best answer to this question is unique to every merchant. Some merchants will get so much value—there is no question. Others will be closer to a balance, so the traditional route is best, for now.

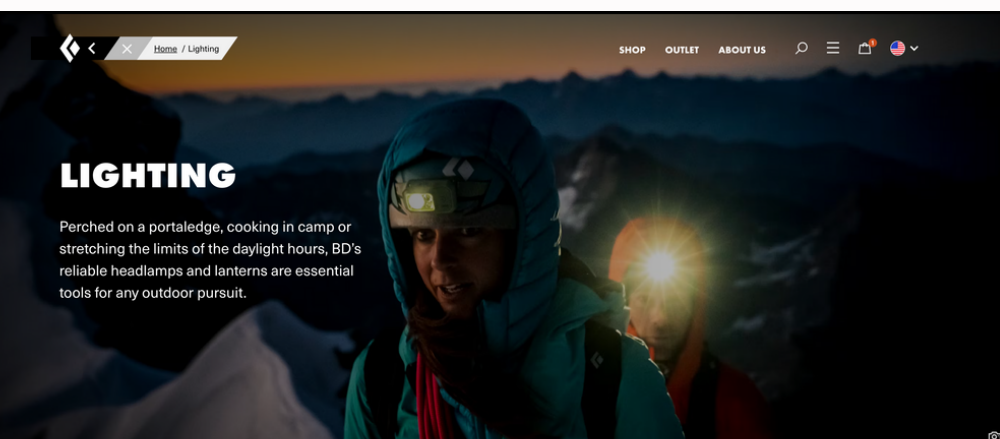
### How BigCommerce makes this decision easy

Many merchants won't have a clear decision of one way or the other. BigCommerce can help make this decision by temporarily deferring it.

BigCommerce is that they have fully embraced the headless approach. Every API is ready. Thus, by first moving to BigCommerce and then transitioning to headless, you can eventually leverage these benefits as it fits into your budget.

BigCommerce becomes a solid first-step into this headless world. The new headless frontend can be developed and released on an entirely individual schedule.

### Sample BigCommerce headless implementation



### Black Diamond Equipment

BigCommerce + CMS (Prismic) integration to facilitate easy content development.

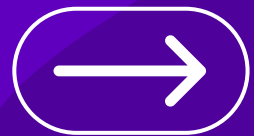
# Part 2

---

## Growth Opportunities





**SwiftOtter**






			
<b>Est. Min. Yearly Costs</b> Including maintenance, hosting and licensing fees; excluding build fees.	\$\$\$\$\$	\$\$\$\$\$	\$\$\$
<b>Est. Build Costs</b>	\$\$\$\$\$	\$\$\$\$\$	\$\$\$
<b>Maintenance Costs</b>	\$\$\$\$\$	\$\$\$\$\$	\$\$\$
<b>Platform-style</b>	Open-source	Open-source + Cloud-hosted	Cloud-hosted
<b>Security / hardness</b>	★★★★☆	★★★★☆	★★★★★
<b>Ability to quickly handle large traffic influxes</b>	★★★★☆	★★★☆☆	★★★★★
<b>Multiple Storefronts</b>	★★★★★	★★★★★	★★★★☆
<b>Support</b>	X	★★★☆☆	★★★★★
<b>Operator Happiness</b>	★★★☆☆	★★★☆☆	★★★★☆
<b>Catalog</b>			
<b>Pre-orders</b>	X	X	★★★★★
<b>Downloadable Products</b>	★★★★★	★★★★★	★★★★★
<b>Gifting</b>	★★★★☆	★★★★★	★★★★☆
<b>Rich Attribute Types</b>	★★★★★		★★★☆☆

 **Magento 2**  
The “free” / open-source version.


 **Adobe Commerce**  
The “paid” edition. Usually hosted in the cloud.


 **BigCommerce**  
Enterprise edition. Hosted in the cloud.



			
<b>Product Variations (limit)</b>	★★★★★	★★★★★	★★★★☆ 600
<b>Product Modifiers/Options</b>	★★★★★	★★★★★	★★★★★
<b>Price Lists</b>	★★★★☆	★★★★★	★★★★☆
<b>Native Product Search</b>	★★★☆☆	★★★★★	★★☆☆☆
<b>Product Relations</b>	★★☆☆☆	★★★★★	★★★★☆
<b>Category permissions</b>	X	★★★★★	★★★★☆
<b>Auto-assembled categories</b>	X	★★★★☆	★★☆☆☆
<b>Page Builder</b>	★★★☆☆	★★★☆☆	★★★☆☆
<b>Inventory</b>			
<b>Quantity Thresholds</b>	★★★★★	★★★★★	★★★★★
<b>Inventory Warehouse Tracking</b>	★★★★★	★★★★★	X
<b>Backorders</b>	★★★★☆	★★★★☆	X
<b>Customer Management</b>			
<b>Customer Impersonation</b>	★★★★★	★★★★★	★★★★★
<b>Wishlists</b>	★★☆☆☆	★★★★☆	★★★★☆
<b>Custom fields</b>	X	★★★★★	★★★★★
<b>Segmentation</b>	X	★★★☆☆	★★☆☆☆

