



WooCommerce to → BigCommerce

The Ultimate Comparison and
Migration Quickstart

by Jon Guess



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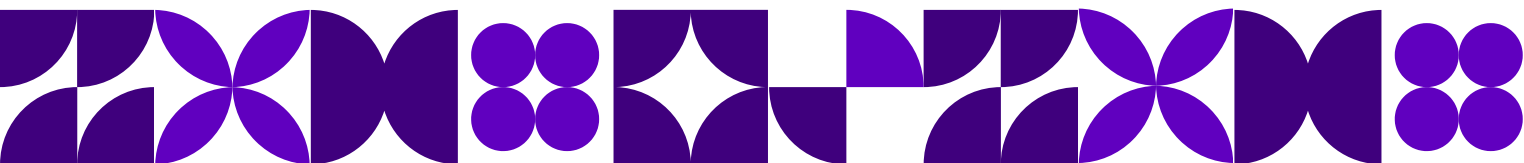
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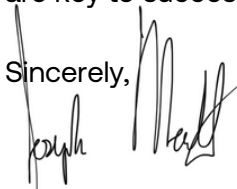
The key to a successful project is a well-defined start.

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 WooCommerce and BigCommerce (why do most platforms have “commerce” in their name?); 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 like SwiftOtter 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?

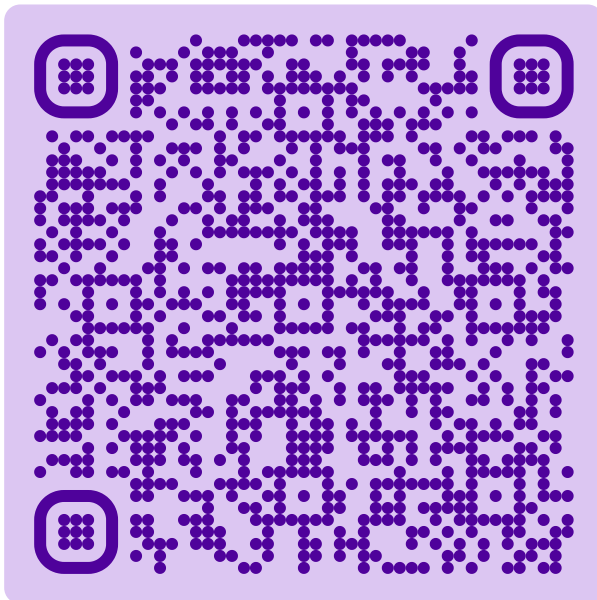
I have put massive effort into building this guide. If this is worth sharing, please share the link where this can be downloaded. Would you help me?

[Download this guide](#)



Shareable link:

<https://swiftotter.com/development/bigcommerce/woocommerce-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.

A WooCommerce 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.

Performance.

The number one complaint that we observe and hear with WooCommerce is performance. Few WooCommerce websites are considered fast. This means you always have a ceiling for growth. Marketing emails or special sales can bring the website to a crawl, frustrating customers and affecting sales (we've seen this over and over; we check, and yes, it's a WooCommerce website). To be clear, it is technically possible to host WooCommerce on an infinitely-scalable solution. However, to do so would require significant hosting costs.

BigCommerce is entirely scalable. You never have to worry about your website going down because your Black Friday sale is more popular than ever. The website is eliminated as a concern. The good news is BigCommerce charges fair pricing for their platform. When comparing apples and apples, well-hosted WooCommerce is not far from BigCommerce licensing. Additionally, many of the functions that require a plugin with WooCommerce are native in BigCommerce.

A better checkout experience.

5%

conversion rate increase
(estimated average)

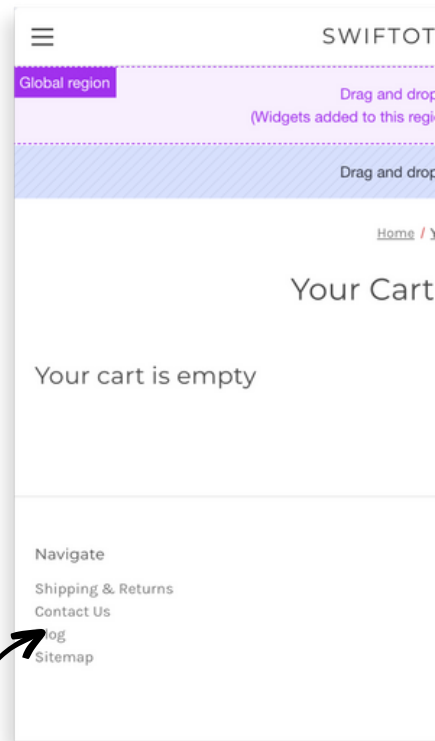
\$1,000,000

estimated revenue increase
based on \$20M revenue

BigCommerce's checkout is tailor-made for success.

