

Magento  
Enterprise Edition  
**User Guide**

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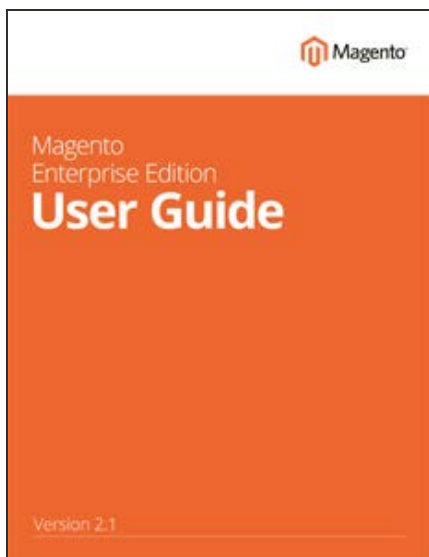
## About This Guide

This guide answers the “why, where, and how” questions that most merchants have when learning to use Magento. You’ll find lots of step-by-step instructions, screenshots and examples, plus a comprehensive online [configuration reference](#) that is linked throughout the material. After learning the basics, you can use this guide as a springboard to more advanced topics and resources.



### Online User Guide

The online (HTML) guide is the primary user documentation for the current release of Magento Commerce. The content is continually updated to provide you with the best possible assistance. To learn about recent additions or changes to existing topics, see the [Change Log](#) at the end of the guide.



### PDF User Guide

You'll find the same great information in the PDF user guide, based on the date last updated. Simply click the link to open the PDF in your browser. You can also right-click the download link to save the file to your computer. See the [Documentation Archive](#) for previous versions of the user guide. Updated: March 2019



# GETTING STARTED



## Contents

This section of the guide provides an overview of the resources that are available to you as a member of the Magento community. You'll learn about the current release, and how to log into your Magento account. Finally, you'll take a guided tour of Magento from two different perspectives, with links you can explore to learn more about each topic.

### Welcome

- About This Guide
- Resources
- Join the Conversation!

### About This Release

- System Requirements
- Installation
  - Prelaunch Checklist
  - Your Login Credentials
  - For Your Records

### Your Magento Account

- Creating a Magento Account
- Sharing Your Account

### Quick Tour

- Path to Purchase
  - Home Page
  - Catalog Page
  - Search Results
  - Product Page
  - Shopping Cart

### Customer Journey

- Attract New Customers
- Engage Your Customers
- Moment of Purchase
- Increase Average Order Value
- Customer Retention
- Loyalty & Advocacy
- Success!

### Basic Configuration



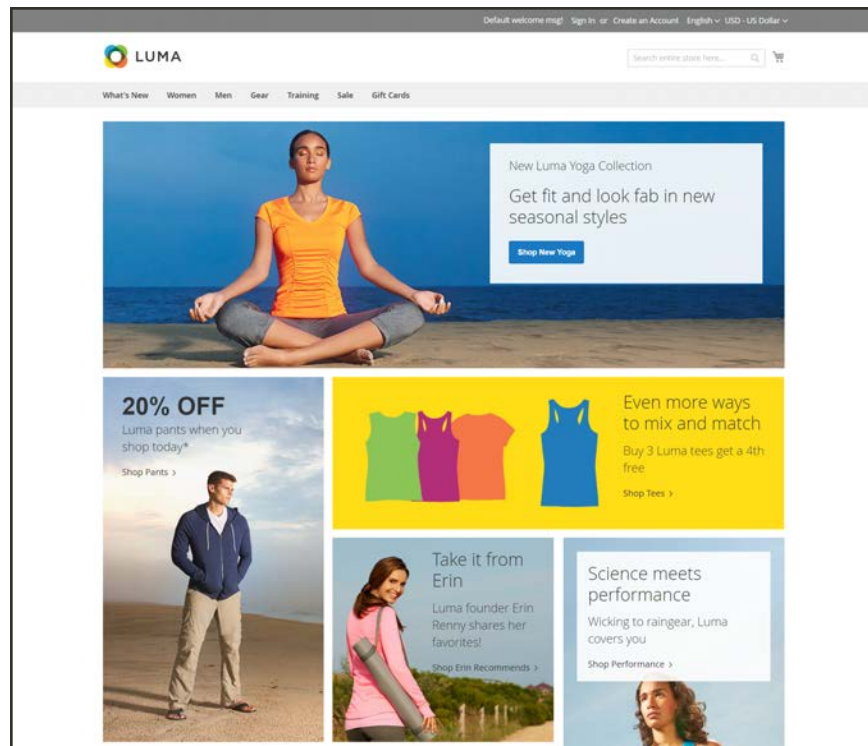




## CHAPTER 1:

# Welcome

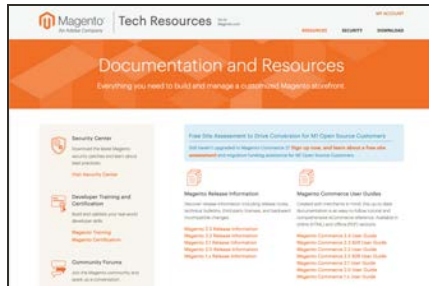
Welcome to the next generation of the world's leading digital commerce platform! Built on open-source technology, Magento Commerce provides online merchants with unparalleled flexibility and control over the look, content, and functionality of their online stores. Magento's intuitive Admin features powerful marketing, search engine optimization, and product management tools that give you the power to create sites that are tailored to your unique business needs. Robust and scalable, Magento offers you a stable, secure, and customizable solution for your growing business.



*Home Page*

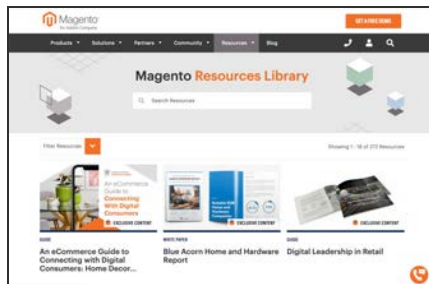
## Resources

Magento provides a wealth of business and technical resources, self-help tools, and services to help you succeed.



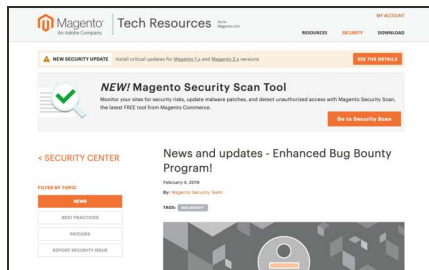
### Product Documentation

Whether you're a merchant, designer, **developer**, or all of the above, this is where you'll gain a deeper insight into how you can leverage the power of Magento to grow your business.



### Magento Resources Library

Gain access to expert insight and online business resources to help develop and improve your store. Ebooks, Magento whitepapers, and webinars.



### Security Center

Join Magento's Security Alert Registry to get the latest information on potential vulnerabilities and **Security Best Practices**.



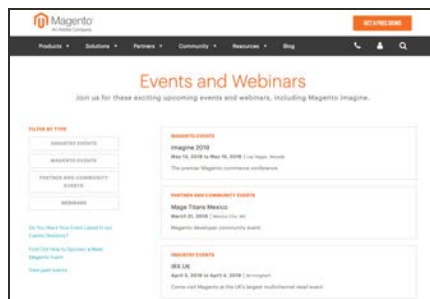
### Forums

The Magento forums provide access to a network of dedicated Magento enthusiasts who share tips, tricks and support.



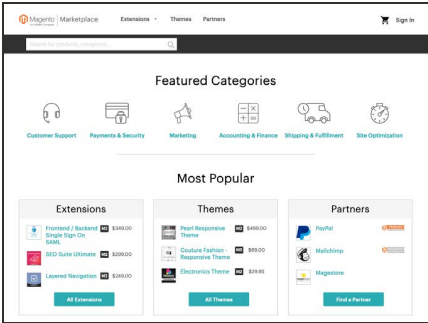
## Blog

Check out the Magento blog for the latest information about new features, trends, best practices, upcoming events, and more!



## Events and Webinars

Keep tabs on our calendar of upcoming events and webinars. There's always something happening in the Magento ecosystem!



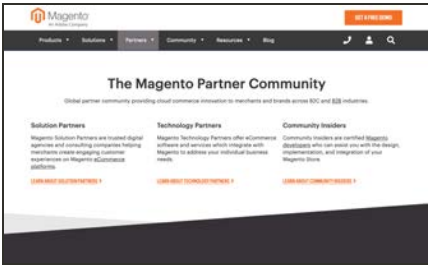
## Magento Marketplace

Visit Magento's next-generation marketplace of digital commerce solutions. Magento Marketplace offers merchants a curated selection of solutions, while providing qualified developers the tools, platform, and prime location for a thriving business.



## Training & Certification

Learn how to unleash the power and flexibility of Magento. We provide training for every role in your business, including marketers, designers, developers, and more. Experienced Magento professionals can validate their real-world skills by earning Magento certification.



## Partners

Magento partners are committed to your success, and provide custom integrations, best-in-class customer experiences, strategic marketing initiatives, and expert performance and scalability optimization for both on-premise and cloud-based solutions.



## Expert Consulting Services

Our Expert Consulting Group (ECG) helps Magento merchants and Solution Partners maximize their success. Our experts offer comprehensive analysis and best practice recommendations, from architecture planning through post-deployment.

## Join the Conversation!

Keep up with the latest news from the ecosystem, and connect with other merchants and developers on social media networks.



### Magento Forums

This is the place to find solutions, become acquainted with international communities, and join a special interest chat! Share your knowledge and earn kudos from others!



### Facebook

Find out what's happening and join the discussion on our Facebook page!



### Twitter

Follow us on Twitter!



### LinkedIn

Join a Magento group on LinkedIn.





## Google+

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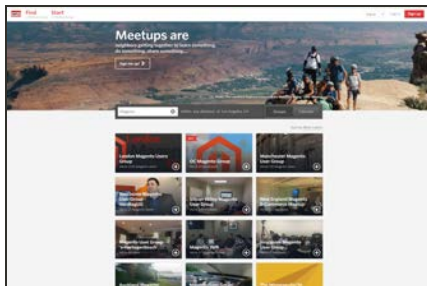
Add us to your circle on Google+.



## YouTube

---

Learn while you watch videos on our YouTube channel!



## Meetup

---

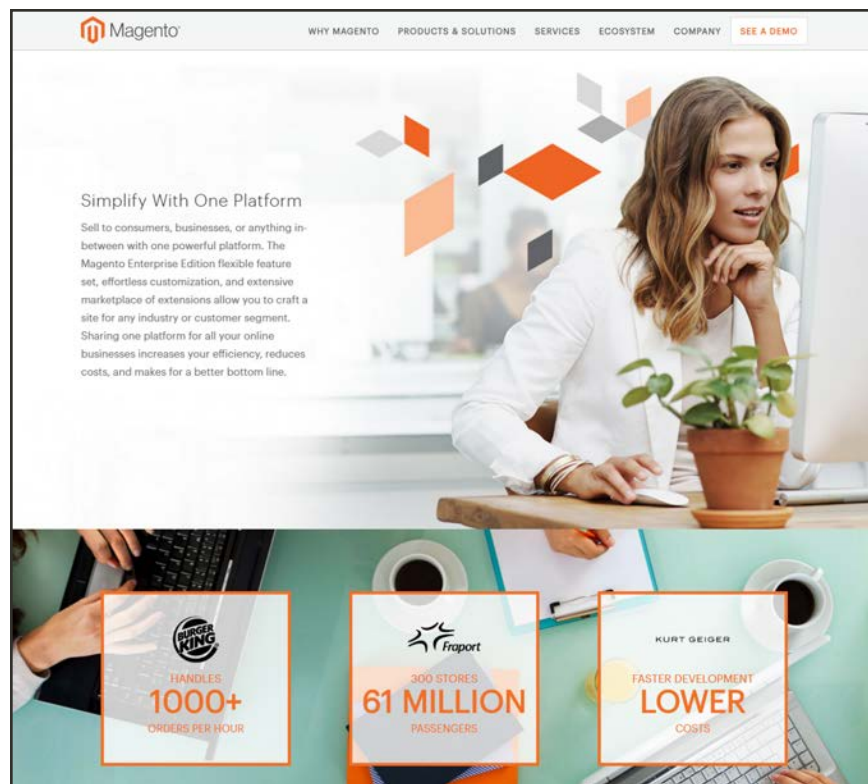
Find a Magento Meetup near you!



## CHAPTER 2:

# About This Release

As a best practice, we recommend that you keep your Magento installation up to date, so you can benefit from the latest advancements. Release notes provide a detailed description of the changes in each product release, with links to additional technical information, installation instructions, and support resources. To learn more about current and past releases, see [Release Information](#) for all 2.1.x Magento versions.



*Magento Enterprise Edition*

# Installation

To download and install the latest release of Magento 2.1.x on your server, see the [Installation](#) and [Configuration](#) in our technical documentation. The Magento installation can be deployed to run in either production or developer mode. Some tools and configuration settings are designed specifically for developers, and can be accessed only while the store is running in developer mode. To learn more, see [Magento Modes](#).

The Magento installation guide provides multiple options including download zip file, Composer, and cloned code repository. We recommend reviewing the following information:

- [System requirements](#)
- [Prerequisites](#)
- [Installation roadmap](#)
- [Post Installation](#)

To update an existing installation, see [Web Setup Wizard](#) in the System section of this guide.

## Prelaunch Checklist

After you complete the design, development, and testing of your store, check the following configuration settings to make sure everything is correct before the store “goes live.” For a comprehensive description of every configuration setting, see the [Configuration Reference](#).

### General Settings



#### Store URLs

Verify that the store URLs for the storefront and Admin are correct for a live production environment.



#### Security Certificate

Before launching your store, install a 100% Signed and Trusted Security Certificate for the domain specified in the Base URL.



#### Store Email Addresses

Complete all the email addresses that are used to send and receive email notifications, such as new orders, invoices, shipments, credit memos, product price alerts, newsletters, and so on. Make sure that each field contains a valid business email address.

### Marketing Settings



#### Email Templates

Update the default email templates to reflect your brand. Make sure to update the configuration if you create new templates.



#### Sales Communications

Make sure that your invoices and packing slips include the correct business information and reflect your brand.



#### Google Tools

Magento is integrated with Google API to allow your business to use Google Analytics and Google AdWords.

## Sales & Marketing Settings



### Cart Options

Take a look at the cart configuration settings, to see if there's anything that you want to change. This is where you can set the minimum order amount and lifetime of the prices in the cart.



### Checkout Options

Take a look at the checkout options, to see if there's anything that you want to change. This is where you can set up terms and conditions, and configure guest checkout.



### Taxes

Make sure that taxes are properly configured according to your business tax rules and local requirements.



### Shipping Methods

Enable all carriers and shipping methods to be used by the company.