 **Magento 2**  
The “free” / open-source version.

 **Adobe Commerce**  
The “paid” edition. Usually hosted in the cloud.

 **BigCommerce**  
Enterprise edition. Hosted in the cloud.



### Checkout

	Magento 2	Adobe Commerce	BigCommerce
Order Comments	★★★★☆	★★★★☆	★★★★★
Live Shipping Rates	★★★★☆	★★★★☆	★★★★★
Shipping to Multiple Addresses	★★☆☆☆	★★☆☆☆	★★★★★
Multiple Origin Shipping	★★★★☆	★★★★☆	★★★★★ (Shipper HQ Advanced Feature)
Partial Invoicing	★★★★☆	★★★★☆	X
Buy Online Pickup In Store	★★★★★	★★★★★	★☆☆☆☆ (API-only support)
Admin User Experience	★★★★★	★★★★★	★★★☆☆
Currencies	★★★★☆	★★★★☆	★★★★☆
Gift Cards	X	★★★★☆	★★★☆☆



#### Magento 2

The “free” / open-source version.



#### Adobe Commerce

The “paid” edition. Usually hosted in the cloud.



#### BigCommerce

Enterprise edition. Hosted in the cloud.



## Your attention, please...

If you enjoy this quickstart and want a more in-depth comparison, [you can find our 180+ page document here.](#)

## Setting the stage

A switch to BigCommerce involves a change in mindset. Adobe Commerce is somewhat open-source (although they are rapidly moving in the SaaS direction), while BigCommerce is "open-SaaS", their marketing terminology for an extensible SaaS platform. Expecting BigCommerce to be as "easily customizable" as Adobe Commerce will result in disappointment.

### Is the nature of SaaS a limitation to growth?

Some would say that SaaS is not customizable. You get the platform, and that's it. If you want flexibility, you need to use an open-source platform.

In our experience, this is different for BigCommerce. The API is so extensive that there is very little that can't be ultimately changed. Sure, some customizations will take more work on BigCommerce than Adobe Commerce, but that can be said of any platform.

### Licensing cost comparison

The best part of BigCommerce's licensing fees is that they are based on order counts rather than revenue (unlike most competitors). Thus, a merchant is incentivized to increase average order value while still knowing how much they will spend to bring additional orders to the store.

While it's impossible to draw a definitive conclusion, in our experience, BigCommerce's license fees are generally less than Adobe Commerce's.

### How does BigCommerce compare with Magento Open Source?

Merchants may be surprised about the BigCommerce licensing fee—after all, isn't Magento free? The truth is that Magento is not free. As you will see in the next section, Magento takes constant feeding and care. More liability falls on the Magento merchant because they are responsible for keeping the website up-to-date.