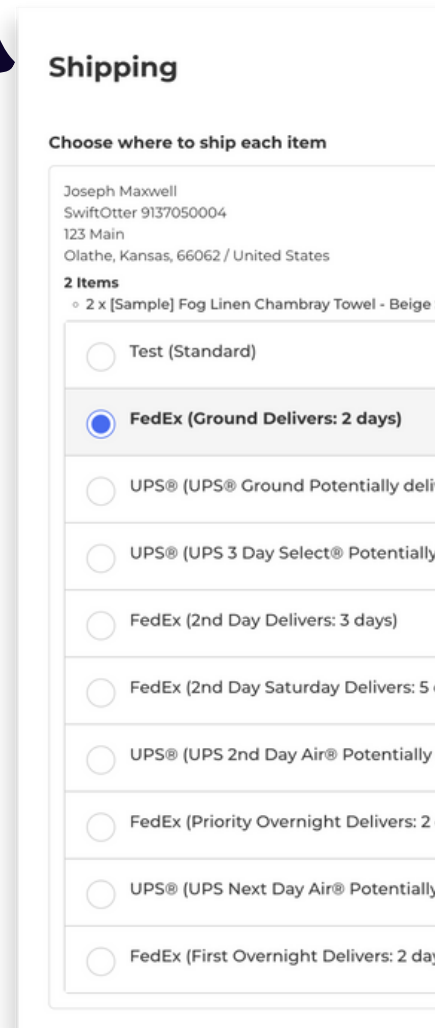
On BigCommerce, merchants realize significant opportunities:

- Native and well-refined multi-address support that allows easy per-destination products and shipping.
- Native order comments. Easily add custom checkout fields (B2B edition). With either option, the value is presented in the checkout, instead of on the cart page, which can be easily skipped over.
- BigCommerce offers native integration with 48 payment gateways.
- BigCommerce includes a license to ShipperHQ Essentials out of the box. This ensures accurate shipping prices and delivery times.



Excellent Page Builder tool

Multi-address support



The big 3.

A true B2B-enabled customer interface.

10%

conversion rate increase
(estimated average)

\$2,000,000

estimate revenue increase
based on \$20M revenue

BigCommerce has a robust B2B feature set. These are sure to fulfill frequent buyers' common needs, making them more likely to return.

- Visitors can request a trade professional account. Approving it is simple. Customers can also seamlessly register at will or by "force" in checkout.
- Order can be started by junior buyers, then approved and placed by administrators.
- Salespeople and potential buyers can leverage quotes to identify win-win pricing.
- Faster re-ordering through quick order and order lists. Buyers can easily identify what they've already purchased and add it to their car with one click.

While WooCommerce has B2B capabilities, BigCommerce beats this by a long shot.

Purchased products

7 products

Search

From
05/09/2023



Product



[Sample] 1 L Le Parfait Jar
SLLPJ



[Sample] Orbit Terrarium - Small
OTS



[Sample] Utility Caddy
OFSUC



[Sample] Canvas Laundry Cart
CLC



[Sample] Tiered Wire Basket
TWB



[Sample] Smith Journal 13

0 products selected

**Quick order function
in B2B portal**

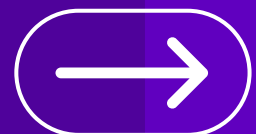
BONUS: The hurdles of addressing updates & security.

WooCommerce's flexibility often hinges on the integration of plugins to expand its features. These plugins, each developed by different creators, require regular updates to ensure compatibility with the latest version of WooCommerce and WordPress. Plugins are usually the entry point for a security breach.

In contrast, BigCommerce operates as a Software-as-a-Service (SaaS) platform, handling most of the technical aspects automatically. Being a hosted solution, BigCommerce updates and security measures are rolled out universally, without the merchant needing to manually intervene. This ensures that the platform remains up-to-date and secure, reducing the overhead and potential risks associated with managing multiple plugins, as is common with WooCommerce.

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.

WooCommerce websites can be intricate, often featuring custom elements and a large number of third-party apps. 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 WooCommerce website. Upon release, there is a final delta of customers and orders.



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.



The magical day of 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 WooCommerce and BigCommerce have different design paradigms. Making BigCommerce look like WooCommerce 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](#) [i](#)

WooCommerce

Argus All-Weather
\$18.00

Size

SKU: ARG-167 Category: [Men](#)

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.