### PayPal

If you plan to offer your customers the convenience of paying with PayPal, open a PayPal Merchant Account, and set up a payment method. Run some test transactions in Sandbox Mode before the store goes live.



### Payment Methods

Enable the payment methods that you plan to use, and make sure that they are properly configured. Check the order status settings, accepted currency, allowed countries, and so on.

## System Settings



### Cron (Scheduled Tasks)

Cron jobs are used to process email, catalog price rules, newsletters, customer alerts, Google sitemaps, update currency rates, and so on. Make sure that Cron jobs are set to run at the appropriate time interval, in minutes.

## Your Login Credentials

Before you go any further, make sure that you have the information that you need to access the Admin of your store, and your Magento account.



### Storefront URL

The address for your storefront is usually the domain that is assigned to your IP address. Some stores are installed the root, or topmost directory. Others are installed in a directory below the root. Your store might be located in a subdomain that is associated with your primary domain. Your store URL might look like one of the following:

`http://mydomain.com`

`http://www.mydomain.com/mystore`

`http://www.mydomain.com/mystore`

`http://xxx.xxx.xxx.xxx`

If you don't yet have a domain, your store URL will include a series of four numbers, each separated by a period in "dotted quad" notation.



### Admin URL

The address for your store Admin was set up during the installation. The default address is the same as your store, but with `/admin` at the end. Although the examples in this guide use the default directory, we recommend that run your Admin from a location that is unique to your store.

`http://mydomain.com/admin`

`http://www.mydomain.com/admin`



### Magento Account

Your Magento account provides access to information about your products and services, account settings, billing history, and support resources. to access your account, visit the Magento site and click the My Account link in the header.



### Customer Account

While you're learning your way around the store, make sure to set up a test **customer account**, so you can experience the store and checkout process from the customer's perspective.

## For Your Records

As a best practice, keep a record of the details of your installation, your login credentials, and the email address that is associated with each account. You can print this page, write down your credentials, and keep it in a safe, convenient place.

### Store and Admin

Store URL:

---

Admin URL:

---

Admin User Name:

---

Admin Password:

---

Admin Email Address:

---

### Magento Account

User Name:

---

Password:

---

Email Address:

---

### Test Customer Account

User Name:

---

Password:

---

Email Address:

---

### Installation Information

Installation Date:

---

Magento Version:

---

Encryption Key:

---

Database Name:

---

Database User Name:

---

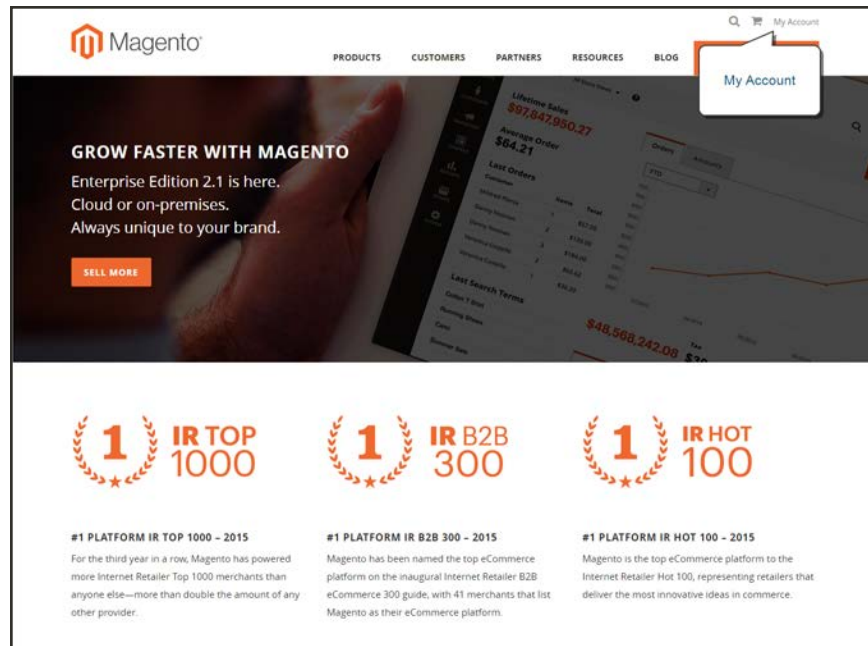
Database Password:

---

## CHAPTER 3:

# Your Magento Account

Your Magento account has a separate login from your store, and can be accessed from either the Magento website or from your store's Admin. From the dashboard of your Magento account, you can find information that is related to the products and services that you have purchased, as well as your contact and billing information.



*Your Magento Account*



## Creating an Account

Anyone can open a free Magento account from our website. The email address that is used to open a Magento account can be associated with only one account, and the screen name that you enter becomes your identity in the Magento forums.

### To create a Magento account:

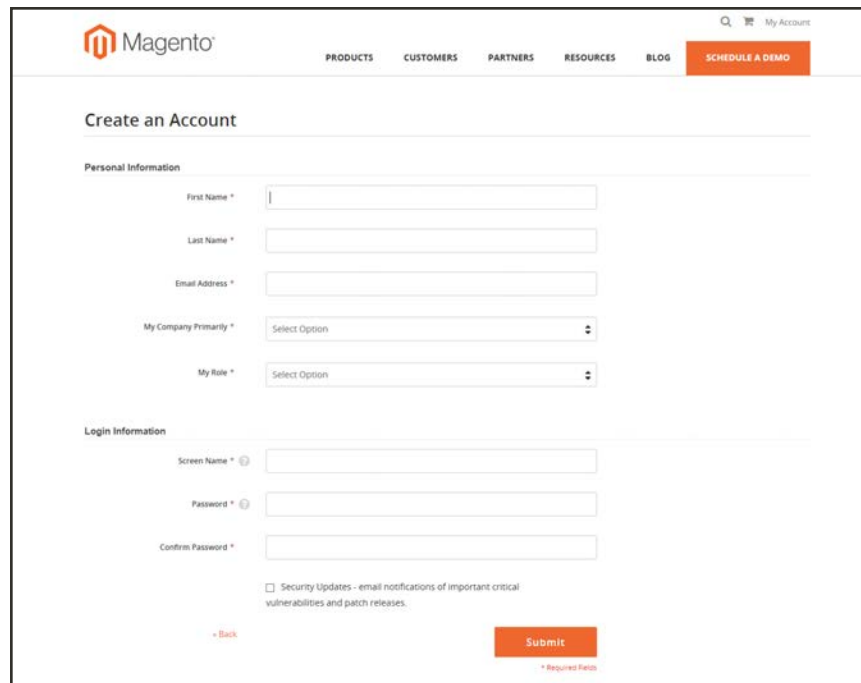
1. Visit the Magento site at: <http://www.magento.com>
2. In the upper-right corner, choose **My Account**. Then under New Customers, tap **Register**.

*Log In to Your Account*

3. Under Personal Information, do the following:
  - a. Enter your **First Name**, **Last Name**, and **Email Address**.
  - b. Set **My Company Primarily** to the best description of what your company does. Then, set **My Role** to the best description of what you do for the company.
4. Under Login Information, do the following:
  - a. Enter a **Screen Name** to identify you in the [Magento Community Forums](#).

Your screen name can be from four to fifteen characters long, can include numbers and the underscore, but must start with a letter.
  - b. Enter a **Password** for your account. Then, enter it again to confirm.

Your password can be from eight to sixteen characters long, and must include at least one capital letter, one number, and one special character or one lowercase letter.
  - c. When complete, tap **Submit**. Your account dashboard appears.

The image shows the 'Create an Account' page on the Magento website. At the top, there is a navigation bar with the Magento logo, links for PRODUCTS, CUSTOMERS, PARTNERS, RESOURCES, and BLOG, and a 'SCHEDULE A DEMO' button. Below the navigation bar, the page title 'Create an Account' is displayed. The form is divided into two main sections: 'Personal Information' and 'Login Information'. The 'Personal Information' section includes fields for First Name, Last Name, Email Address, My Company Primary, and My Role, each with a dropdown menu. The 'Login Information' section includes fields for Screen Name, Password, and Confirm Password. There is a checkbox for 'Security Updates - email notifications of important critical vulnerabilities and patch releases'. At the bottom of the form, there is a 'Back' link and a 'Submit' button. A small note at the bottom right indicates '\* Required Fields'.*Create an Account*

### To log in to your Magento account:

1. Go to the Magento site: <http://www.magento.com>
2. In the upper-right corner, click **My Account**.
3. Enter the **Email** address that is associated with your account. Then, enter your **Password**.
4. When complete, tap **Login**.

### To receive a new password:

1. If you forget your password, click **Forgot Your Password?**
2. Enter the **Email Address** that is associated with your account, and tap **Submit**.

You will receive an email from Magento with a temporary password that you can use to log into your account. Then, reset your password from the dashboard of your account.

### To reset your password:

1. Log in to your Magento account.
2. In the panel on the left, choose **Account Settings**. Then, tap **Change Password**
3. Enter your **Current Password**.  
If you forgot your password, enter the temporary password that was sent to you.
4. Enter your **New Password**. Then, enter it again to confirm.

Your Magento password must be between 8-16 characters, and include at least one capital letter, one number, and one special character or lowercase letter.

5. When complete, tap **Save**.

The screenshot shows the Magento 'My Account' page. The top navigation bar includes links for PRODUCTS, CUSTOMERS, PARTNERS, RESOURCES, and BLOG, along with a 'SCHEDULE A DEMO' button. The 'My Account' section has tabs for 'Magento', 'Connect', 'Partner Portal', and 'Marketplace'. The 'Magento' tab is active, showing the user's ID (MAG000000001) and a 'Log Out' link. A sidebar on the left lists 'My Products and Services', 'Account Settings' (with sub-links for Contact Information, Change Password, Billing and Payments, Address Book, and Downloads Access Token), 'Billing History', 'Shared Access', and 'Shared with me'. The main content area is titled 'Change Password' and contains three input fields: 'Current Password \*', 'New Password \*', and 'Confirm New Password \*'. A 'Save' button is at the bottom. A note at the top right of the form states '\* All indicated fields are required'.

*Change Password*

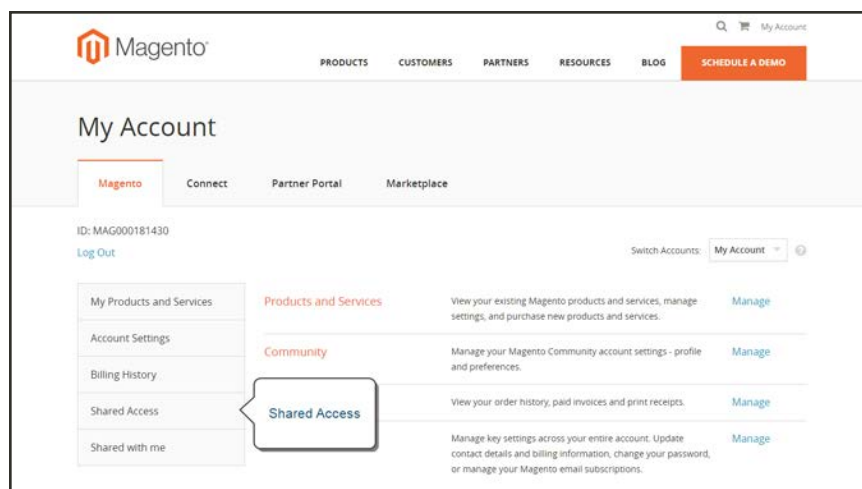
### Magento Account Password Requirements

FIELD	DESCRIPTION
Password	Your Magento password must be between 8-16 characters, and include at least one capital letter, one number, and one special character or lowercase letter.

## Sharing Your Account

Your Magento account contains information that can be useful to trusted employees and service providers who help to manage your site. As the primary account holder, you have authority to grant limited access to your account to other Magento account holders. When your account is shared, all sensitive information—such as your billing history or credit card information—remains protected. It is not shared at any time with other users.

All actions taken by users with shared access to your account are your sole responsibility. Magento Inc. is not responsible for any actions taken by users to whom you grant shared account access.



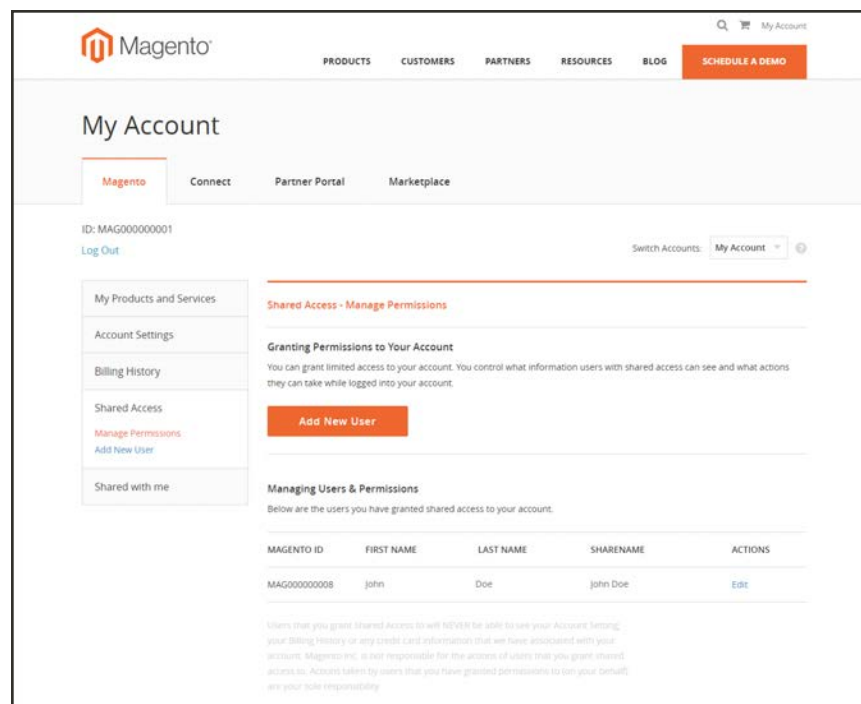
*Shared Access*

### To set up a shared account:

1. Before you begin, get the following information from the new user's Magento account:
  - Account ID
  - Email address
2. Log in to your **Magento account**.
3. In the panel on the left, under Shared Access, choose **Add New User**. Then, do the following:
  - Enter the **Acct ID** of the new user's Magento account.
  - Enter the **Email** address that is associated with the new user's Magento account.
4. In the Shared Information section, do the following:

- a. Enter a **Sharename** to identify your shared account. Because the Sharename becomes an option in the Switch Accounts list, it should be something that the other person will recognize as your account.
- b. To share your personal contact information, mark the checkbox of each item that you want to make available to the other person:
  - Your Email
  - Your Phone
5. In the Grant Account Permissions section, mark the checkbox of each Magento product and service that you want to share.
6. When complete, tap **Create Shared Access**.

You are notified when the new role is saved, and the new user record appears in the Manage Permissions section of the Shared Access page. Magento also sends an email invitation with instructions for accessing the shared account to the new user.