# Setting the stage, continued

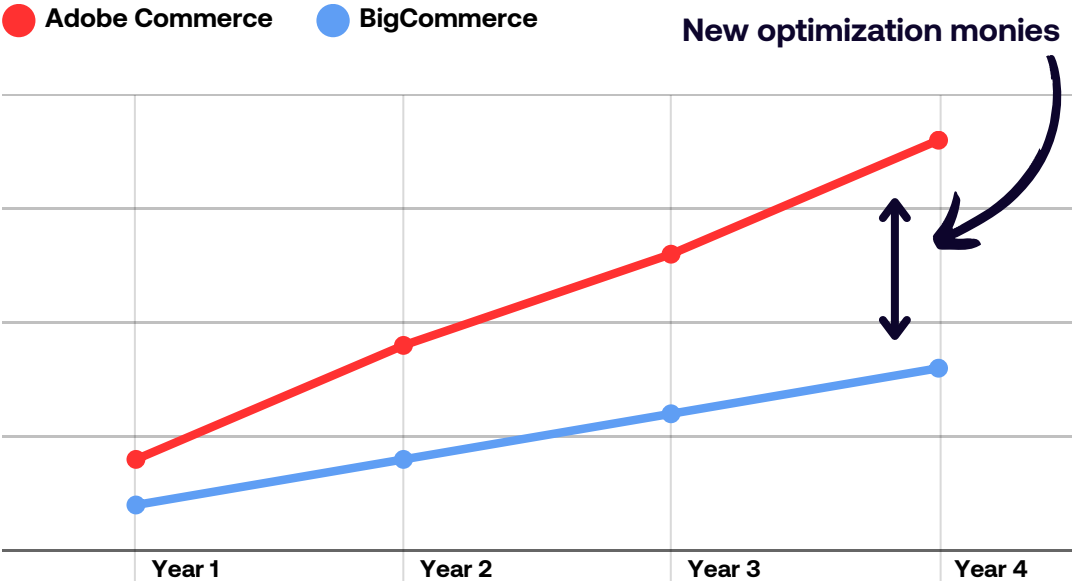
## The ongoing total cost of ownership

The total cost of ownership is impossible to determine quantitatively as every website is unique. However, based on our experience, many active Adobe Commerce merchants will spend at least \$2,000 monthly upgrading and securing the platform. These costs do not exist on BigCommerce; the only upgrade costs are updating the theme when new features are released.

Adobe Commerce's claim to fame is its customizability. The core is stable, performant, and upgradeable. However, poorly done customizations built on top of the base product will cripple your website. This increases upgrade costs as more areas must be tested to ensure no breakage. This is one reason why Adobe Commerce developers are often billed at what seems like "lawyer" rates: because they must possess vast technical expertise.

BigCommerce flips the script: this maintenance budget can be spent on optimization instead. For even merchants in "maintenance mode" on their website, keeping a flat website budget will result in consistent, ongoing optimizations to grow revenue.

## Platform savings or optimization budget



This assumes a merchant transacts \$20M yearly revenue. Includes estimated licensing fees and maintenance costs. This comparison starts after migration is complete. Adobe Commerce typically requires significant upgrades every 2-3 years, thus the bumps.

# Catalog Management

Both BigCommerce and Adobe Commerce provide the basics for product management. BigCommerce's interface is generally a better experience. BigCommerce takes a different approach to managing configurable products (product variants). This reduces the number of attributes necessary to maintain a website, often a performance pain point on Adobe Commerce.

## What additional value does BigCommerce bring?

### Product variants and options

BigCommerce can share variants and modifiers (options) between products. This significantly reduces administrative overhead and the potential for error.

### Ability to view a product directly on a storefront

We remain surprised that this was never built into Adobe Commerce.

### Pick list

This type of product modifier (custom option) in BigCommerce is a list of SKUs that can be added to the order. This functions similarly to bundled products in Adobe Commerce. You can easily leverage this to upsell products or build kits.

### Open Graph integration

BigCommerce natively includes Open Graph details—no customization required. This improves search engine optimization by placing help information onto the search page result.



Trinity Bat Company  
<https://www.trinitybatco.com> > Bats

### Platinum XX

Platinum XX is a considered a weapon of mass destruction. With the largest barrel crafted at Trinity, this bat comes fully equipped from top to bottom.

★★★★☆ Rating: 4 · 2 reviews · \$159.00 · In stock



# Catalog Management

## What additional value does BigCommerce bring?

### Pre-orders

Administrators can designate a product in BigCommerce as a pre-order. This status is disabled as of the release date. Customers are notified that this product is in the preorder status.

### Multi-channel integration

While Adobe Commerce can integrate with Walmart and Amazon natively. While there are modules to provide almost all other integrations, their quality varies wildly.

### Feedonomics

BigCommerce's Feedonomics tool integrates with almost every imaginable channel (Google Shopping, Amazon, Walmart, Target+, eBay, Rakuten, etc.). Additionally, it leverages state-of-the-art technology to process and finetune feed data.

## What areas are functionally similar between BigCommerce and Adobe Commerce?

- Price lists (BigCommerce is more performant)
- Quantity discounts
- Manufacturers Suggested Retail Price (MSRP)
- Product Images
- Product Visibility
- Downloadable products
- Swatch
- Gift wrapping
- Gift certificates
- Import/export

# Catalog Management

## What parts of our process may need adaptation when moving from Adobe Commerce to BigCommerce?

### Multi-storefront

While BigCommerce does allow for hosting multiple domains (storefronts) on one instance, they are making tremendous strides toward being fully internationalized. The result will be better than Adobe Commerce. They project to have these features completed in early 2024.

In the meantime, some apps can help to fill the space. A Product Information Management (PIM) system can interface with multiple BigCommerce stores (and admin areas) where attributes must change across storefronts (for translations).

### Product variants

BigCommerce enforces a limit of 600 child variant options per product. This can be overcome with customizations.

### Grouping products

You will need some developer-enabled customizations to your BigCommerce store if you are required to allow multiple products to be added to the cart simultaneously (think sandpaper roughness or “grit”).