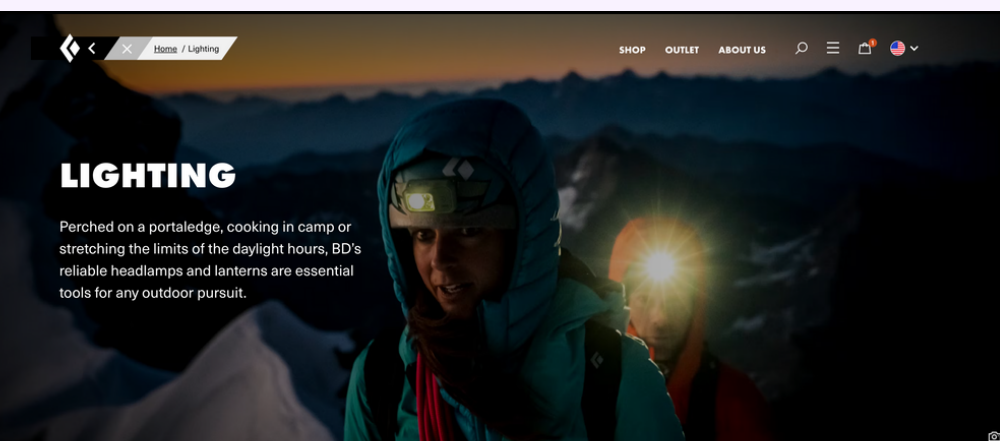
How BigCommerce makes this decision easy

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

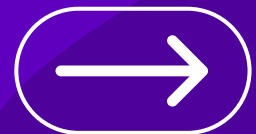


Black Diamond Equipment

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

Part 2

Growth Opportunities





Est. Min. Yearly Costs

Including maintenance, hosting and licensing fees; excluding build fees.

\$\$\$\$\$

\$\$\$\$\$

Est. Build Costs

\$\$\$\$\$

\$\$\$\$\$

Platform-style

Cloud-hosted

Open-source

Low Maintenance Cost

★★★★★

★★☆☆☆

Difficulty to breach security

★★★★★

★★☆☆☆

Ability to quickly handle large traffic influxes

★★★★★

★★☆☆☆

Multiple Storefronts

★★★★☆

★★☆☆☆

Support

★★★★★

★★☆☆☆

Operator Happiness

★★★★☆

★★☆☆☆

Catalog

Pre-orders

★★★★★

★★★☆☆

Downloadable Products

★★★★★

★★★★★

Gifting

★★★★☆

★★☆☆☆

Rich Attribute Types

★☆☆☆☆

★★★★★

Product Variations (limit)

★★★☆☆
600

★★☆☆☆
50

Price Lists

★★★★☆

★★★★★

Native Product Search

★★☆☆☆

★★☆☆☆



Product Relations

★★★★☆

★★★★☆

Category permissions

★★★★☆

★★★★☆

Auto-assembled categories

★★☆☆☆

★★★★☆

Page Builder

★★★★☆

★★★★☆

Inventory

Quantity Thresholds

★★★★★

★★★★★

Inventory Warehouse Tracking

X

★★★☆☆

Backorders

X

★★★★★

Customer Management

Customer Impersonation

★★★★★

X

Wishlists

★★★★☆

★★★★☆

Custom fields

★★★★★

★★★★★

Segmentation

★☆☆☆☆

★★★☆☆



Checkout

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	★★★☆☆	★★★☆☆



Setting the stage

WooCommerce operates as an open-source solution within WordPress, inherently suggesting its extensibility. In contrast, BigCommerce is a Software-as-a-Service (SaaS) platform. SaaS is a software distribution model where applications are hosted by a third-party provider and made available to customers over the internet. In the context of BigCommerce, it is known as an "open-SaaS" platform meaning it combines the ease and simplicity of SaaS with the extensibility and customization typically associated with open-source solutions, allowing for comprehensive modifications to meet individual needs. BigCommerce provides a robust API designed for superior extensibility and in-depth customization. This design means that almost every facet of BigCommerce can be tailored to individual preferences.

Where BigCommerce shines is in its ability to natively integrate many critical eCommerce functionalities, diminishing the need for external third-party applications that can entail extra monthly costs. This integrated approach positions BigCommerce as a more economically viable solution for running online businesses. Conversely, WooCommerce frequently leans on multiple third-party plugins to match such functionalities, potentially increasing the risk of accumulating technical complexities over time.

Assumptions

For the purposes of this feature comparison, we're operating under the assumption that merchants are presently utilizing WooCommerce with a B2B plugin and are contemplating a transition to BigCommerce Enterprise featuring the B2B Edition. Specifically, we've selected the "B2B for WooCommerce" plugin by Addify as our reference for this guide.

Licensing cost comparison



WooCommerce

Initial Costs: Being open-source, WooCommerce itself is free. However, expenses can arise from purchasing premium themes, plugins, and extensions to achieve desired functionalities.

Hosting Costs: Unlike BigCommerce, WooCommerce requires you to secure and pay for your own hosting. Depending on your website's traffic and requirements, hosting costs can range from a few dollars per month to hundreds for high-performance servers. You also have to choose whether or not your hosting includes managed care services, which can increase the pricing.