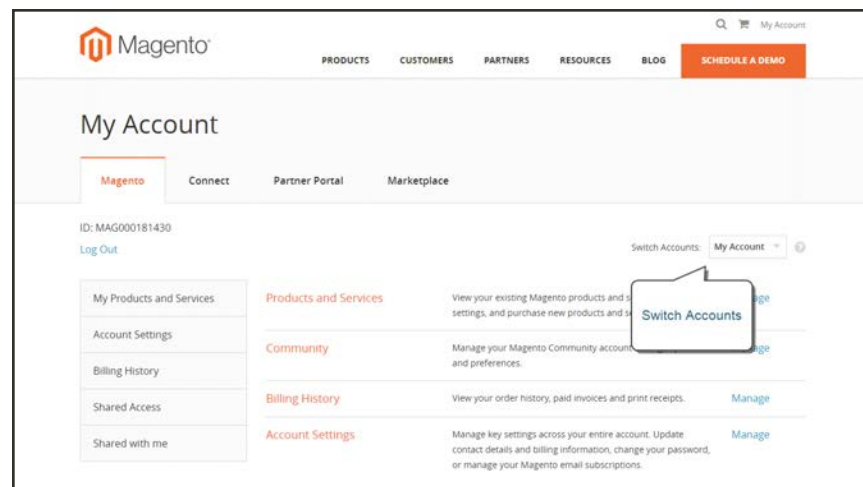


*Manage Permissions*

## To access a shared account:

1. When you receive the invitation to a shared account, log in to your own Magento account.  
Your account dashboard has a new Switch Accounts control in the upper-right corner, with options for “My Account” and the name of the shared account.
2. To gain access to the shared account, set **Switch Accounts** to the name of the shared account.

The shared account displays a welcome message and contact information. The left panel includes only the items that you have permission to use.



*Switch Accounts*

3. When you are ready to return to your own account, set **Switch Accounts** to “My Account.”



## CHAPTER 4:

### Quick Tour

In this quick tour, we'll take a look at each page that customers usually visit while shopping in your store. The path that customers follow that leads to a sale is sometimes called the “path to purchase.” Then, we'll take a look at the major landmarks along the journey, and how Magento Commerce can be used to attract and engage customers, increase the average order, and to build loyalty and advocacy.

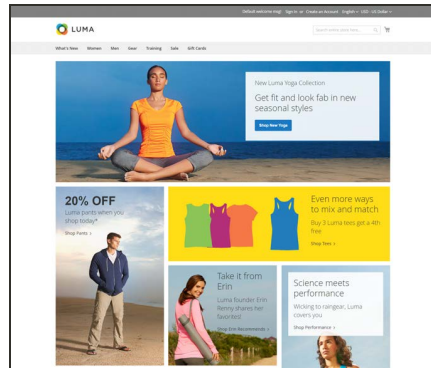


*Customer Journey*



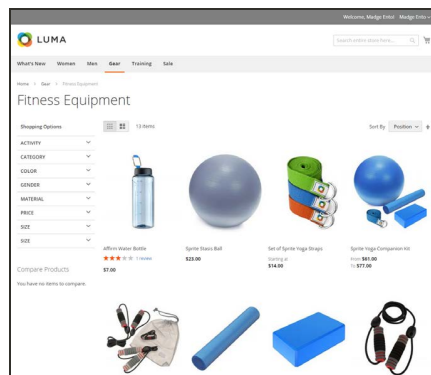
## Path to Purchase

The path customers follow that leads to a sale is sometimes called the “path to purchase.” In this quick tour, we’ll take a look at pages of strategic value that customers usually visit while shopping in your store. Then, we’ll consider different store features that can be leveraged at each stage of the customer journey.



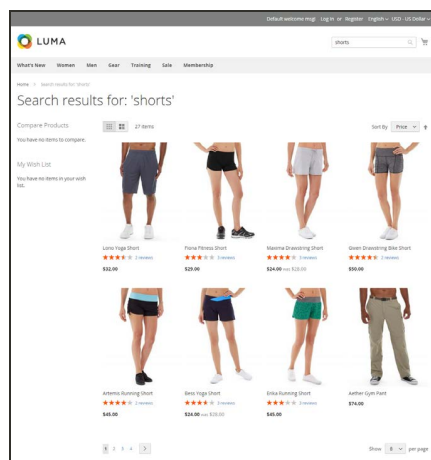
### Home Page

Your home page is like the front window display of your store. As the primary landing page, its design entices visitors to come inside for a closer look.



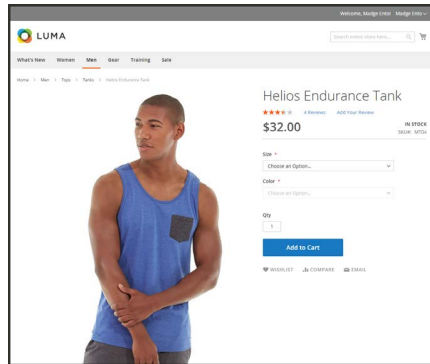
### Catalog Page

This page shows products from your catalog in either a list or grid format. The selection can be based on a category chosen from the main menu, a choice made in the layered navigation on the left, or the results of a search. Any item can be examined in more detail, or placed directly into the shopping cart.



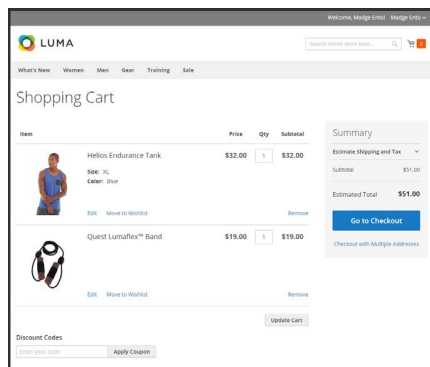
### Search Results

Did you know that people who use search are nearly twice as likely to make a purchase as those who rely on navigation alone? You might consider these shoppers to be “pre-qualified.”



## Product Page

The product page provides detailed information about a specific item in your catalog. Shoppers can read reviews, add the product to their wish lists, compare it to other products, share the link with friends, and most importantly, place the item into their shopping carts.



## Shopping Cart

The shopping cart lists each item by price and quantity selected, and calculates the subtotal. Shoppers can apply discount coupons, and generate an estimate of shipping and tax charges.

## Home Page

Did you know that most people spend only a few seconds on a page before they decide to stay or go somewhere else? That's not long to make an impression! Studies show that people also love photographs, especially of other people. Whatever design you choose, everything on your home page should move visitors along toward the next step in the sales process. The idea is to guide their attention in a cohesive flow from one point of interest to the next.

### Callouts

- Main Menu
- Search
- Your Account
- Feature a Brand
- Offer a Promotion
- Offer a Discount
- Hear from an Expert
- Appeal to a Lifestyle
- Shop by Fabric
- Popular Products
- Footer Links Block
- Footer Content
- Subscribe!



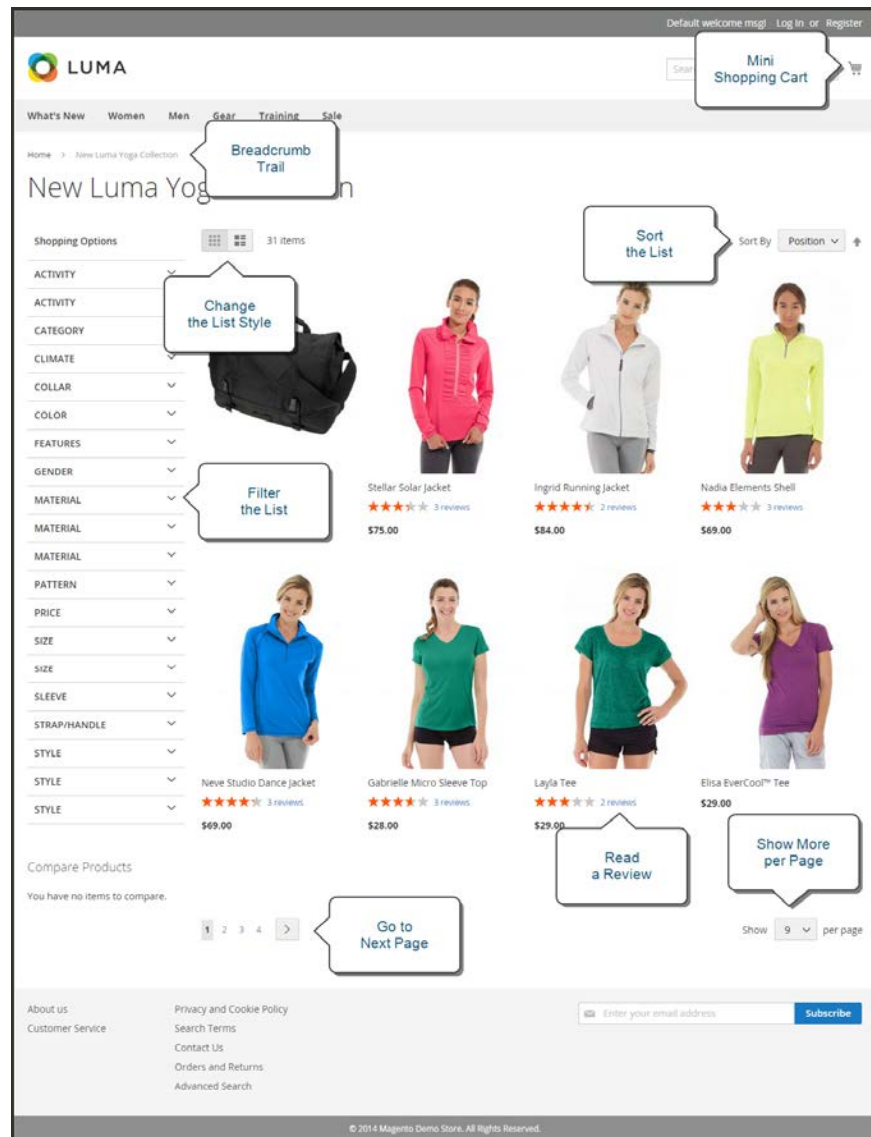
Home Page

## Catalog Page

Catalog page listings typically have small product images and brief descriptions, and can be formatted as a list or as a grid. You can add banners, videos, and keyword-rich descriptions, and also create special designs for a promotion or season. You might create a special category to feature a lifestyle or brand that is a curated collection of products from different categories. The initial product description usually gives shoppers just enough information to merit a closer look. People who know what they want can add the product to their carts and go. Customers who shop while logged in to their accounts enjoy a personalized shopping experience.

### Callouts

- Mini Shopping Cart
- Breadcrumb Trail
- Change the List Style
- Sort the List
- Filter the List
- Go to Next Page
- Read a Review
- Show More per Page



Catalog Page

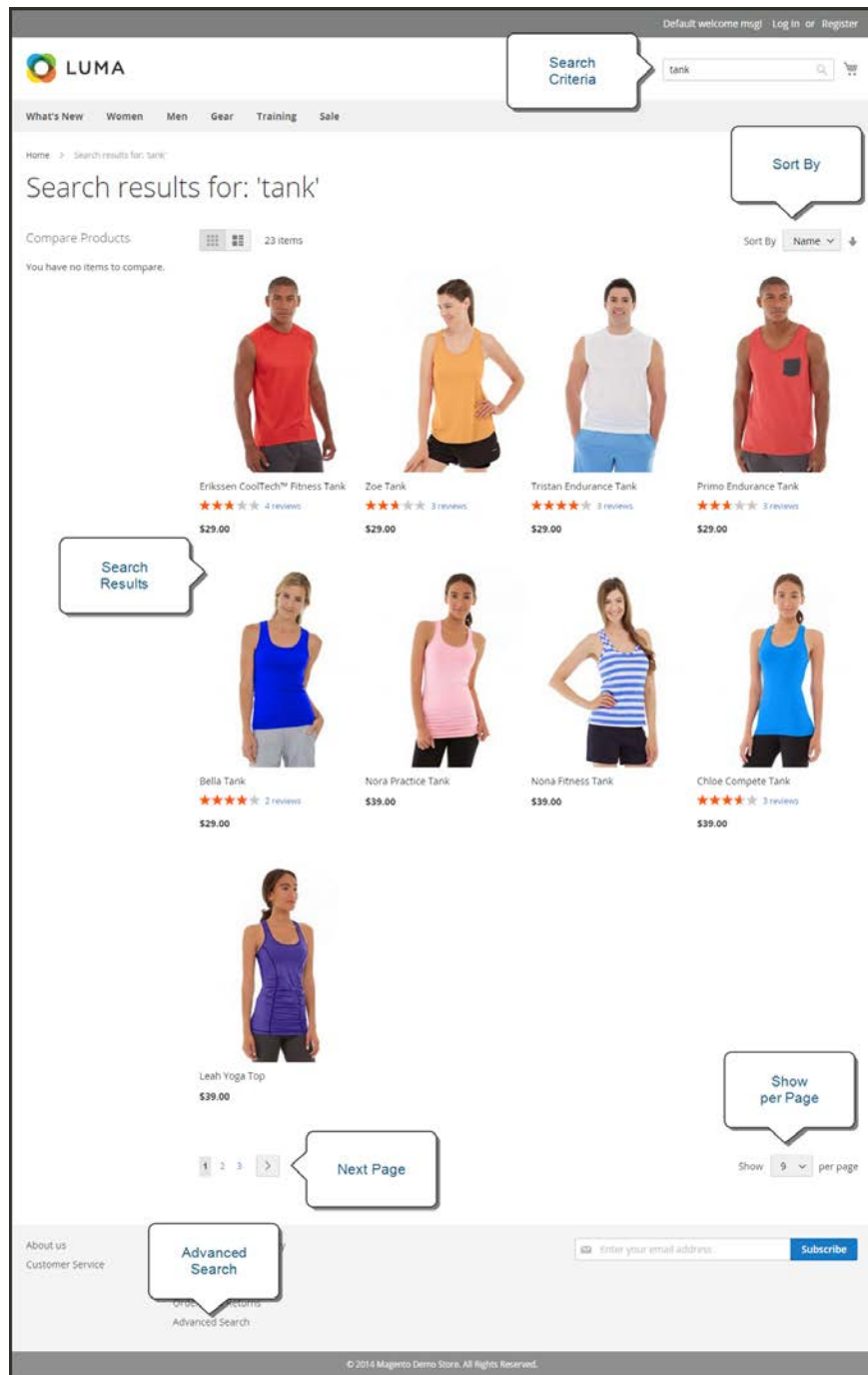
## Search Results

Did you know that people who use search are nearly twice as likely to make a purchase as those who rely on navigation alone? You might consider these shoppers to be “pre-qualified.”

Your store has a Search box in the upper-right corner, and a link to Advanced Search in the footer. All of the search terms that shoppers submit are saved, so you can see exactly what they’re looking for. You can offer suggestions, and enter synonyms and common misspellings. Then, display a specific page when a search term is entered.