### Product relations

BigCommerce is developing an advanced product relationship management tool. However, in the meantime, tools like Klevu are an excellent choice.

### Scheduled updates

BigCommerce has significant improvements scheduled for release in early 2024. At this point, administrators can create active promotions for a specific timeframe. SwiftOtter can help identify or build additional needs.

# Catalog Management

## What parts of our process may need adaptation when moving from Adobe Commerce to BigCommerce?

### **Attribute management**

It's critical to note that BigCommerce does not use attributes for configurable products—an entirely different and rich selector system is used here. Thus, these attributes are mainly used to hold product specifications like Capacity, Voltage, etc. In this new framework, many fewer attributes are generally required.

But, if you still have many of these attributes, you might consider a tool or customizations to facilitate this. While BigCommerce supports “unlimited” attributes, the challenge lies in administering these attributes, as attribute values are text-only. This is entirely workable, but it may come as a surprise given Adobe Commerce’s rich attribute capabilities.

### **Excise taxes**

Some apps provide this functionality and SwiftOtter can help identify an ideal solution.



# Category Features

BigCommerce has rich capabilities for building content on category pages: we have seen this become more critical over time. Past this, both platforms have functional parity.

## What additional value does BigCommerce bring?

### Category filters

Administrators can control which filters (and values) are available for use.

### Excellent Page Builder integration

Content administrators can inject rich content into several predefined places with an in-page editing experience. Developers can easily add more.

## What areas are functionally similar between BigCommerce and Adobe Commerce?

- Anchored categories/child product aggregation
- Sort order
- Auto-assembled categories (rich brand pages on BigCommerce)
- Canonical tags
- Number of products per category
- Category permissions

# Category Features

## What parts of our process may need adaptation when moving from Adobe Commerce to BigCommerce?

### **Adjusting a category's default sort order**

BigCommerce allows promoting featured products but does not allow a store administrator to adjust the list of products manually. Klevu is a good solution if fine-grained control is a “must”. Based on our experience, best practice is to have somewhat small categories with 1-2 pages. Sort is much less critical when following this methodology.

### **Category permissions**

BigCommerce provides a close feature set as Adobe Commerce for category permissions. One notable change is that when adding a new category, the administrator needs to enable this category for every customer group if they limit category browsing.





# Content Management

Even though BigCommerce's Page Builder tool has a better experience than Adobe Commerce, BigCommerce has committed to significant improvements to be released in early 2024. Some features, like common blocks and widgets, haven't yet been promised, but in our experience, these are rarely used in Adobe Commerce.

## What additional value does BigCommerce bring?

### Pages and Hierarchy

While Adobe Commerce and BigCommerce have a similar feature set on paper, the implementation is quite different. BigCommerce's Page Builder lives on the front end, so you can see changes "real-time". This saves time in visualizing the layout. You can click from page to page and edit the new page.

Additionally, with BigCommerce, Page Builder is integrated into all types of pages on the website: product, category, home, and content. For example, content administrators can easily inject content into areas such as above and below-category product listings.

## What areas are functionally similar between BigCommerce and Adobe Commerce?

- Pages and Hierarchy

# Content Management

## What parts of our process may need adaptation when moving from Adobe Commerce to BigCommerce?

### **CMS Blocks**

BigCommerce does not have a parallel concept. However, a developer like SwiftOtter can build a widget that would operate similarly. That said, very few of our clients extensively use blocks.

### **Templates**

While we could argue that templates in Adobe Commerce are quite basic, they still provide value. This isn't present yet in BigCommerce.

### **Widgets**

BigCommerce does not have a way to apply content to multiple pages at once. Banners mostly fit this criteria but are limited to only a text banner.

# Who wrote this guide?

"My name is Joseph Maxwell and I approve this message."

No, I'm not running for political office (thank goodness). Instead, my passion is helping merchants succeed. I lead a team of ecommerce veterans who claim ownership over the projects they lead.

Back in 2018, on the Magento 2 platform, I built study guides similar to this—except the intended audience was to help developers get certified. Through these guides, we helped nearly 10,000 people get certified and built an ecommerce storefront to sell these items.

My approach to helping merchants is embodied through the lens of our mascot, the otter. Otters are friendly, smart, playful and highly creative. We use these characteristics as defining points for how SwiftOtter operates.

I reside in Kansas City, KS with my wife and three children.

Let me know if you have any questions as I am happy to answer.



**Joseph Maxwell**



# Inventory Management

While BigCommerce has basic inventory capabilities, a few areas differ from Adobe Commerce. For example, BigCommerce doesn't support backorders. This is no problem if a merchant uses a separate system to manage inventory.