Plugin Costs: While the basic B2B for WooCommerce plugin by Addify comes at a yearly cost, there might be additional expenses for other plugins to enhance features. Given the reliance on plugins, it's not uncommon for a WooCommerce store to have recurring charges for numerous premium plugins.

Maintenance and Security: Open-source platforms often require more regular maintenance and security checks, potentially leading to added costs if you're hiring professionals.



BigCommerce

Initial Costs: BigCommerce is not free. It has a clear pricing structure, where you pay a flat monthly or yearly fee that includes hosting, upgrades, maintenance and security. This fee includes the majority of features merchants need, while still allowing for plenty of room for customization. The fee is based on order counts (not revenue), a very fair methodology.

Hosting Costs: None. This is included in the licensing fee.

Plugin Costs: We find that BigCommerce websites run a small percentage of the number of plugins. This increases stability and greatly reduces security threats.

Maintenance and Security: BigCommerce handles most maintenance and security protocols as part of their package, which can save businesses time and additional costs.



Catalog Management

BigCommerce excels over WooCommerce in catalog management. Noteworthy native features in BigCommerce include manual and automatic product relations, MSRP pricing with discount indicators, videos on product pages, and Open Graph integration. While WooCommerce requires third-party plugins for functionalities like pre-orders and product swatches, BigCommerce includes them natively. Despite shared features in both platforms, those transitioning to BigCommerce may need to adapt to differences in product relations, grouped products and attribute types.

What additional value does BigCommerce bring?

Product variants

BigCommerce permits as many as 600 variants for a product. While WooCommerce allows for unlimited variations, it is limited in that 50 variations can be created per run. Because WooCommerce is hosted, these variations begin to affect, potentially seriously, the performance. Consequently, many users often have to enhance the PHP memory allowance and extend the maximum runtime for PHP scripts on their server.

Product Relations

In BigCommerce, you have two options for showing related products on a product page: automatic or manual. In WooCommerce, automatic recommendations are not native. To automatically set product recommendations, you would need to leverage a third-party app.

MSRP Pricing

In BigCommerce, you simply set the MSRP and it appears on the frontend with a rich discount notice. WooCommerce would need an additional plugin or a chosen theme that includes this functionality.

Catalog Management

What additional value does BigCommerce bring? - continued

Product Images & Videos

Images can be uploaded and reordered and the thumbnail can be selected on both BigCommerce & WooCommerce. In BigCommerce, videos have their own place on product pages, instead of being integrated into the media gallery. You would need an additional paid plugin to integrate videos on the product page with WooCommerce.

Open Graph / Rich Data Integration

This is natively included in BigCommerce and would need an additional plugin in WooCommerce. BigCommerce provides the following for Open Graph:

- Object type
- Title
- Description
- Thumbnail image
- Price
- Currency
- Review stars and count

Pre-orders

In BigCommerce, there is rich support for pre-orders. You can choose the message to display until a specific date of your choosing. You would need an additional plugin to allow for pre-orders in WooCommerce.

Swatches

In BigCommerce, swatches are available for product variants out of the box. However, a developer would be needed to also show these colors on category pages. In WooCommerce, swatches for product variants require an additional plugin.

Gifting

In BigCommerce, administrators can choose whether to allow all Gift Wrapping, select options, or none. Gift Wrapping allows an image, price and a gift message. You would need an additional plugin to add gifting functionality to WooCommerce.

Catalog Management

What areas are functionally similar between BigCommerce and WooCommerce?

- Product Options / Add-ons
- Quantity discounts
- View product on storefront
- Downloadable products
- Back in Stock Alert
- Price Change Alert
- Product Visibility
- Attribute Groups
- Gift cards
- Excise Taxes (Bottle, WEEE, Recycling, etc.)
- One-click purchase
- Import / Export

What parts of our process may need adaptation when moving from WooCommerce to BigCommerce?

Product Relations

WooCommerce allows for related products, cross-sells & up-sells, while BigCommerce only has one product relations area per product. While both platforms show these areas on the PDP, most WooCommerce themes also show cross-sells in the cart area, which is a nice addition.

Grouped Products

BigCommerce does not have the capability to kit or group products out of the box, whereas WooCommerce does. However, there is an interesting technique to provide a selectable list of products in BigCommerce. By creating a Pick List, you can provide visitors a list of add-on products. Note that the quantity is locked at 1. If further customization is needed, SwiftOtter can help identify what is needed and locate the best solution.

Attribute Types

There is no concept of rich attribute value types in BigCommerce. However, BigCommerce's use case for Custom Fields is very different. Custom Fields only provide additional information to a product page and category pages—and are not used for variants (configurable products). In comparison, WooCommerce manages variants using a text field, but still a more conventional method.



Category Features

BigCommerce stands out from WooCommerce with its advanced category features. Notably, BigCommerce integrates the Page Builder into category pages for flexible editing and offers unique features like anchor child product aggregation and automated product lists based on brands. Plus, it supports SEO with canonical tags for categories and products by default. In contrast, WooCommerce typically requires plugins or custom coding for similar capabilities.