### Callouts

- Search Criteria
- Sort By
- Search Results
- Show per Page
- Next Page
- Advanced Search

*Search Results Page*

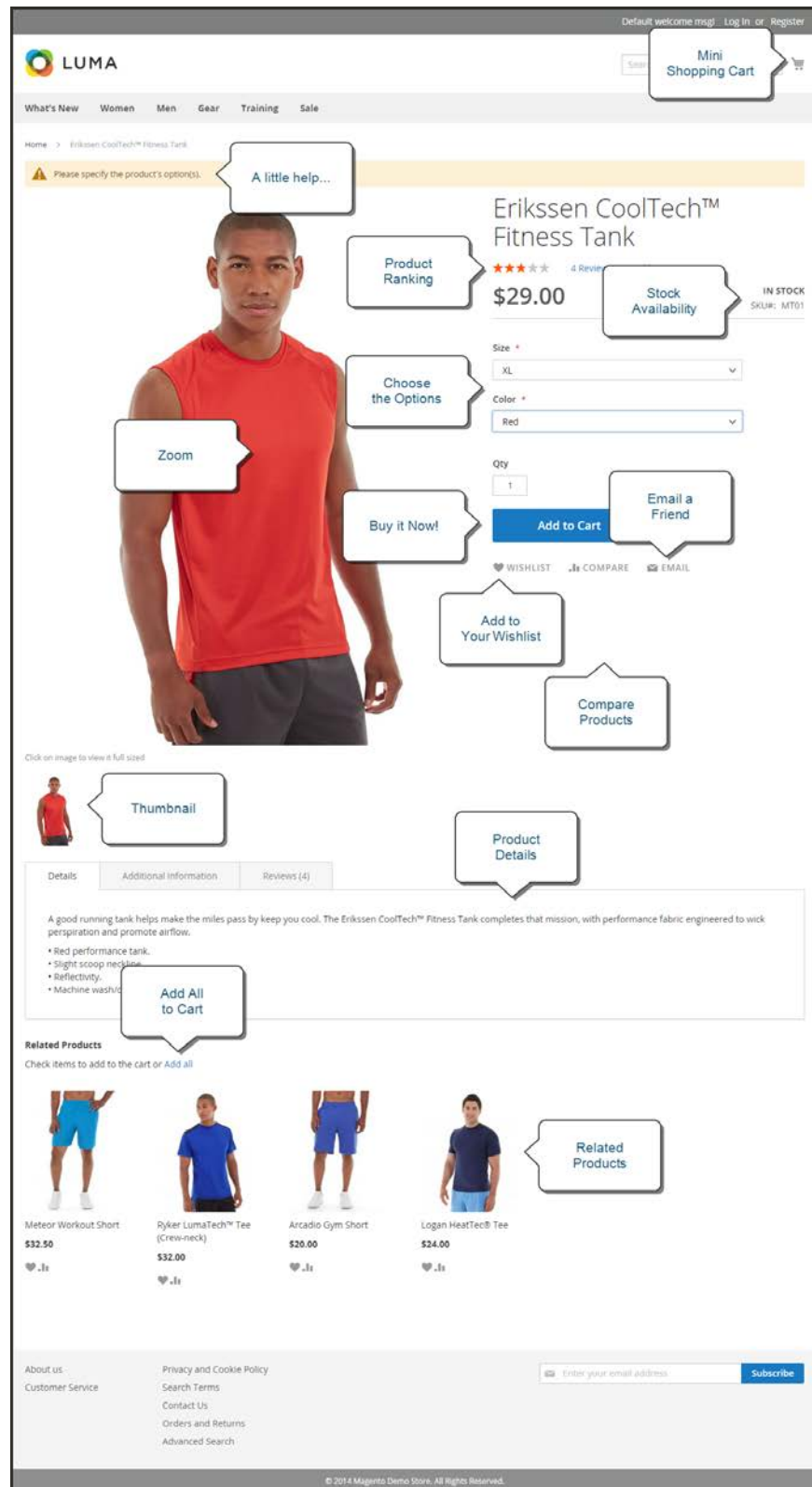


## Product Page

The product page has a lot going on! The first thing that catches your eye on the product page is the main image with a high-resolution zoom and thumbnail gallery. In addition to the price and availability, there's a tabbed section with more information and a list of related products.

### Callouts

- Mini Shopping Cart
- A little help...
- Product Rating
- Stock Availability
- Choose the Options
- Zoom
- Buy it Now!
- Email a Friend
- Add to Your Wish List
- Compare Products
- Thumbnail
- Product Details
- Add All to Cart
- Related Products



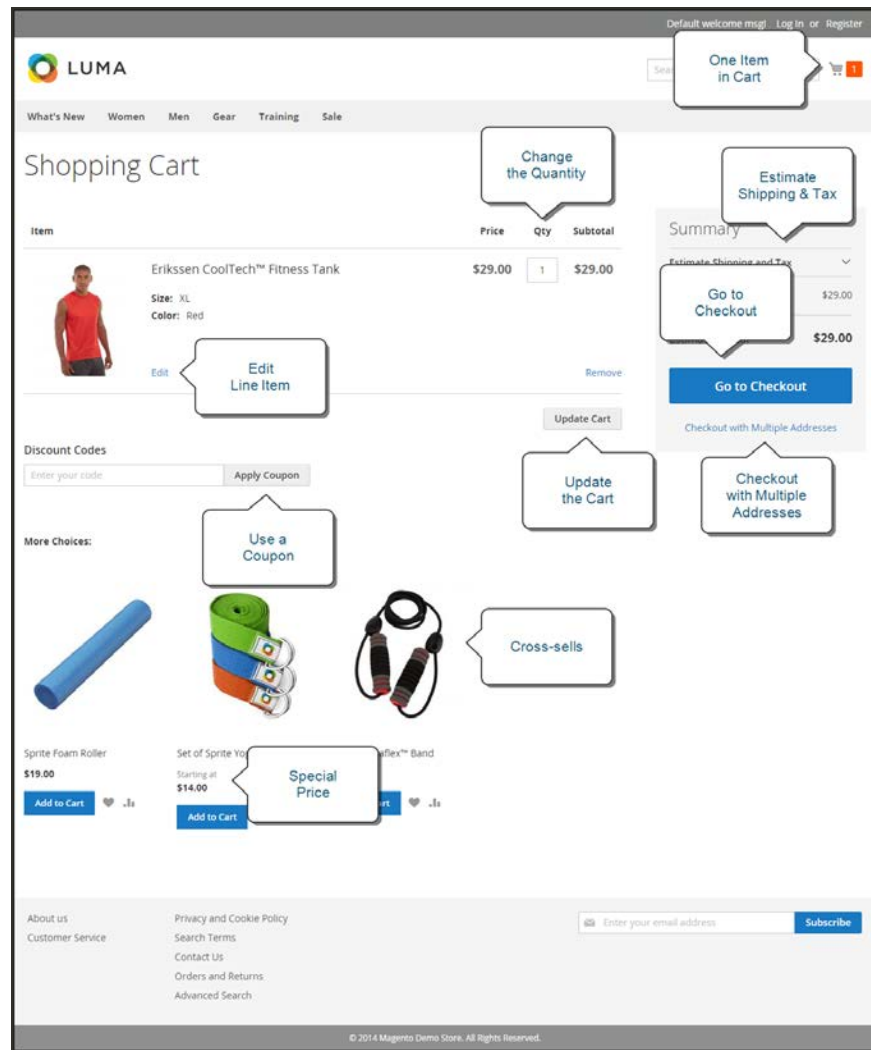
Product Page

## Shopping Cart

The cart is where order total can be determined, along with discount coupons and estimated shipping and tax, and is a great place to display your trust badges and seals. It's also an ideal opportunity to offer one last item. As a cross-sell, you can select certain items to be offered as an impulse purchase whenever a specific item appears in the cart.

### Callouts

- One Item in Cart
- Change the Quantity
- Estimate Shipping & Tax
- Go to Checkout
- Edit Line Item
- Update the Cart
- Checkout with Multiple Addresses
- Use a Coupon
- Cross-sells
- Special Price



Shopping Cart Page

## Customer Journey



### Attract New Customers

---

Magento Commerce includes SEO functionality out of the box. Improve your search ranking and attract the most visitors to your site.



### Engage Your Customers

---

Design your site with prepared templates, or create a custom design with features that invite people to interact with your store.



### Increase AOV

---

Increase average order value with promotions and content that encourage your customers to shop more.



### Moment of Purchase

---

Give your customers a faster and easier way to check out. Calculate shipping and taxes automatically, and integrate multiple payment methods on a single page.



### Customer Retention

---

Create and manage newsletters and promotions to keep your customers coming back for more.



## Loyalty & Advocacy

---

Encourage customers to write product reviews, create wish lists, and send email about products to their friends. Strengthen your relationship with your customers, who in return, speak positively of your business to friends and family.

## Attract New Customers

Magento Commerce is packed with features that make it easy to create a “search engine friendly” websites and increase the likelihood of bringing the right customers to your site.

### Search Engine Optimization

---

Magento offers powerful, native capabilities to streamline Search Engine Optimization (SEO) practices for content and site exposure that are integrated with the Admin, and tied directly into the user experience.

### Custom URLs

---

Custom URLs are short, clean, and easy to remember. You can also autogenerate search-friendly URLs to streamline your purchase path.

### Meta Data

---

Improve your search engine rankings by choosing specific criteria that helps search engines to find and index your products more easily. Meta data can be entered for product, category, and content pages.

### Sitemap

---

Link to a sitemap from the footer of your store to give customers an overview of the catalog structure, with links to all categories and products in the store. Easy integration with Google Sitemap.

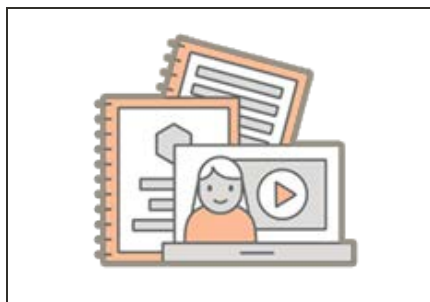
### Analytics

---

In addition to monitoring your site from the Admin dashboard, you can integrate third-party analytics tools such as Google Analytics and **New Relic Reporting** for detailed statistics on traffic and sales.

## Engage Your Customers

Magento Commerce makes it easy to create a customized, engaging site experience. Encourage your customers to spend more time exploring your site, and give them the tools to make it easy to find what they want faster.



### Content Management

---

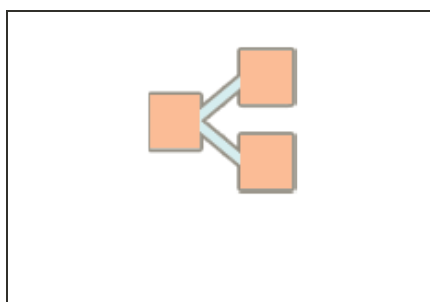
Magento's CMS makes it easy to store pages, or parts of pages, that you can use in your store. Even those without a technology background can create and manage site content.



### Design & Theme

---

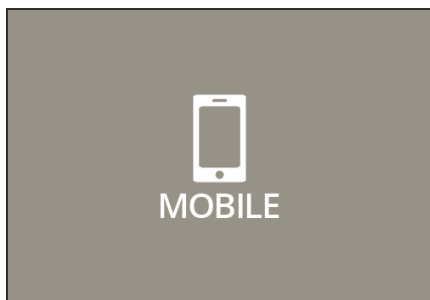
Control the visual elements of your store with a collection of templates and skin files. You can apply these visual elements to all pages in your store, giving your store a cohesive look and feel.



### Multiple Stores, Sites & Views

---

Control the look and feel of multiple sites, introduce new market and languages, and track analytics from a single Admin.



### Multiple Devices

---

Magento's powerful features make it easy to create storefronts optimized for iPhone, Android, and Mobile Opera browsers to help you engage consumers with mobile commerce now, and into the future.





## Shopping Tools

---

Your store includes a set of shopping tools that create opportunities for your customers to interact with your store, connect on social media, and share with friends.



## Sophisticated Search

---

Filter product by price, manufacturer, or any other criteria to reduce the time to purchase.

## Moment of Purchase

Now that you've given your customer an engaging shopping experience, make it easy for them to complete their purchases. Magento is designed to help you streamline your checkout process experience while boosting conversion rates.

### Order Processing

---

Magento supports a complete order processing workflow. It's easy to customize order statuses and track communications between sales reps and customers.

### Shipping Labels

---

Merchants have complete control over package characteristics such as weight and size. Shipping labels, rate, and bar code information originates directly from the carrier. Labels can be generated for single or multiple orders.

### Multiple Shipping Options

---

Magento supports a variety of shipping methods so you can give your customers a choice at checkout. Customers can see a real-time estimate of shipping charges right from the shopping cart.

### Multiple Payment Options

---

Magento Commerce supports the payment methods and currencies needed for global commerce. You can choose the ones you want to offer, and at checkout, your customers can choose the ones they prefer.

### PayPal Merchant Solutions

---

It's easy to integrate a PayPal Payments account to provide your customers faster, more secure checkout options.

### Shopping Assistance

---

Assisted shopping makes it easy for customer service reps to create orders for customers. Customer service reps have access to shopping cart contents, and can move items from a wish list to a shopping cart, apply coupon codes, and more.

### Security

---

Whether an order is fulfilled online or over the phone, Magento provides sophisticated security, including **CAPTCHA** and SSL encryption, with best-in-breed encryption and hashing algorithms to protect the security of the system.

## Increase Average Order Value

Magento Commerce provides a range of tools to help you tailor the shopping experience, and encourage your customers to put more items in their shopping carts and spend more money.



### Targeted Promotions

---

Magento's rule-based engine lets you segment customers dynamically and build segments based on specific characteristics such as customer address, order history, shopping cart content, and much more.



### Coupons

---

Create limited-time offers and coupons that customers can scan with their phone and apply to a purchase.



### Product Suggestions

---

Another way to increase AOV is to offer suggestions for related products and opportunities to up-sell and cross-sell at strategic points along the path to conversion.



### Email Reminders

---

Send automated reminder emails to customers who have added items to their carts or wish lists, but haven't made a purchase. A variety of triggers can launch automated emails, including total cart value, quantity, items in the cart, and more.

### User Permissions & Roles

---

Restrict access to data in the Admin on a "need to know" basis. Create multiple admin roles for read-only or and editing privileges. Track and review all activity at a granular level to specific stores and websites.

## Full-Page Caching

---

Enhance performance by caching primary pages. Caching pages improves server response times, reduces load, and increases sustainable traffic.

You can use tags to define which components to cache, so only relevant pages are cached as updates take place. It also has the ability to identify and differentiate visitors from shoppers.

## Sales Order Archive

---

Archiving orders frees resources and improves performance when sales reps are assisting customers with orders.