## What areas are functionally similar between BigCommerce and Adobe Commerce?

- Inventory by location
- Purchase thresholds
- Credit memo returns product stock

## What parts of our process may need adaptation when moving from Adobe Commerce to BigCommerce?

### Backorders

While BigCommerce has unique abilities to handle cases where a product is out of stock, there is no support for backorders. Administrators cannot enter negative quantities. It is easily argued that ecommerce is not an inventory management tool. However, if this is a critical need, there are tools to accommodate these requirements.

### Inventory by location

At this point, there is one challenge with inventory tracking in BigCommerce: the quantity at the Default location determines whether or not a product is in stock, and this Default location is decremented with a shipment. These functionalities can be adjusted with the API as desired.

### Quantity increments

While this is not out of the box in BigCommerce, an experienced developer like SwiftOtter can easily add this capability.



# Customer Management

BigCommerce has some helpful features that remove friction from the customer journey: providing flexibility around when a customer is registered and even eliminating passwords altogether. While many merchants haven't fully utilized customer segments for personalization, other technology partners have far surpassed these capabilities—these are easy to integrate into BigCommerce.

## What additional value does BigCommerce bring?

### **Automatically registering customers after checkout**

No one likes to be greeted with a “please log in” screen when they intend to check out. BigCommerce allows customers to be automatically registered once the checkout is completed.

### **Passwordless logins**

Customers can request an email login link instead of selecting a password.

## What areas are functionally similar between BigCommerce and Adobe Commerce?

- Impersonation
- Customer groups
- Customer attributes
- Editing customer cart contents
- Administrator password reset
- Wishlist

# Customer Management

## What parts of our process may need adaptation when moving from Adobe Commerce to BigCommerce?

### **Customer segments**

While we rarely observe merchants on Adobe Commerce using Customer segments, it is important to call this out. BigCommerce does not (yet) have functionality for segmenting customers into buckets for personalization. However, BigCommerce is building the APIs for this, and we anticipate additional capability soon. We instead recommend utilizing 3rd-party vendors to provide on-site personalization experiences.

### **Store credit**

While BigCommerce does track store credit, it is a number. A developer, however, can build an apparatus to track history.



# Checkout

BigCommerce has boldly claimed that its checkout performs the best. Based on our professional experience and our review of the competition, we believe it. BigCommerce shines in this department. The only areas for adaptation are partial invoicing and Buy Online, Pickup In-Store (BOPIS)—the latter is on their roadmap.

## What additional value does BigCommerce bring?

### Order comments

This is native to BigCommerce. If you utilize the B2B Edition, you can add any custom fields desired.

### Address autocomplete

BigCommerce has native integration with a Google Maps autocomplete menu that reduces customer friction.

### Multi-address shipping

While Adobe Commerce has multi-address support, it is built as more of an afterthought. BigCommerce's native workflow includes multi-address support. Customers will find moving products from one destination to another quite easy.

### ShipperHQ Essentials

Determining shipping rates is intuitive thanks to the powerful ShipperHQ system that is included with BigCommerce. Merchants have fine-grained control over these rates and carrier integrations.

### Native digital wallets

BigCommerce has made significant investments in payment integrations. Google Pay, Apple Pay, and Venmo (among others) are available out of the box.

# Checkout

## What additional value does BigCommerce bring?

### Online payment providers

BigCommerce is integrated into all major gateways and then some—natively. Here is the list.

## What areas are functionally similar between BigCommerce and Adobe Commerce?

- Terms and Conditions
- Internationalizing payments
- Currency conversion

## What parts of our process may need adaptation when moving from Adobe Commerce to BigCommerce?

### Buy Online, Pickup In-Store (BOPIS)

While the BigCommerce API aspects are complete, the frontend integration is still in progress. Thus, if BOPIS is critical, plan for extra development time to round out this feature set.

### Partial invoicing

From a native BigCommerce perspective, there isn't a capability for this. However, several excellent 3rd-party choices fit this requirement perfectly.





# Order Workflows

BigCommerce provides an excellent order lifecycle workflow. Because of how they have architected their APIs, a developer can leverage business logic or can simply use BigCommerce as a database. Thus, there are literally no limits on what BigCommerce can do.

## What additional value does BigCommerce bring?

### Custom shipping rates

BigCommerce natively can specify a custom shipping rate on an order.

### Customer-completed orders

Using BigCommerce (even without B2B Edition), a salesperson can configure an order and send the link to the customer to pay for it. This reduces the load on a salesperson trying to get a hold of the customer on the phone for their payment information.

### Export orders

BigCommerce enables administrators to build templates and export orders to CSV or XML format.