What additional value does BigCommerce bring?

Content Integration

While there is a description and image field on the category page for both BigCommerce & WooCommerce, a feature we love is the integration of Page Builder into the entire page in BigCommerce. This makes it easy to make changes using the default Page Builder widgets—and a developer can easily add more.

Anchor child product aggregation

In BigCommerce, this is controllable under channel settings. The default is to "Show products from child category if the current category is empty". There isn't a native WooCommerce function to control this, and custom code would be required to achieve this.

Auto-assembled Categories

In BigCommerce, administrators can automate product lists associated with particular brands, but not categories. While this is slightly limiting, the reality is that brands are the most prominent use case. Each brand can have a logo, URL, template, etc. Pages are Page Builder enabled for rich content. In WooCommerce, automated product lists for specific brands aren't natively supported. Instead, you would need to rely on third-party plugins to create brand-specific functionalities.

Category Features

What additional value does BigCommerce bring? - continued

Canonical

In BigCommerce, canonical tags for categories and products are default, with products displaying in the root path alongside breadcrumbs. WooCommerce, on the other hand, requires SEO plugins like Yoast for canonical tags. Displaying products with breadcrumbs in WooCommerce may need extra configuration or plugins to match BigCommerce's presentation.

What areas are functionally similar between BigCommerce and WooCommerce?

- Category filters
- Sort order controls
- Default product sort
- Number of products per category
- Category permissions

What parts of our process may need adaptation when moving from WooCommerce 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.

WooCommerce has this functionality built-in. 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.

Auto-assembled categories

In BigCommerce, you can only automate product lists associated with particular brands. While this is slightly limiting, the reality is that brands are the most prominent use case. In WooCommerce, you can create automatic collections based on product type, category, vendor, tag and more.

Who wrote this guide?

Hi, I'm Jon Guess, and I have a passion for all things eCommerce related. I enjoy teaming up with clients, getting to know their customers, learning about their industry, and helping their business grow.

Having spent over a decade immersed in the world of eCommerce, I've gathered a wealth of experience from both the merchant and agency sides of the industry. This has equipped me with a unique perspective on the dynamics of the merchant-agency relationship.

On the merchant side, I had the privilege of nurturing a B2B startup from its infancy, with zero initial revenue, to becoming a successful, multi-million-dollar venture. About three years ago, I moved to the agency side allowing me to delve into a variety of industries and help guide our clients to reach their own success stories. At SwiftOtter, we take great pride in not just executing tasks but in taking the initiative and steering the course of action.

I call Benton, KY home, where I live with my wife and our five wonderful children.

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



Jon Guess



Content Management

Content management systems (CMS) empower users to control, modify, and structure website content without delving deep into coding. Both BigCommerce and WooCommerce stand out as premier platforms, however, they possess distinct differences, particularly in their approach to content management.

What areas are functionally similar between BigCommerce and WooCommerce?

WooCommerce bolts onto WordPress, the most well-known content management interface on the internet. How does BigCommerce line up?

BigCommerce is tailor-made for eCommerce—whereas WooCommerce is a plugin for WordPress, tailor-made for content generation.

WooCommerce's content feature set is similar to BigCommerce. However, we do find the features to be implemented in a slightly richer way, with deeper support.

BigCommerce's page editor functions essentially on the frontend. WooCommerce's editor is operates on the backend.

In BigCommerce, you can easily create new areas on the page to edit on the frontend. In WooCommerce, you have to create a new field.

Both get the job done. BigCommerce makes the editing easier. WooCommerce provides broader capabilities.



Inventory Management

Both BigCommerce and WooCommerce offer essential inventory tools. BigCommerce excels with its user-friendly interface for bulk adjustments and integrates well with Product Information Management (PIM) systems for comprehensive solutions. While WooCommerce handles backorders and offers stock alerts, businesses seeking streamlined operations often find BigCommerce, especially with PIM integration, to be the superior choice.

What areas are functionally similar between BigCommerce and WooCommerce?

- Inventory management
- Purchase Thresholds
- Quantity increments

What parts of our process may need adaptation when moving from WooCommerce to BigCommerce?

Backorders

Although BigCommerce offers a grid for bulk inventory adjustments—a highly useful feature—it does not allow administrators to input negative quantities. This means if a product runs out of stock, backordering isn't possible; the add-to-cart option just vanishes. On the other hand, WooCommerce supports backorders right from the start.



Inventory Management

What parts of our process may need adaptation when moving from WooCommerce to BigCommerce? - continued

Out of Stock Threshold

When the quantity is 0 in BigCommerce, the product is simply considered as out of stock. WooCommerce, by default, lets customers sign up to be notified when a product is restocked.