## Index Management

---

Automatic reindexing takes place whenever prices change, shopping carts are updated, or new categories created. Reindexing is a background process that does not interfere with store operations.

## Customer Retention

Magento makes it easy for you to get repeat business and build brand loyalty. Magento gives you total control and flexibility over creating and revising goodies like rewards programs, custom coupons and automated emails to keep your customers coming back again and again.



### RMA

---

Customers can submit requests for Return Merchandise Authorization from your store. You can create shipment orders in a carrier system, and print shipping labels with RMA numbers.



### Store Credit

---

Keep customers loyal and happy by issuing refunds as store credit or virtual gift cards to ensure that the money they spend stays in your store.



### Reward Points

---

Drive customer engagement with reward programs with award points based on a range of transactions and customer behaviors. Base redemption on a variety of factors, such as balance, customer history, and conversion rates.



### Target Shopping History

---

Encourage customers to make return purchases with targeted promotions based on their shopping history. With the Magento platform, you can easily build segments based on your customer base.



## Custom Coupons

---

Create coupons codes for social media, email, or print campaigns. You can incorporate coupon codes into any design you like.



## Newsletters

---

Stay in touch with current customers who've opted to receive newsletters. You can create as many newsletter templates as you want.



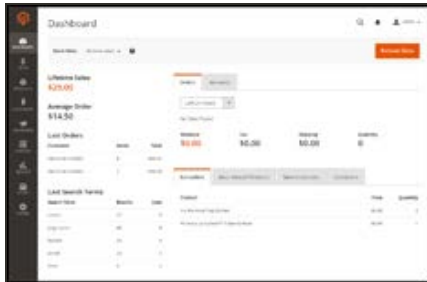
## RSS Feed

---

When RSS feeds are enabled, any additions to products, specials, categories, and coupons are automatically sent to the subscribers of each feed. A link to all RSS feeds that you publish is in the footer of your store.

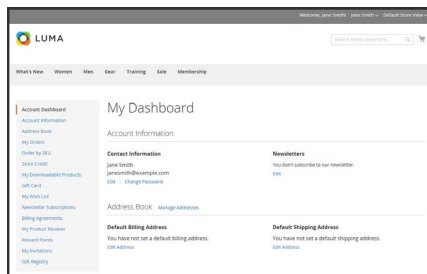
## Loyalty & Advocacy

Give customers a direct connection to your brand by allowing them to create customer accounts where they can see their purchase history, wishlist, and newsletter subscriptions. Use product ratings and reviews to give new customers objective product opinions and promote a sense of community. These features turn customer satisfaction into one of the most powerful and cost-efficient marketing tools at your disposal.



### Dashboard Snapshots

Knowing what's of interest on your site is crucial to maximize your marketing budget. Use this information to determine what you should cross- and up-sell to loyal customers, or which products to put on sale.



### Customer Accounts

Opening an account provides customers with a personalized shopping experience that they can share with their friends. Customers can save their shopping preferences, and manage their own store billing and shipping information.



### Advocacy Tools

Customers who share **wish lists** and send **gift cards** make a powerful endorsement of your brand. Wish lists become powerful advocacy tools when shared by email or RSS feed, and gift cards bring motivated new shoppers to your store.

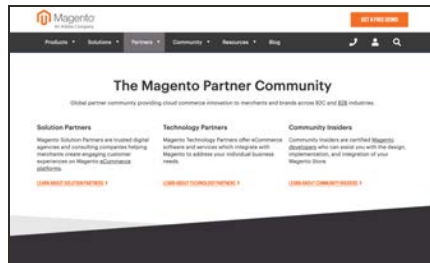


### Reviews & Ratings

Product reviews give your customers a way to engage with your brand while fostering a sense of community. You can curate your reviews with tools to help you edit and approve comments for inappropriate content before they go live.

# Success!

Opening your Magento store for business requires the following areas of consideration. While there are virtually any number of customizations you can make to the storefront and Admin, you can use each link in this is list as a place to start.



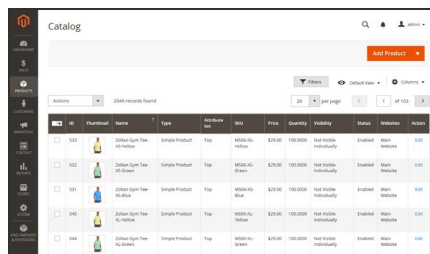
## Implementation

If you need help setting up your store, you can choose from our vast network of Magento Solutions Partners.



## Design

You can use a prepared theme and design your own home page, or work with an experienced Magento designer or **Magento Associate** to customize your site.



## Product Catalog

Configure products, create categories, import existing product catalogs, and leverage APIs or third-party data management solutions.



## Payment Methods

Magento supports a wide variety of payment methods, services, and gateways that you can offer for your customers' convenience.





## Shipping Methods

---

Magento shipping methods are easy to set up and give you the ability to connect with carriers who can ship your products all over the world.



## Taxes

---

Manage your taxes with our native tools, or add third-party extensions from Magento Marketplace.



## Thanks for your order!

---

Magento can help you to build relationships with your customers, and bring them back to your store, again and again.

# **B** **asic Configuration**

## Contents

This section of the guide introduces your store's Admin, and walks you through the basic configuration settings. You'll learn the concepts of store hierarchy and configuration scope, and establish best practices for industry standards and requirements.

### Store Admin

- Your Admin Account

- Admin Sidebar

- Admin Workspace

  - Dashboard

  - Message InBox

  - Global Search

  - Grid Controls

  - Actions Control

### Store Details

- Store Information

- Locale Options

- State Options

- Country Options

- Merchant Location

- Currency

- Store Email Addresses

- Contact Us

### Storefront Branding

- Uploading Your Logo

- Uploading a Favicon

- Welcome Message

- Store Demo Notice

- Copyright Notice

### Websites, Stores & Views

- Configuration Scope

- Single Store Mode

### Industry Compliance

- PCI Compliance

- Privacy Policy

- Cookie Law Compliance

  - Cookie Restriction Mode

  - Cookie Reference

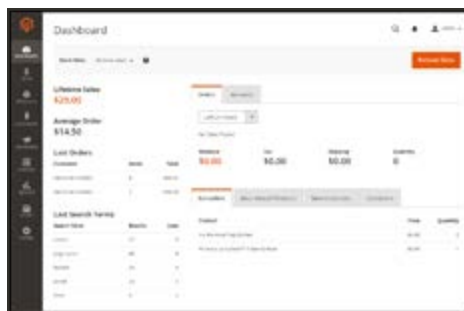
## CHAPTER 5:

# Store Admin

Your store Admin is the password-protected back office where you can set up products, promotions, manage orders, and perform other administrative tasks. All basic configuration tasks and store management operations are performed from the Admin.

- [Admin Sign In](#)
- [Your Admin Account](#)
- [Admin Sidebar](#)
- [Admin Workspace](#)

Your initial sign-in credentials were set up during the Magento installation. If you forget your password, a temporary password can be sent to the email address that is associated with the account. For increased security, you can configure your store to require a case-sensitive user name and password. For additional security, the Admin login can be configured to require a [CAPTCHA](#) or [Google reCAPTCHA](#). To learn more, see [Admin Security Settings](#).



*Admin Sidebar and Dashboard*

## Admin Sign In

The first thing you will learn is how to sign in and out of the Admin, and to reset your password. All of the instructions in the rest of this guide are written for a user with full administrative privileges, and begin with the assumption that you are logged in to the Admin. To learn more about Admin users and roles, see: [Permissions](#)

The [Advanced Admin](#) configuration determines how many times an admin user can try to log in before the account is locked. By default, six attempts are allowed. To unlock a user account, see: [Locked Users](#).



*Admin Sign In*

### To sign in to the Admin:

1. In the address bar of your browser, enter the URL that was specified during the installation, followed by the base URL of your store's Admin. The default Admin URLs look something like this:

`http://www.yourdomain.com/admin`

You can bookmark the page, or save a shortcut on your desktop for easy access.

2. Enter your Admin **User Name** and **Password**.
3. Tap **Login**.

## To reset your password:

1. If you forget your password, click the **Forgot Your Password?** link.



*Forgot Password*

2. Enter the **Email Address** that is associated with the Admin account.
3. Tap **Retrieve Password**.

If an account is associated with the email address, an email will be sent to reset your password.

Your Admin password must be seven or more characters long, and include both letters and numbers.

## To sign out of the Admin:

In the upper-right corner, tap the **Account** (  ) icon. Then on the menu, choose **Sign Out**.



*Sign Out*

The Sign-In page returns, with a message that you are logged out. It's always a good idea to sign out of the Admin whenever you leave your computer unattended.


Admin Password Requirements

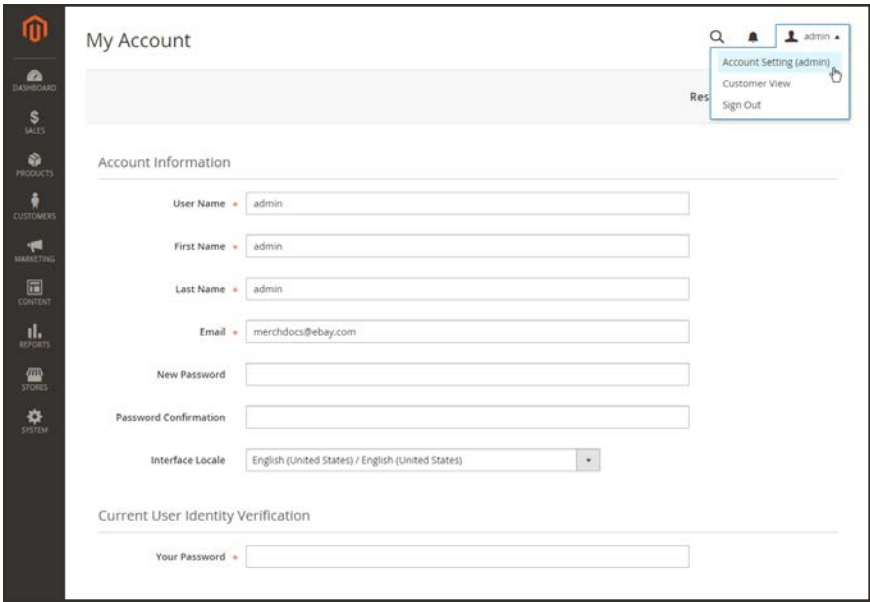
FIELD	DESCRIPTION
Password	An Admin password must be seven or more characters long, and include both letters and numbers. For additional password options, see: <a href="#">Configuring Admin Security</a> .

Your Admin Account

Your Admin account was initially set up during the installation, and might contain placeholder information. You can personalize your user name and password, and update your first and last name, and email address at any time. To learn more about Admin accounts and roles, see: [Permissions](#).

To edit your account information:

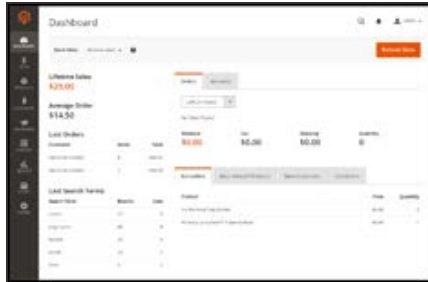
- 1. In the upper-right corner, tap the **Account** (  ) icon. Then, choose **Account Setting**.
- 2. Make any changes necessary changes to your account information. If you change your login credentials, make sure to write them down.
- 3. When complete, tap **Save Account**.



Account Information

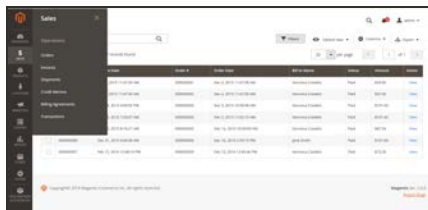
## Admin Sidebar

The sidebar on the left is the main menu for your store's Admin, and is designed for both desktop and mobile devices. The flyout menu provides access to all the tools you need to manage your store on a daily basis.



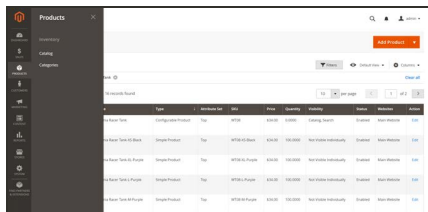
# Dashboard

The Dashboard provides a quick overview of the sales and customer activity in your store, and is usually the first page that appears when you log in to the Admin.



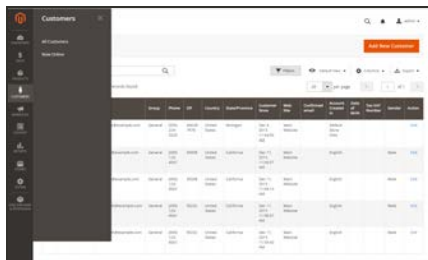
## Sales

The Sales menu is where you can find everything related to the operations of processing orders, invoices, shipments, credit memos, and transactions.



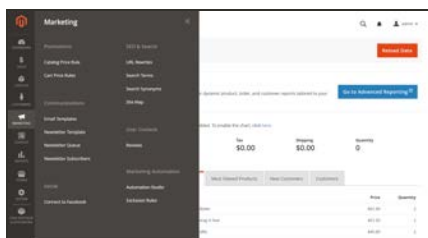
## Products

The Products menu controls everything related to your product catalog and inventory.



## Customers

The Customers menu is where you can manage customer accounts, and see which customers are online at the moment.



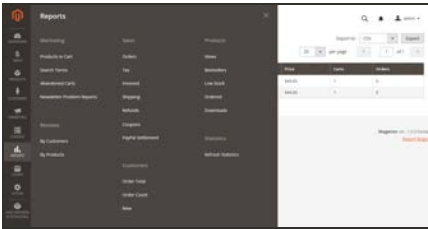
## Marketing

The Marketing menu is where you set up catalog and shopping cart price rules and coupons. Price rules trigger actions when a set of specific conditions is met.



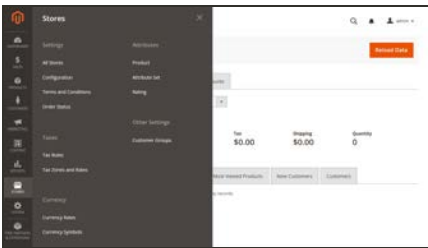
# Content

The Content menu is where you manage the content elements and design of your store. You will learn how to create pages, blocks, and frontend apps, and manage the presentation of your store.



# Reports

The Reports menu provides a broad selection of reports that give you insight into every aspect of your store, including sales, shopping cart, products, customers, tags, reviews, and search terms.



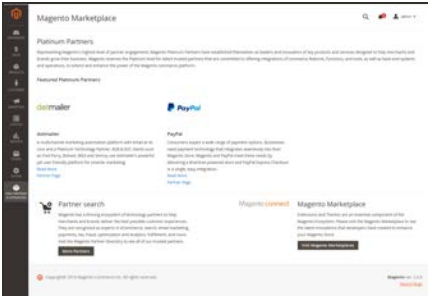
# Stores

The Store menu includes tools to configure and maintain every aspect of your store.