## What areas are functionally similar between BigCommerce and Adobe Commerce?

- Grid capabilities
- Viewing orders
- Resend order email
- Editing an order
- Order comments
- PDF invoices
- Returns
- Refunds

# Order Workflows

## What parts of our process may need adaptation when moving from Adobe Commerce to BigCommerce?

### Order extensibility

BigCommerce is SaaS. The admin area is built and maintained by BigCommerce. Thus, non-BigCommerce developers cannot access changing areas like the backend order page. The good news is APIs are available for every BigCommerce function, so qualified developers like SwiftOtter can rebuild the order workflow—but there will be an increased cost.

### Order status

Adobe Commerce splits order status into Status (admin-controlled) and State (system-controlled). Statuses are mapped to states.

BigCommerce only has Status, which is system-controlled. These statuses can be renamed. Statuses can be manually changed, but the system can override them.

### Reorder

To place a reorder in BigCommerce, the admin needs to log in as a customer (Adobe Commerce has a Reorder button on the Order screen). This is doable and only represents a slight increase in time. We argue that this reduces the overhead, as maintaining multiple routes for placing orders can be time-consuming.

### Minimum orders

It is trivial to add this capability into BigCommerce.



# Marketing

BigCommerce's flagship value-add in this category is promotions. While Adobe Commerce has a robust promotion system doesn't allow for common configurations like Buy X, Get Y free (automatically). While this can be added via modules, we generally find these modules for this, we often see these modules significantly affect performance.

You will have difficulty finding gaps in BigCommerce's promotion capabilities.

That said, personalizing content is an area that BigCommerce hasn't prioritized. This is likely due to how long it takes to personalize Adobe Commerce content. It's not automatic.

## What additional value does BigCommerce bring?

### Product discounts

While Adobe Commerce does have a robust discount engine, it's well-eclipsed by BigCommerce. Administrators on BigCommerce can configure almost any type of promotion imaginable. Groups of products can be selected (or excluded). Rewards can include a discount, free shipping, buy 1 get one free, buy X get a % off the next or even a bundle for a set price.

### Discount scheduling

While Adobe Commerce can specify a start and end date, BigCommerce takes this several steps further. Administrators can schedule promotions to be available on specific days of the week, repeating series and times of the day.

### Notification banners

As of Adobe Commerce 2.4.6, there is no longer a way to inject a banner at the top of the page. BigCommerce provides this capability, though you have to create a banner per page type.

# Marketing

## What areas are functionally similar between BigCommerce and Adobe Commerce?

- Promotion application sort order
- Redirects
- Abandoned cart emails

## What parts of our process may need adaptation when moving from Adobe Commerce to BigCommerce?

### Coupon codes

Adobe Commerce allows administrators to auto-generate coupon codes. This helps integrate email campaigns to determine how many are being used.

### Personalizing content

Adobe Commerce combines Customer Segments with Dynamic Blocks to inject content specific for customers with unique attributes. While this is nice on paper, our experience is this is tedious and few merchants use this capability. A corollary does not exist in BigCommerce natively. There are 3rd-party tools that can accommodate this.

### Search

Adobe Commerce has made significant investments in its Live Search tool. While BigCommerce does have search capabilities, it isn't as advanced as Live Search. We recommend a 3rd-party tool like Klevu to meet and exceed the difference in capabilities.

### Transactional email translation

BigCommerce does not yet have a way to translate transactional emails. This will be implemented by early 2024. However, these transactional emails can be easily customized.

### Loyalty features

Adobe Commerce has robust points loyalty program. To meet this requirement, there are 3rd-party tools that fit these needs well.



**Excellence in ecommerce experiences—since 2012.**

This quickstart is offered through the collaborative effort of a highly capable ecommerce team, namely "The SwiftOtter Team."

Why is SwiftOtter a trusted name in the Ecommerce Community?

- We have been building beautiful websites since 2012.
- We are an Adobe and BigCommerce Partner.
- 100% of our developers are platform certified for the work they do.
- We share our expertise with the Ecommerce Community by offering training materials that have helped thousands become certified.
- We give back; 10% of our net profits are given to "Lifewater International" which helps provide the basic need of clean water worldwide.
- We provide "thought leadership" through various live and online channels.
- We are consultive in our approach. We will not "sell" you something; we will thoroughly understand your needs and provide workable solutions.

If you see the value presented in this playbook, you also see the value of SwiftOtter.

Our team looks forward to taking your brand into the future.



# B2B Features

BigCommerce has significantly invested in the B2B Buyer Portal. Soon, the frontend Javascript application will become open source for all customizations. BigCommerce has identified critical features, such as shared addresses, custom checkout fields, and quick order improvements, that set it apart from its competitors.