Credit Memo Returns Product to Stock

In WooCommerce, when processing a refund, you have the option to restock products by ticking the “Restock refunded items” box. In BigCommerce, this is controlled globally in the Inventory configuration.



Customer Management

BigCommerce offers features like allowing administrators to impersonate customers, built-in customer group functionalities for tailored discounts, and passwordless email authentication. It also natively tracks store credits. In comparison, WooCommerce often relies on additional plugins for such capabilities, with impersonation and native store credit tracking being notable absences.

What additional value does BigCommerce bring?

Impersonation

BigCommerce allows administrators to log in as the customer and browse the website as if a customer is browsing the website. WooCommerce doesn't have this native functionality without adding an additional paid plugin.

Customer Groups

BigCommerce has built-in capabilities for creating customer groups right from its admin panel. This means businesses can quickly set up and categorize customers without needing additional plugins or extensions. They can also specify category/product/storewide discounts. Price lists use customer groups, but the discount must be set per product. Customer groups are also used for taxes and promotions. WooCommerce needs an additional paid plugin to extend this functionality and match what BigCommerce has to offer.

Passwordless / Social Login

BigCommerce has the capability to send an email as a form of authentication where WooCommerce does not. However, Social Logins are not native functionality in either BigCommerce or WooCommerce.



Customer Management

What additional value does BigCommerce bring? - continued

Store Credit

BigCommerce tracks store credit, but just as a number. There is no automatic history or notifications. WooCommerce needs an additional paid app to track store credit.

What areas are functionally similar between BigCommerce and WooCommerce?

- Segmentation
- Guest Checkout
- Additional customer fields
- Administrators can edit cart contents
- Login management
- Wishlists



Checkout

BigCommerce excels in the checkout realm, offering native capabilities such as order address auto-complete and an intuitive multi-address checkout process. Additionally, it integrates a refined shipping solution with ShipperHQ Essentials (included in Enterprise plans) and centralizes currency management, elevating the international shopping journey. Conversely, WooCommerce is more plugin-reliant for features like multi-address checkout and intricate currency handling. While this can provide adaptability, it also necessitates added configuration and personalization.

What additional value does BigCommerce bring?

Order Address Autocomplete

BigCommerce natively supports order address auto-complete, streamlining the checkout process by suggesting addresses as customers type. In contrast, WooCommerce requires a third-party plugin to achieve this functionality.

Multi-address

This is a nicely-refined area of BigCommerce's capabilities. Customers can select multiple addresses without leaving the checkout process. You would need an additional plugin to extend this functionality in WooCommerce.

Checkout

What additional value does BigCommerce bring? - continued

Shipping Methods

BigCommerce offers an integrated license for ShipperHQ Essentials, which provides advanced shipping options, even for LTL freight, and supports package calculations. Conversely, WooCommerce relies primarily on plugins for advanced shipping functionalities. While it offers basic shipping methods out of the box, to achieve a level of sophistication similar to ShipperHQ, one would need to explore additional plugins or extensions.

Internationalizing Payments

BigCommerce allows unique currency configurations per payment method but lacks region-specific customization. In contrast, WooCommerce requires a range of plugins and extensions to accomplish this.

Currency Handling

BigCommerce provides a centralized currency management system, allowing for default currency conversions and user-specified conversion rates. Payments can be tailored based on the used currency, and customers are notified of any conversions. On the other hand, WooCommerce relies on plugins for multi-currency features, supporting various currencies with adjustable conversion rates. Additional configurations or plugins might be needed to align payment gateways with the multi-currency setup.

What areas are functionally similar between BigCommerce and WooCommerce?

- Terms and Conditions
- Order Comments
- Split payments
- Partial invoices
- Digital wallets
- Online payment providers



Order Workflows

BigCommerce and WooCommerce differ in their order workflow approaches. BigCommerce provides flexible order status renaming, draft order creation, RMA, and easy invoice generation natively. WooCommerce, being open-source, relies on plugins for similar functionalities but offers greater customization flexibility. Choosing between them depends on business needs, preference for built-in or plugin features, and available customization resources.

What additional value does BigCommerce bring?

Order Statuses

The system selects order Status in both WooCommerce & BigCommerce. However, the user has the capability to rename the Status as desired in BigCommerce.

Reorder / Duplicate / Copy Order

There is no capability to duplicate an order in the Admin area of either WooCommerce or BigCommerce. However, in BigCommerce, you can navigate to a customer and log into (impersonate) their account. You can then Reorder the order. This is made even easier in the B2B edition.

Generating PDF invoices

In BigCommerce, you can easily locate the PDF Invoice generation on the order actions menu. A developer is required to change the look and feel, but this is a trivial task. In WooCommerce, generating PDF invoices is typically handled through third-party plugins.