# System

The System menu includes tools install extensions and manage Web Services for integration with other applications.

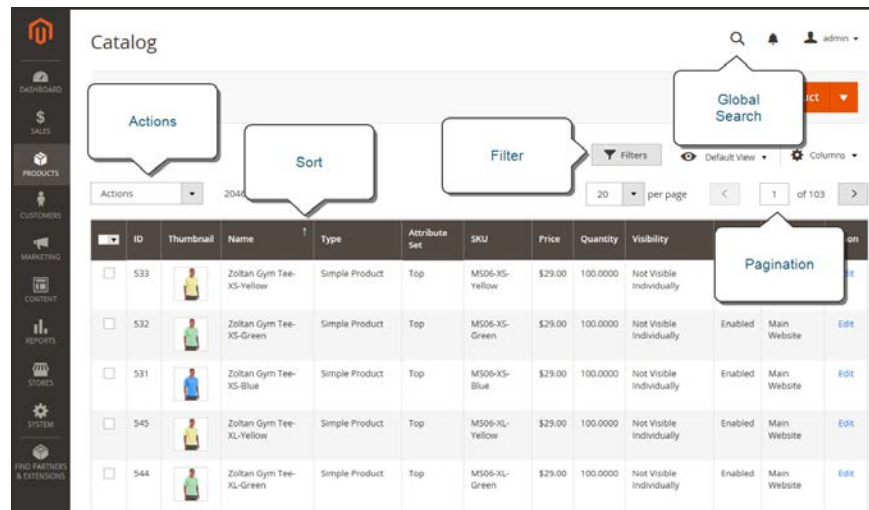


# Find Partners & Extensions

This is where you can find a marketplace Magento Partners and solutions for your store.

## Admin Workspace

The Admin workspace provides access to all the tools, data, and content that you need to run your store. The main pages have a grid that lists the data for the section, with a set of tools to search, sort, filter, select, and apply actions.



*Admin Workspace*

### Workspace Controls

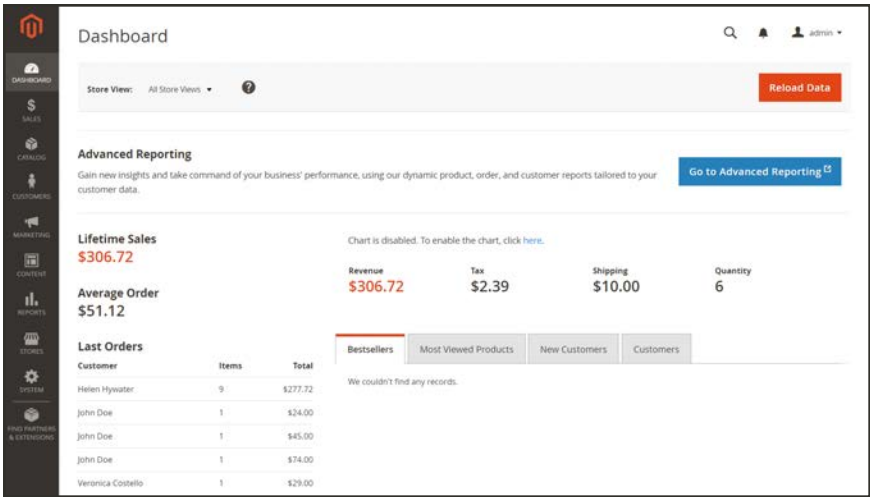
CONTROL	DESCRIPTION
Search	The Global Search box can be used to find any value in the database, including product, customer, and order records.
Sort	The header of each column can be used to sort the list in ascending or descending order.
Filter	The filters in the header of each column can be used to limit the list to specific values. Some filters have additional options that can be selected from a list box, and for others, you can simply type the value you want to find.
Paginate	The pagination controls are used to view the additional pages of results.
Actions	The Actions control applies an operation to all selected records. To select a record, mark the checkbox in the first column, or use the Mass Actions control to select multiple records.
Mass Actions	The Mass Actions control is used to select multiple records to be the target of action. Options: Select All / Unselect All, Select Visible / Unselect Visible

# Dashboard

The dashboard is usually the first page that appears when you log in to the Admin, and gives an overview of sales and customer activity. The blocks on the left provide a snapshot of lifetime sales, average order amount, the last five orders, and search terms. The graph shows the orders and amounts for the selected date range. You can use the tabs above the graph to toggle between the two views. The tabs at the bottom provide quick reports about your best-selling and most viewed products, new customers and those who have purchased the most.

The dashboard is the default **startup page** for the Admin, although you can change the configuration to display a different page when you log in. You can also set the starting dates used in dashboard reports, and disable the display of the charts section.

You can produce Dashboard snapshot reports for each store view. The tabs at the bottom of the page summarize your best-selling and most viewed products, new customers, and those who have purchased the most during the time period specified.



Dashboard

## To configure the chart:

1. On the Admin sidebar, tap **Stores**. Under **Settings**, choose **Configuration**. Then, do any of the following:

### Enable Charts

1. In the panel on the left, under **Advanced**, choose **Admin**.
2. In the Dashboard section, set **Enable Charts** to “Yes.”

A screenshot of the 'Dashboard' configuration panel. It features a title bar 'Dashboard' with a close icon. Below, the 'Enable Charts' setting is shown with a dropdown menu currently set to 'No'. A checkbox labeled 'Use system value' is checked. The text '[global]' is visible below the dropdown.

*Dashboard*

### Set the Beginning Dates

1. In the panel on the left under General, choose **Reports**.
2. In the Dashboard section do the following:
  - a. Set **Year-To-Date Starts** to the **Month** and **Day**.
  - b. Set **Current Month Starts** to the **Day**.

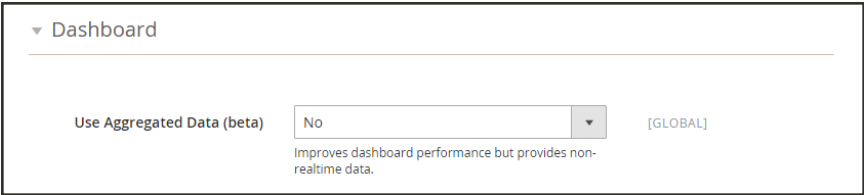
A screenshot of the 'Dashboard' configuration panel for setting beginning dates. It has a title bar 'Dashboard' with a close icon. The 'Year-To-Date Starts' section has two dropdown menus, both set to '01', with '[GLOBAL]' to the right. The 'Current Month Starts' section has a dropdown menu set to '01' with '[GLOBAL]' to the right. Below this dropdown is the text 'Select day of the month.'

*Dashboard*

### Choose the Data Source

If you have a lot of data to process, the performance of the Dashboard can be improved by turning off the display of real time data.

1. In the panel on the left, tap to expand **Sales**. Then, choose **Sales**.
2. Tap to expand the **Dashboard** section, and do the following:
  - For real-time data, set **Use Aggregated Data (beta)** to “Yes.”
  - For historical data, set **Use Aggregated Data (beta)** to “No.”



*Dashboard*

### Change the Startup Page

1. In the panel on the left, tap to expand **Advanced**. Then, choose **Admin**.
2. Tap to expand the **Startup Page** section.
3. Choose the **Startup Page** that you want to appear when you log in to the Admin. The list includes every page in the Admin menu structure.



*Startup Page*

2. When complete, tap **Save Config**.

## Dashboard Reports

REPORT	DESCRIPTION
Sales	The Dashboard reports on Lifetime Sales, Revenue, Tax, Shipping, and Quantity for the time period specified.
Orders	The Orders tab at the top displays a chart of all orders during the specified time period. Below the chart is the total revenue, tax, shipping, and quantity ordered. The lifetime sales amount and the last five orders are on the left.
Amounts	The Amounts tab at the top displays a chart of all order amounts during the specified time period. The average order amount and the last five orders are on the left.
Search Terms	The last five search terms, and top five search terms appear on the left.
Products	The Bestsellers tab shows the price and quantity ordered of your best-selling products. The products that have been viewed the most during the specified time period are listed on the Most Viewed Products tab.
Customers	The Customers tab at the bottom lists the customers who have ordered the most during the specified range of time. The New Customers tab lists all new customers who have registered for an account during the time period. On the left, the Last Orders section lists the most recent orders by customer.

## Message Inbox

Your store receives messages from Magento on a regular basis. The messages might refer to system updates, patches, new releases, scheduled maintenance or upcoming events, and are rated by importance. The bell icon in the header indicates the number of unread messages in your inbox.

The screenshot shows the 'Orders' page in the Magento Admin interface. A pop-up message box is visible in the top right corner, containing the following text:

Marketers and merchandisers: Supercharge your sales and productivity with new Content Staging and Preview capabilities in Magento Enterprise Edition 2.1.

Bring fresh and exciting shopping experiences to market faster than ever before with new tools to easily stage, preview, and schedule content and promotions.

Jun 23, 2016, 9:43:45 AM

New Enterprise Edition 2.0 Patch (MDN-532) Enables Upgrades to Magento 2.1 - June 23, 2016

A new patch, MDN-532, enables merchants using Magento Enterprise Edition 2.0.x to upgrade to Magento Enterprise Edition 2.1 Release Candidates or GA.

Jun 23, 2016, 3:29:17 PM

See All (2 unread)

The background shows a table of orders with columns: ID, Purchase Point, Purchase Date, Bill-to Name, Ship-to Name, Grand Total, and Action. The table contains three records.

ID	Purchase Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total	Action
000000003	Main Website Main Website Store English	Jun 11, 2016, 7:06:00 AM	Veronica Costello	Veronica Costello	\$37.00	View
000000002	Main Website Main Website Store English	Jun 10, 2016, 17:06:00 PM	Veronica Costello	Veronica Costello	\$37.00	Complete View
000000001	Main Website Main Website Store English	Jun 10, 2016, 17:06:00 PM	Veronica Costello	Veronica Costello	\$34.00	Processing View

### Incoming Messages

Any message of critical importance appears in a pop-up window when you log into your store. The notice continues to appear after each login until the message is either marked as read, or removed.

The screenshot shows the 'Dashboard' page in the Magento Admin interface. A yellow pop-up message box is visible in the top center, containing the following text:

**Incoming Message**

critical

Important: Install Magento Community Edition 2.0.1 for Security & Functional Updates - 1/20/2016

[Read Details](#)

Close

### Message of Critical Importance

The Notifications grid lists all messages ranked by severity, with the most recent at the top. The Action commands can be used to mark individual messages as read, view more detailed information, or to remove the message from the inbox.

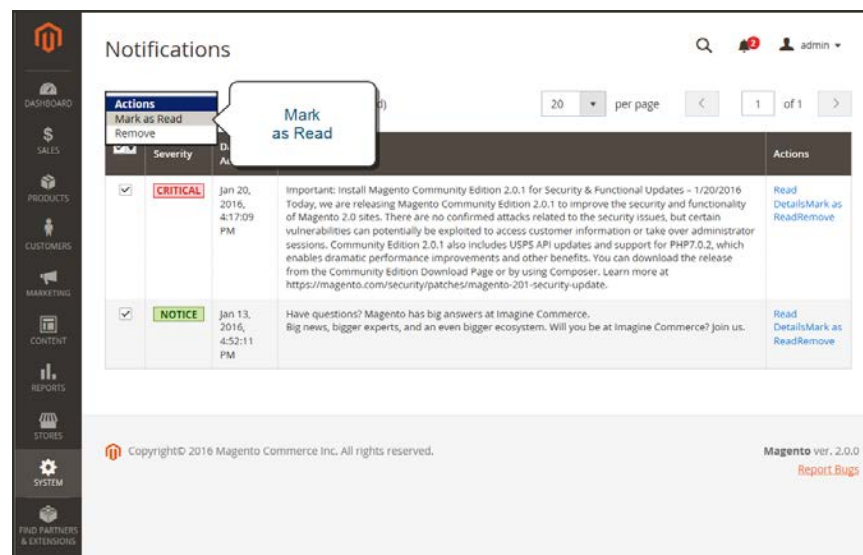
The configuration determines how often the inbox is updated, and how the messages are delivered. If your store Admin has a secure URL, notifications must be delivered over HTTPS.

## To view incoming messages:

1. Tap the **Notification** icon in the header, and read the summary. Then, do one of the following:
  - If necessary, tap the message to display the full text.
  - To delete the message, tap the delete icon to the right of the message.
  - To display the Notifications grid, click **See All**.
2. For a message of critical importance, do one of the following:
  - Click **Read Details**.
  - To remove the popup, but keep the message active, tap **Close**.

## To view all notifications:

1. Do one of the following:
  - Tap the **Notification** icon in the header. Then in the footer of the summary, click **See All**.
  - On the Admin sidebar, tap **System**. Then under **Other Settings**, choose **Notifications**.
2. In the **Action** column, do any of the following:
  - For more information, tap **Read Details**. The linked page opens in a new window.
  - To keep the message in your inbox, tap **Mark As Read**.
  - To delete the message, tap **Remove**.



*All Notifications*



3. To apply an action to multiple messages, do one of the following:
  - Mark the checkbox in the first column to select each message to be managed.
  - To select multiple messages, set the **Mass Actions** control as needed.
4. Set the **Actions** control to one of the following:
  - Mark as Read
  - Remove
5. Tap **Submit** to complete the process.

### To configure notifications:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. Scroll down, and in the panel on the left under **Advanced**, choose **System**.
3. Expand ☑ the **Notifications** section, and do the following:
  - a. If your store Admin runs over a **secure URL**, set **Use HTTPS to Get Feed** to “Yes.”
  - b. Set **Update Frequency** to determine how often your inbox is updated. The interval can be from one to twenty-four hours.



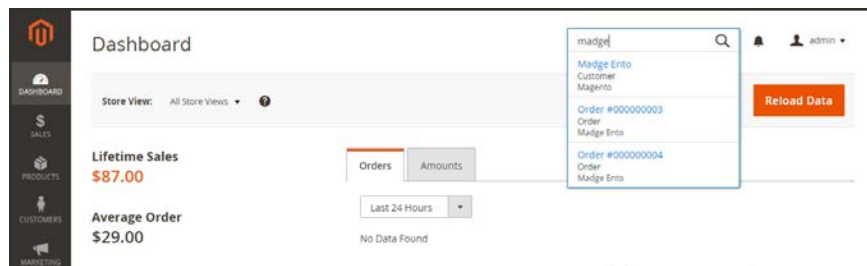
The screenshot shows the 'Notifications' configuration panel. It contains two settings: 'Use HTTPS to Get Feed' set to 'No' and 'Update Frequency' set to '1 HOUR'. Both settings have a 'Use system value' checkbox which is checked. At the bottom, it shows 'Last Update' as 'Jul 11, 2016 8:50:42 AM'.