[Comparison Video Review](#)

## What additional value does BigCommerce bring?

### Multi-storefront

This might seem slightly misleading as Adobe Commerce, too, has similar capabilities. We call this out here because BigCommerce implements multi-storefront on a SaaS platform—without exorbitant upgrades, bug whack-a-mole, and slow page speed.

### Shared addresses

Company accounts on BigCommerce can share addresses between individual buyers. This is incredibly helpful, saving time and reducing errors.

### Pay on account / Net Terms

BigCommerce can track net terms and invoices. This represents a significant functional enhancement over Adobe Commerce. Invoices can be entered into BigCommerce through orders or the API (from your ERP)

### Company management

Administrators using BigCommerce can see company information in one easy place. Sales staff can also be assigned to specific companies.

# B2B Features

## What additional value does BigCommerce bring?

### Additional fields in Checkout

Store administrators using BigCommerce can add as many custom fields as desired to the checkout—no code required.

### Quick order

While both platforms have Quick Order capabilities, BigCommerce shines in that it also provides a list of recently-ordered products. This will save buyers time as B2B buyers are often reordering products.

### Sales staff management

BigCommerce store administrators can associate specific sales staff with companies. These staff can only see their assigned companies, creating a streamlined management experience.

## What areas are functionally similar between BigCommerce and Adobe Commerce?

- Price lists
- Credit limits (coming in September 2023)
- Product restrictions / shared catalogs
- B2B purchase journey (BigCommerce moves the order approval to before the order is placed)
- Company registration
- Payment method restrictions
- Order approvals
- Quotes
- Ordering lists (requisition lists)

## What parts of our process may need adaptation when moving from Adobe Commerce to BigCommerce?

### Shipping method restrictions

BigCommerce does not allow controlling shipping methods at the company level.

# B2B Features

## Order approval rules

BigCommerce has a different Order Approval paradigm. On Adobe Commerce, orders are placed and then sent to the company administrator for approval and submission. On BigCommerce, orders are built by a Junior Buyer and then sent to the company administrator to place the order. Thus, a set of rules is hardly helpful given this difference in process.

## Permissions

While BigCommerce has two levels of permissions (Junior and Senior buyers), Adobe Commerce's permissions are incredibly granular with over thirty selectable permissions.

## The phases of B2B: crawl, walk run.

### Crawl

“Perfect” is the enemy of “done”. Getting started on BigCommerce with something is a huge step forward. We recommend focusing on product availability and ERP connections for pricing as the first steps to a successful release (depending on critical requirements).

BigCommerce's B2B toolset is simple enough for a quick release yet powerful enough to handle any requirement you may eventually have.

### Walk

Once the baseline is set and you transact orders, you will find areas to tune. Your original list of priorities is almost guaranteed to change. This stage involves implementing these core changes that will boost your conversion rate, user experience and sales personnel convenience. We also continue to improve your integrations to increase productivity.

### Run

Many businesses stay in the Walk phase—their websites perform well. However, it is in this final phase that significant additional value is realized. At this stage, SwiftOtter will leverage tools like A/B testing to ensure a highly-optimized experience. This is the phase where your tech stack can be leveraged to move into other markets or audiences.





# Administration

Both BigCommerce and Adobe Commerce get the job done. These are the “nuts and bolts” of the admin experience.

## What areas are functionally similar between BigCommerce and Adobe Commerce?

- Reporting
- Grid filters
- Custom grid views
- 2-factor authentication
- Access permissions (Adobe Commerce has slightly more granular permissions)
- Admin action logging (though, BigCommerce does not allow for exporting actions)
- Import/export entities

## What parts of our process may need adaptation when moving from Adobe Commerce to BigCommerce?

### **Control over which columns are visible in the admin grid**

BigCommerce does not yet provide a way to reduce the number of columns on a grid. We have yet to miss this feature—though it can be helpful to create targeted reports or views for permission-restricted administrators.

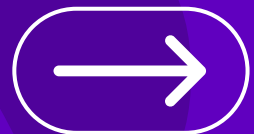
### **Import/Export Scheduling**

Adobe Commerce has a feature to import and export all available entities automatically. Again, honestly, we rarely see this used.

# Part 3

---

## Feature-Gathering Methodology



# Feature-Gathering Methodology

We have identified critical areas that will help facilitate a migration process with SwiftOtter and BigCommerce. As you will see, many cogs are involved with such a project. Working through this list should take less than an hour and will kickstart our conversations.

## Catalog

Roughly how many categories and products do you have?