Custom Shipping Rates (Admin)

Within the BigCommerce admin interface, administrators have the convenience of specifying a shipping method name and its associated cost directly when creating or editing an order—a handy feature indeed! Meanwhile, in WooCommerce, one would need an additional module to grant the admin the same capability to set distinct rates for an individual order.

Order Workflows

What additional value does BigCommerce bring? - continued

Customer-completed orders

In BigCommerce, the administrator can create a new order, flag it as a draft, then send a link to the customer to complete the order - another nice feature! This makes it easy for the customer to review what was ordered. In WooCommerce, a plugin would be required.

Exporting orders

In BigCommerce, administrators have the capability to export either a specific list of orders or the entire order list. Additionally, they can customize the export by specifying which columns to include, such as product and customer details. For convenience, these configurations can be saved as presets for subsequent exports. Conversely, in WooCommerce, while exporting all orders is straightforward, the platform does not provide built-in options to select a subset of orders or to choose specific columns for export. Plugins would be necessary to extend this functionality.

How do customers return products?

BigCommerce has RMA capabilities. Administrators can customize the values of these fields. Administrators then assign statuses to returned items. They can issue store credit, or manually create a credit memo. In WooCommerce, RMA functionalities aren't built into the core platform. Instead, store owners need to rely on plugins or extensions to add this capability. Once added, administrators can manage returns, adjust statuses, and issue refunds or store credits, but the depth of customization and workflow largely depends on the specific plugin or extension chosen.

Order Workflows

What additional value does BigCommerce bring?

- continued

How are refunds processed?

In BigCommerce, store administrators can refund specific items, all or part of the shipping amount or order total. They can also adjust the final refund total for a restocking fee. They can also add comments to the return. The returned value can be returned online through the original payment provider, to store credit or offline. In WooCommerce, store administrators have the flexibility to process refunds directly from the order management dashboard. They can issue full or partial refunds for items, shipping costs, and even apply discounts or fees before finalizing the refund amount. Refunds can be processed through the original payment gateway or manually offline. Additionally, notes or reasons for the refund can be added to the order for record-keeping.

What areas are functionally similar between BigCommerce and WooCommerce?

- Grid filters
- Order view
- Resend order email
- Edit order
- Order notes and customer-facing comments
- Minimum order

What parts of our process may need adaptation when moving from WooCommerce to BigCommerce?

Order view extensibility

WooCommerce stands out for its adaptability, thanks to its open-source roots. In areas like the order view, WooCommerce can be easily customized. While BigCommerce has a robust API, tapping into these capabilities is likely to require extra budget. While BigCommerce is comparable to WooCommerce in terms of flexibility, achieving this may call for a greater commitment of resources.

Order Workflows

What parts of our process may need adaptation when moving from WooCommerce to BigCommerce? - continued

Order statuses

In BigCommerce, the system selects the order Status. The user has the capability to rename the Status as desired and the user can change the order's Status—however the system will still override the manually-selected status. There is no "On Hold" status, however "Declined" can be renamed. WooCommerce offers enhanced adaptability for order statuses. Users can both rename existing statuses and introduce new custom ones. Moreover, WooCommerce natively provides statuses like "On Hold" and, through custom post types, empowers store owners with granular control over the order process without any system-induced changes.

Extensibility

In BigCommerce, customizing the business logic behind orders or the order display are two of the few areas that represent a significant expense. It's impossible to add custom features to the existing BigCommerce order view. If changes are necessary, your developer will create a new application that lives in the left sidebar. This would somewhat or entirely replace the default order view. The downside of a partial replacement is you have to go to two places to manage an order. Building the new order area will represent more work than simply customizing what's already there. The good news is that all of this is available through the API. In WooCommerce, the open-source nature of the platform allows for deeper customization directly within the order view. Developers can modify or extend the existing order functionalities without the need for separate applications. This provides a more cohesive and integrated experience, enabling store owners to manage orders in one place.



Marketing

BigCommerce offers built-in marketing tools like notification banners, swift 301 redirects, and targeted abandoned cart emails, giving it an edge over WooCommerce. While WooCommerce has some features, it often leans on external plugins to achieve similar functionality. Though both platforms provide product discounts and email customization, BigCommerce's integrated approach is more streamlined. Those shifting from WooCommerce to BigCommerce might miss the auto-generate coupon codes for email campaigns and need a slight adjustment.

What additional value does BigCommerce bring?

Notification banners

In BigCommerce, two features provide this functionality.

Administrators can leverage the Marketing > Banners tool to register content at the top of the page. This feature is limited to the home page, a specific category, brand or a search results page. This content can be scheduled. However, we would recommend that you contact SwiftOtter to add a Global region to the top of the page so Page Builder can leverage this space. In WooCommerce, you will need a plugin to add this functionality.

Abandoned cart emails

In BigCommerce, administrators can configure emails to be sent at a particular interval (one interval per email). Templates are easily configurable. No rules or filtering is possible. Emails can feature a coupon code. In WooCommerce, you would need a plugin to add abandoned cart email notifications.