### Notifications

4. When complete, tap **Save Config**.

## Global Search

The spy glass in the header of the Admin can be used to find any record in the database. The results can include customers, products, orders, or any related attribute. For example, if you enter a customer name, the results might include the customer record as well as any orders that are associated with the name.



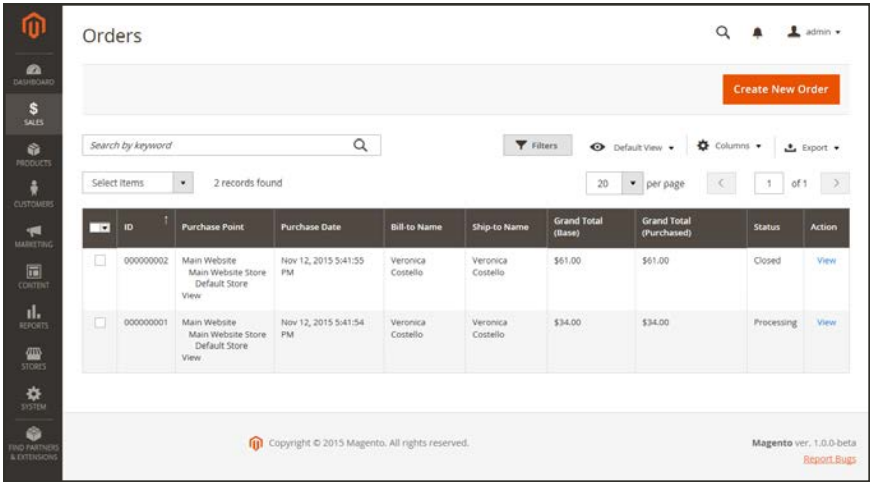
*Search*

### To find a match:

1. In the header, tap the **spy glass** (🔍) to open the search box. Then, do one of the following:
  - To find a close match, enter the first few letters of what you want to find.
  - To find an exact match, enter the word, or multiple words that you want to find.
2. In the search results, click any item to open the record.

# Grid Controls

Admin pages that manage data display a collection of records in a grid. The controls at the top of each column can be used to sort the data. The current sort order is indicated by an ascending or descending arrow in the column header. You can specify which columns appear in the grid, and drag them into different positions. You can also save different column arrangements as views that can be used later. The Action column lists operations that can be applied to an individual record. The data from the current view can be exported to a CSV or XML file.



Orders Grid

## To sort the list:

- 1. Tap any column header. The arrow indicates the current order as either ascending or descending.
- 2. Use the pagination controls to view additional pages in the collection.

## To paginate the list:

- 1. Set the **Pagination** control to the number of records that you want to view per page.
- 2. Tap **Next** and **Previous** to page through the list, or enter a specific **Page Number**.



Next and Previous

## To filter the list:

1. Tap **Filters**.
2. Complete as many filters as necessary to describe the record you want to find.
3. Tap **Apply Filters**.

*Filter Controls*

## Grid Layout

The selection of columns and their order in the grid can be changed according to your preference, and saved as a “view.” By default, only nine of twenty available columns are visible in the grid.

*Order Grid Columns*

### To change the selection of columns:

1. In the upper-right corner, tap the **Columns** (⚙️) control. Then, do the following:
  - Mark the checkbox of any column you want to add to the grid.
  - Clear the checkbox of any column you want to remove from the grid.
2. Make sure to scroll down to see all available columns.

### To move a column:

1. Tap the header of the column, and hold.
2. Drag the column to the new position, and release.

### To save a grid view:

1. Tap the **View** (👁️) control. Then, tap **Save Current View**.
2. Enter a **name** for the view. Then, click the **arrow** (➡️) to save all changes.

The name of the view now appears as the current view.

### To change the grid view:

Tap the **View** (👁️) control. Then, do one of the following:

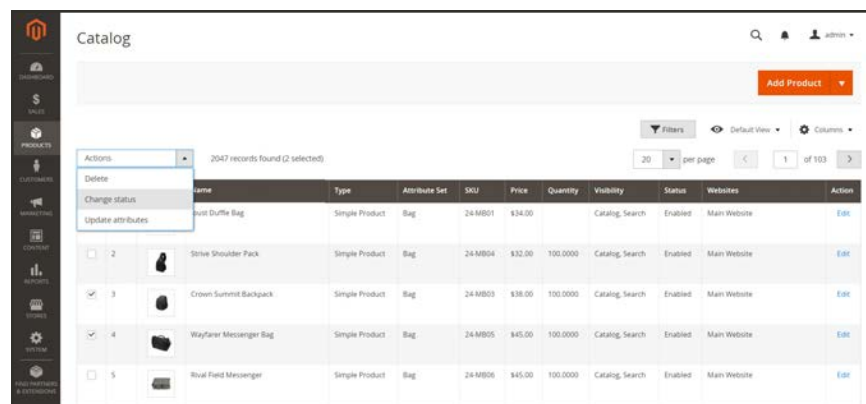
- To use a different view, tap the name of the view.
- To change the name of a view, tap the **Edit** (✏️) icon. Then, update the name.

## Actions Control

When working with a collection of records in the grid, you can use the Actions control to apply an operation to one or more records. The Actions control lists each operation that is available for the specific type of data. For example, for product records, you can use the Actions control to update the attributes of selected products, change the status from “Disabled” to “Enabled,” or to delete records from the database. .

You can make as many changes as necessary, and then update the records in a single step. It’s much more efficient than changing the settings individually for each product.

The selection of available actions varies by list, and additional options might appear, depending on the action selected. For example, when changing the status of a group of records, a Status box appears next to the Actions control with additional options.



*Applying an Action to Selected Records*

### Step 1: Select Records

The checkbox in the first column of the list identifies each record that is a target for the action. The **filter controls** can be used to narrow the list to the records you want to target for the action.

1. Mark the checkbox of each record that is a target for the action. Or, use one of the following Actions to select a group of records:
  - Select All / Unselect All
  - Select All on This Page/ Deselect All on This Page
2. If needed, set the filters at the top of each column to show only the records that you want to include.

## Step 2: Apply an Action to Selected Records

1. Set the **Actions** control to the operation that you want to apply.

### Example: Update Attributes

1. In the list, mark the checkbox of each record to be updated.
2. Set the **Actions** control to “Update Attributes,” and tap **Submit**.

The Update Attributes page lists all the available attributes, organized by group in the panel on the left.

*Update Attributes*

3. Mark the **Change** checkbox next to each attribute, and make the necessary changes.
4. Tap **Save** to update the attributes for the group of selected records.
2. When complete, tap **Submit**.

**Actions**

ACTION	DESCRIPTION
Select All	Marks the checkbox of all records in the list.
Unselect All	Clears the checkbox of all records in the list.
Select All on This Page	Marks the checkbox of records on the current page.
Deselect All on This Page	Clears the checkbox of records on the current page.

**Actions by Grid**

MENU	LIST	ACTIONS
<b>SALES</b>		
	Orders	Cancel Hold Unhold Print Invoices Print Packing Slips Print Credit Memos Print All Print Shipping Labels Move to Archive
	Invoices	PDF Invoices
	Shipments	PDF Shipments Print Shipping Labels
	Credit Memos	PDF Credit Memos
<b>PRODUCTS</b>		
	Catalog	Delete Change Status Update Attributes
<b>CUSTOMERS</b>		
	All Customers	Delete Subscribe to Newsletter Unsubscribe from Newsletter



**Actions by Grid (cont.)**

MENU	LIST	ACTIONS
		Assign a Customer Group Edit
<b>MARKETING</b>		
<b>Communications</b>		
	Newsletter Subscribers	Unsubscribe Delete
<b>SEO &amp; Search</b>		
	Search Synonyms	Delete
	Search Terms	Delete
<b>User Content</b>		
	Reviews	Delete Update Status
<b>CONTENT</b>		
<b>Elements</b>		
	Pages	Delete Disable Enable Edit
	Blocks	Delete Edit
<b>REPORTS</b>		
	Refresh Statistics	Refresh Lifetime Statistics Refresh Statistics for the Last Day
<b>STORES</b>		
<b>Settings</b>		

**Actions by Grid (cont.)**

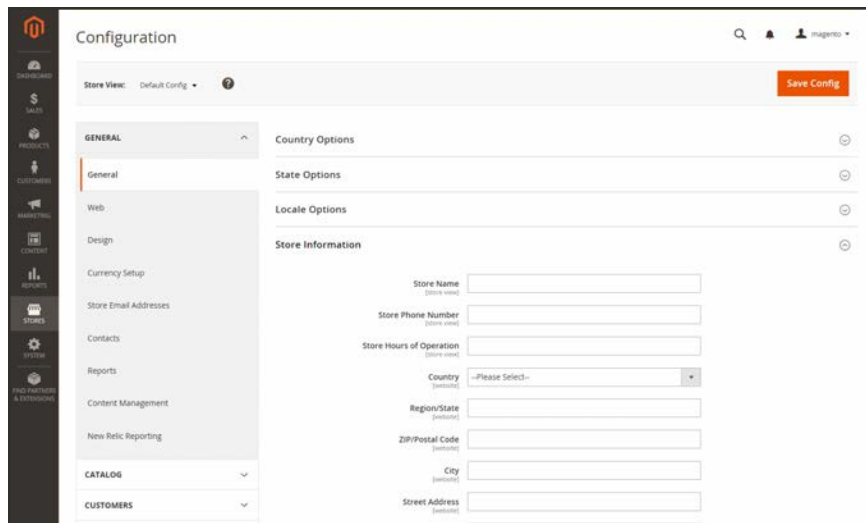
MENU	LIST	ACTIONS
	Order Status	Unassign
<b>SYSTEM</b>		
<b>Tools</b>		
	Cache Management	Enable Disable Refresh
	Backups	Delete
	Index Management	Update on Save Update by Schedule
<b>Other Settings</b>		
	Notifications	Mark as Read Remove



## CHAPTER 6:

# Store Details

The basic information for your store includes the store name and address, telephone number and email address, that appear on email messages, invoices, and other communications sent to your customers.

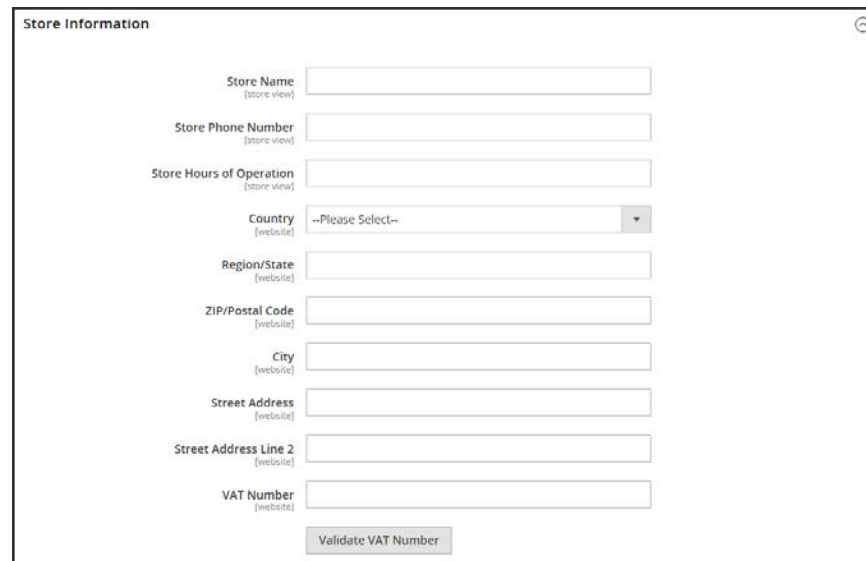


The screenshot shows the Magento Configuration interface. On the left is a sidebar with navigation links: GENERAL, CATALOG, and CUSTOMERS. The GENERAL section is expanded, showing sub-links: General, Web, Design, Currency Setup, Store Email Addresses, Contacts, Reports, Content Management, and New Relic Reporting. The main content area is titled 'Configuration' and shows the 'Store View: Default Config' dropdown. A 'Save Config' button is in the top right. The 'General' tab is active, displaying sections for 'Country Options', 'State Options', 'Locale Options', and 'Store Information'. The 'Store Information' section contains input fields for Store Name, Store Phone Number, Store Hours of Operation, Country (a dropdown menu), Region/State, ZIP/Postal Code, City, and Street Address.

*General Configuration*

## Store Information

The Store Information section provides the basic information that appears on sales documents and in other communications.




The screenshot shows a form titled "Store Information" with a close button in the top right corner. The form contains the following fields:

- Store Name** [store view]
- Store Phone Number** [store view]
- Store Hours of Operation** [store view]
- Country** [website] (Dropdown menu with "--Please Select--")
- Region/State** [website]
- ZIP/Postal Code** [website]
- City** [website]
- Street Address** [website]
- Street Address Line 2** [website]
- VAT Number** [website]

At the bottom of the form is a button labeled "Validate VAT Number".

### *Store Information*

### To enter your store information:

1. On the Admin sidebar, tap **Stores**. Then under Settings, choose **Configuration**.
2. In the panel on the left under **General**, choose **General**.
3. Expand  the **Store Information** section, and do the following:
  - a. Enter the **Store Name** that you want to use in all communications.
  - b. Enter the **Store Phone Number**, formatted as you want it to appear.
  - c. In the **Store Hours of Operation** field, enter the hours your store is open for business. For example: Mon - Fri, 9-5, Sat 9-noon PST.
  - d. Select the **Country** where your business is located.
  - e. Select the **Region/State** with the country.
  - f. Enter the **Store Address**. If the address is long, continue the address on **Store Address Line 2**.
  - g. If applicable, enter the **VAT Number** of your store. To verify the number, click the **Validate VAT Number** button.
4. When complete, tap **Save Config**.

## Locale Options

The locale determines the language, country, tax rate, and other settings that are used throughout the store. The Locale Options determine the time zone and language used for each store, and identify the days of the work week in your area.

*Locale Options*

### To set the store locale:

1. On the Admin sidebar, tap **Stores**. Then under Settings, choose **Configuration**.
2. In the panel on the left under **General**, choose **General**.
3. Expand ☑ the **Locale Options** section.
4. Select your **Timezone** from the list. Then, do the following:
  - a. Set **Locale** to the store language.
  - b. Set **Weight Unit** to the unit of measurement that is typically used for shipments from your locale.
  - c. Set **First Day of the Week** to the day that is considered to be the first day of the week in your area.
  - d. In the **Weekend Days** list, select the days which fall on a weekend in your area. (To select multiple options, hold down the Ctrl (PC) or Command (Mac) key.)
5. When complete, tap **Save Config**.

## State Options

In many countries, the state, province, or region is a required part of a postal address. The information is used for shipping and billing information, to calculate tax rates, and so on. For countries where the state is not required, the field can be omitted entirely from the address, or included as an optional field.