Which product types do you use?  
Simple, configurable, grouped, bundle, virtual, downloadable, custom

Most complex product example URL:

Most common product example URL:

What types of products do you sell?

Describe the complicated aspects of products. Do you have configurators?

Describe your most complicated pricing scenarios.

Do you provide warranties or support?

What do you use for on-site search?

# Feature-Gathering Methodology

## Catalog

Is there anything else catalog-related that we should know?

## Customers

How many customers are currently registered?

Describe the primary users of the website?  
How would you break them into segments?

Who are the secondary users of the site, if any? Do you market to more than one audience?

What questions are asked in the account registration form?

Do your customers need to be approved before account creation? Before being added to a group?

Do they need to show any proof? (e.g. license, certificate, legal documents, etc.)

Is there anything else customer-related that we should know?

# Feature-Gathering Methodology

## Checkout

What is your average order size? What is your yearly online revenue?

Do you print Invoices?

Do you use BOMs (Bill of Materials)? Please describe how these are used in the order process (current & ideal state).

Are we migrating any Order data?

Is there anything else checkout-related that we should know?

## Taxes

Which service do you use to collect tax? Avalara, TaxJar, Vertex, etc.?

If you don't use a service, may we know why not?

Are all products taxable?

Do you need VAT set-up?

Is there anything else related to taxes we should know?

## Does this seem to complicated?

If you think this, you're not alone. This is the first part of discovering a project that may take months to build. You will gain significant clarity through these questions—and there are even a few more to ask.

SwiftOtter can walk you through this entire process.



# Feature-Gathering Methodology

## Shipping

What shipping carriers do you foresee using?

i.e. Fedex, UPS, USPS, DHL

Are there any unique shipping requirements related to your products?

i.e. dimensions, weight, handling fee, perishable items, controlled restrictions

Do you ship internationally? Do you have country/region restrictions? Any additional restrictions for international such as carrier, products, etc?

i.e. aerosols can't fly air service

Do you do drop shipping?

## Payments

Do you currently use a payment gateway? If so, which?

i.e. Authorize.net, Stripe, Braintree, Paypal, etc.

Which additional payment gateways do you want to use on the new site?

Do your customers use POs or BOMs?

Do you accept terms?

i.e. Net 30, COD, Offline payments, etc.

# Feature-Gathering Methodology

## Payments, continued

Do you currently use or want to use third parties that allow for payment installments?  
Afterpay, Klarna, Affirm, etc.

Do you have any subscriptions or auto fulfillment programs?

Is there anything else about shipping or payments we should know?

## Integrations

Which business system integrations will you need to connect to BigCommerce?

**ERP** i.e. Netsuite, Dynamics, Accumatica

**POS** i.e. Clover, Square

**CMS** i.e. Wordpress, Contentful

**CRM** i.e. Salesforce, Hubspot

**OMS** i.e. ShipStation, Ordoro

**DAM** i.e. Brightspot, Acquia DAM



# Feature-Gathering Methodology

## Integrations, continued

Which business system integrations will you need to connect to BigCommerce?

**PIM** i.e. SPS Commerce, Akeneo, PIMCore

**Help Desk / Call Center**

**Other**

Do you leverage 3rd party feeds or comparison shopping engines such as Google shopping, Bing Shopping, etc.? Please list each feed.

Do you sell via resellers or affiliates? Please list each one.

i.e. Amazon.com, Ebay.com, Walmart.com, etc.

Who is your email marketing provider?

i.e. MailChimp, Klaviyo, DotDigital, etc.

What analytics and business intelligence provider(s) do you use?

i.e. LuckyOrange, BI, Google Analytics, Hotjar, etc.

What do you use for your Marketing Automation Platform?

i.e. Marketo, HubSpot, Eloqua, Pardot, etc.

Do you use an online chat software? If yes, describe.

Will the site need to integrate to other systems? Please list:

# Feature-Gathering Methodology

## User Experience

What redesign strategy are you interested in?

i.e. full rebranding/refresh / happy with the overall look and feel but need UX updates

What sites do you like, want to use as a reference or inspiration? Please note which parts of these sites you like/dislike and why.

Do you have brand standards/guidelines? Are you looking for a brand refresh?

Do you have an in-house graphic designer? Will they be working on the website redesign?

Do you have a design/marketing firm managing your brand?

Do you have product images? Any plans to shoot new product images?

Do you have any ADA compliance requirements? If so, what level do you require?

i.e. Level A (minimum), Level AA (mid-range), Level AAA (highest)

Is there anything else design-related we should know?



# The End

**But not really. This is just the beginning  
for a beautiful, maintainable website.**

Let's chat!  
[joseph@swiftotter.com](mailto:joseph@swiftotter.com)