Marketing

What areas are functionally similar between BigCommerce and WooCommerce?

- Product discounts
- Discount scheduling
- Buy X, Get Y Off
- Notification banners
- Personalizing Content
- Redirects
- Email customization
- Abandoned Cart Emails

What parts of our process may need adaptation when moving from WooCommerce to BigCommerce?

Coupon codes

Both have similar capabilities with custom coupon codes, but WooCommerce does allow administrators to auto-generate coupon codes, which is not present in BigCommerce. This can help integrate email campaigns to determine how many are being used.



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's B2B Edition offers superior features compared to B2B for WooCommerce by Addify. Notably, BigCommerce boasts an advanced address management system, payment method restrictions for company accounts, a multi-layered order approval process, and robust pay-on-account features. While BigCommerce enables quick reordering, sales staff assignments, and utilizes ordering lists, many of these capabilities aren't natively present in B2B for WooCommerce. Achieving similar functionalities in WooCommerce often requires additional paid plugins or custom code, highlighting BigCommerce's comprehensive B2B offerings.

What additional value does BigCommerce bring?

Address management

In BigCommerce, store administrators can select how addresses are shared and managed between company users. B2B for WooCommerce does not have multiple company users within the same company account.

Payment/Shipping method restrictions

In BigCommerce, you can allow payment methods per company account, but not for shipping methods. With B2B for WooCommerce, you can select which payment & shipping methods are available to all B2B accounts versus DTC accounts, but you cannot control this at the individual company level.

B2B Features

What additional value does BigCommerce bring? - continued

Order approvals

BigCommerce implements a layered purchasing process in its B2B module. Junior buyers are not authorized to directly make purchases. Instead, they have the ability to add products to a shopping list, which they then forward for approval. The responsibility of reviewing these lists, adding the selected products to the cart, and finalizing the order falls on the Company administrator. This process ensures a check and balance system within the company's purchasing mechanism. In contrast, WooCommerce B2B doesn't provide functionality for multiple users within a company account and thus doesn't include an order approval process.

Pay on account/net terms

At the time of writing, Invoices are not possible with the new B2B User Portal. BigCommerce has the backend infrastructure, but this still needs to be exposed on the frontend. BigCommerce tracks payment terms. Customers can pay invoices directly on the website. This will be a robust feature when it is made available, so we are still including this functionality as an additional value. B2B for WooCommerce does not have this functionality.

Quick order

BigCommerce B2B Edition doesn't necessarily have quick order, but it does have a useful feature in that it shows a list of previously-ordered products (along with the date it was ordered). This allows for a quick, ad-hoc reordering process. B2B for WooCommerce does not have this native functionality and would require an additional paid plugin.

B2B Features

What additional value does BigCommerce bring? - continued

Sales staff assignment

Once salespeople have accounts for the BigCommerce store, they can then access the B2B Edition app. Store administrators will create each salesperson an account on the B2B Edition and assign them to specific companies that they can then manage. B2B for WooCommerce does not have this native functionality and would require an additional paid plugin.

Ordering lists

With the B2B Edition in BigCommerce, shopping lists provide a list of products that can be ordered. If a Junior Buyer creates a list, they must escalate to an administrator. However, these are not technically shareable. B2B for WooCommerce does not have this native functionality and would require an additional paid plugin.

What areas are functionally similar between BigCommerce and WooCommerce?

- Price Lists
- Product restrictions
- B2B workflow
- Company registration
- Company management
- Additional fields in Checkout
- Quotes



Administration

BigCommerce offers notable administrative benefits over WooCommerce, particularly in user features and security. Both platforms handle reports, grid filters, and roles similarly. However, BigCommerce uniquely offers saved grid views, 2-factor authentication, and precise administrative action logs. While WooCommerce is robust, some advanced features necessitate third-party plugins.

What additional value does BigCommerce bring?

Save grid view

BigCommerce offers the ability to create a custom view with advanced search and sort order within the orders grid. WooCommerce doesn't have this functionality.

2-factor authentication

BigCommerce supports 2FA through authenticator codes (Google Authenticator, but this also works with 1Password and LastPass), Duo and Authy. They also support email verification. WooCommerce does not offer this functionality natively and would require an additional third party plugin.

Admin actions logging

BigCommerce logs all admin actions into a searchable grid. Unfortunately, these logs are not exportable. WooCommerce does not offer this functionality natively and would require an additional third party plugin.

What areas are functionally similar between BigCommerce and WooCommerce?

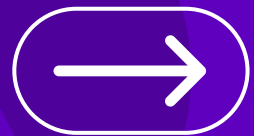
- Predefined reports
- Grid filters
- Columns
- Access roles
- Import/Export
- Import/Export Scheduling
- URL control

Part 3

Feature-Gathering Methodology



SwiftOtter



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