Because standard address formats vary from one country to another, you can also edit the template that is used to format the address for invoices, packing slips, and shipping labels.

The screenshot shows a configuration window titled "State Options". Inside, there is a section labeled "State is Required for" with a list of countries: Afghanistan, Aland Islands, Albania, Algeria, American Samoa, Andorra, Angola, Anguilla, Antarctica, and Antigua and Barbuda. Below this list is a dropdown menu labeled "Allow to Choose State if it is Optional for Country" with the value "Yes" selected.

*State Options*

### To set up the state options:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **General**.
3. Expand ☺ the **State Options** section, and do the following:
  - a. In the **State is required for** list, select each country where Region/State is a required entry.
  - b. Set the **Allow to Choose State if It is Optional for Country** field to one of the following:
 

Yes	In countries where the state field is not required, includes the State field as an optional entry.
No	In countries where the state field is not required, omits the State field.
4. When complete, tap **Save Config**.



# Country Options

The Country Options identify the country where your business is located, and the countries from which you accept payment.

Country Options

Default Country

United States

Use system value

Allow Countries

Use system value

Zip/Postal Code is Optional for

Use system value


European Union Countries

Use system value

Top destinations

Country Options

### To set the country options for your store:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **General**.
3. Expand  the **Country Options** section, and do the following:
  - a. Choose the **Default Country** where your business is located.
  - b. In the **Allow Countries** list, select each country from which you accept orders. By default, all countries in the list are selected. To select multiple countries, hold down the Ctrl (PC) or Command (Mac) key.
  - c. In the **Zip/Postal Code is Optional for** list, select each country where you conduct business that does not require a ZIP or postal code to be included as part of the street address.
  - d. In the **European Union Countries** list, select each country in the EU where you conduct business. By default, all EU countries are selected.
  - e. In the **Top Destinations** list, select the primary countries that you target for sales.
4. When complete, tap **Save Config**.

## Merchant Location

The Merchant Location setting is used to configure **payment methods**. If no value is entered, the **Default Country** setting is used.

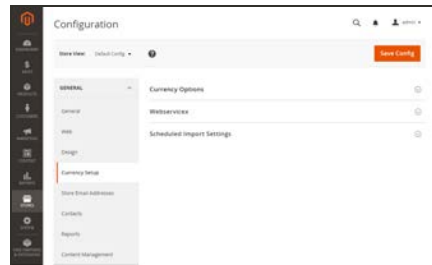
The screenshot shows a configuration panel titled "Merchant Location" with a close button in the top right corner. Inside the panel, there is a label "Merchant Country" with a small "(required)" text below it. To the right of the label is a dropdown menu currently displaying "--Please Select--". Below the dropdown, a small note states: "If not specified, Default Country from General Config will be used".

### *Merchant Location*

#### To enter the merchant location:

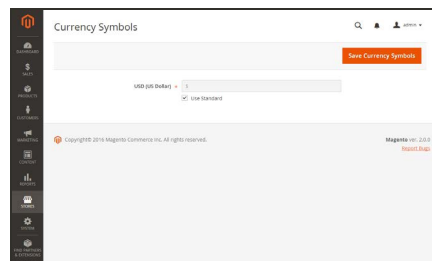
1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Payment Methods**.
3. Expand ☑ the **Merchant Location** section. Then, choose your **Merchant Country**.
4. When complete, tap **Save Config**.

# Currency



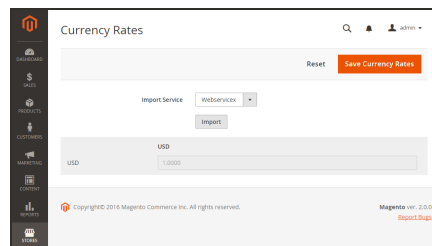
## Currency Setup

Defines the base currency and any additional currencies that are accepted as payment. Also establishes the import connection and schedule that is used to update currency rates automatically.



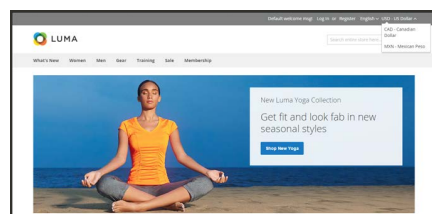
## Currency Symbols

Defines the currency symbols that appear in product prices and sales documents such as orders and invoices. Magento support currencies from over two hundred countries around the world.



## Updating Currency Rates

Currency rates can be updated manually or imported into your store as needed, or according to a predefined schedule.



## Currency Chooser

If multiple currencies are available, the currency chooser appears in the header of the store.

# Store Email Addresses

You can have up to five different email addresses to represent distinct functions or departments for each store or view. In addition to the following predefined email identities, there are two custom identities that you can set up according to your needs.

- General Contact
- Sales Representative
- Customer Support

Each identity and its associated email address can be associated with specific automated email messages and appear as the sender of email messages that are sent from your store.

**Process Overview:**

Step 1: [Set Up the Email Addresses for Your Domain](#)


Step 2: [Configure the Email Addresses for Your Store](#)

Step 3: [Update the Sales Email Configuration](#)

## Step 1: Set Up the Email Addresses for Your Domain

Before you can configure email addresses for the store, each must be set up as a valid email address for your domain. Follow the instructions from your server administrator or email hosting provider to create each email addresses that is needed.

## Step 2: Configure the Email Addresses for Your Store

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Store Email Addresses**.
3. Expand  the **General Contact** section, and do the following:

General Contact

Sender Name

(store view)

Owner

☒ Use system value

Sender Email

(store view)

owner@example.com

☒ Use system value

*General Contact*

- a. In the **Sender Name** field, type the name of the person to appear as the sender of any email messages that is associated with the General Contact identity.
  - b. In the **Sender Email** field, type the associated email address.
4. Repeat this process for each store email addresses that you plan to use.
  5. When complete, tap **Save Config**.

### Step 3: Update the Sales Email Configuration

If you use custom email addresses, make sure to update the configuration of any related email messages, so the correct identity appears as the sender.

1. In the panel on the left, under **Sales**, choose **Sales Emails**. The page has a separate section for each of the following:
  - Order and Order Comments
  - Invoice and Invoice Comments
  - Shipment and Shipment Comments
  - Credit Memo and Credit Memo Comments
  - RMA, RMA Authorization, RMA Admin Comments, and RMA Customer Comments
2. Starting with **Order**, expand the section for each message, and make sure that the correct sender is selected.

The screenshot shows the 'Order' configuration panel with the following settings:

- Enabled** (store view): Yes (dropdown), ☒ Use system value
- New Order Confirmation Email Sender** (store view): Sales Representative (dropdown), ☒ Use system value
- New Order Confirmation Template** (store view): New Order (Default) (dropdown), ☒ Use system value. Below the dropdown: Email template chosen based on theme fallback when "Default" option is selected.
- New Order Confirmation Template for Guest** (store view): New Order for Guest (Default) (dropdown), ☒ Use system value. Below the dropdown: Email template chosen based on theme fallback when "Default" option is selected.
- Send Order Email Copy To** (store view): [Empty text box], Comma-separated
- Send Order Email Copy Method** (store view): Bcc (dropdown), ☒ Use system value

#### *Sales Email Order Configuration*

3. When complete, tap **Save Config**.

## Contact Us

The Contact Us link in the footer of the store is an easy way for customers to keep in touch with you. Customers can complete the form to send a message to your store.



*Contact Us in Footer*

After the form is submitted, a thank you message appears.

 A screenshot of the 'Contact Us' page on the Luma website. The page has a header with the Luma logo and navigation links. The main content area has a heading 'Contact Us' and a paragraph: 'We love hearing from you, our Luma customers. Please contact us about anything at all. Your latest passion, unique health experience or request for a specific product. We'll do everything we can to make your Luma experience unforgettable every time. Reach us however you like'. Below this, there are sections for 'Phone' (1-800-403-8838), 'Apparel Design Inquiries', 'Press Inquiries', and 'Write Us'. The 'Write Us' section contains a form with fields for 'Name', 'Email', 'Phone Number', and 'What's on your mind?'. A 'Submit' button is at the bottom.

*Contact Us Page*

### To configure Contact Us:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Contacts**.

3. Expand  the **Contact Us** section. If necessary, set **Enable Contact Us** to “Yes.”


*Contact Us*

4. Expand  the **Email Options** section. Then, do the following:


*Email Options*

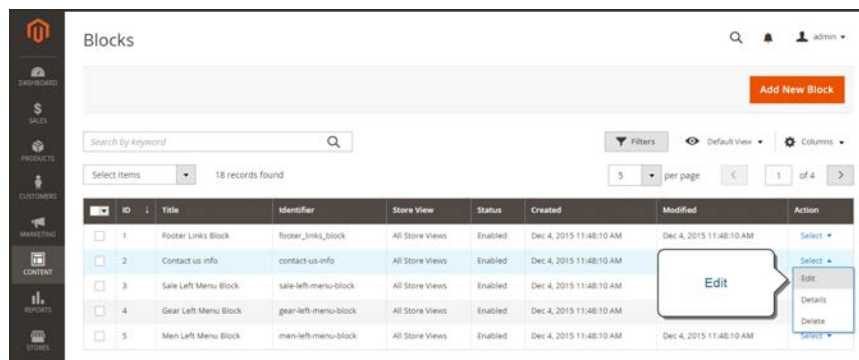
- a. In the **Send Emails to** field, enter the email address where messages from the Contact Us form are sent.
  - b. Set **Email Sender** to the store identity that appears as the sender of the message from the Contact Us form. For example: Custom Email 2.
  - c. Set **Email Template** to the template that is used for messages sent from the Contact Us form.
5. When complete, tap **Save Config.**

### To customize the Contact Us form:

The Luma sample data includes a Contact Us Info block that can be customized for your store. The `contact-us-info` block can be easily modified to add your own content to the Contact Us page.

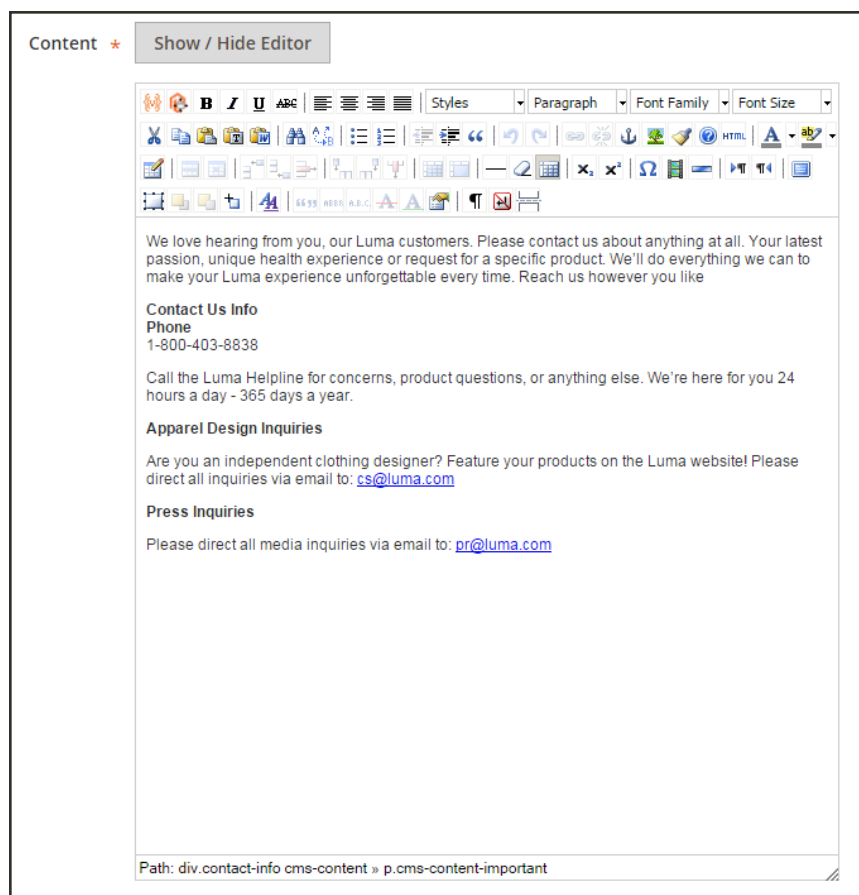
1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Blocks**.
2. Find the **Contact Us Info** block in the list, and open in **Edit** mode.





Contact Us Info

3. Scroll down to the **Content** field, and make any changes necessary.
  - Use the editor **toolbar** to format the text, and add **images** and **links**.
  - Tap **Show / Hide Editor** to work directly with the HTML.



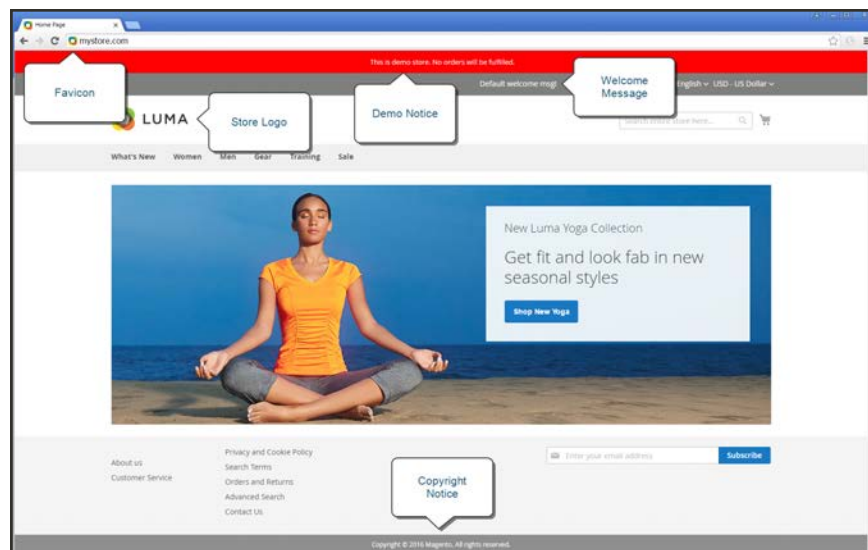
Contact Us Content

4. When complete, tap **Save Block**.

## CHAPTER 7:

# Storefront Branding

One of the first things you'll want to do is to change the logo in the header, and upload a favicon for the browser. You'll also want to update the copyright notice in the footer,. These are a few simple design tasks that you can take care of right away. While your store is in development, you can turn on the store demo notice, and then remove it when you're ready to launch.



*Storefront Branding*

## Uploading Your Logo

The size and location of the logo in the header is determined by the store's theme. Your logo can be saved as either a GIF, PNG, JPG, or SVG file type, and uploaded from the Admin of your store. The default Magento logo in the sample data is an SVG file, which is a scalable XML-based vector graphic format.



*Logo in Header*

The logo image resides in the following location on the server. Any image file with by that name and at that location is used as the theme logo.

**Actual path:** `app/design/frontend/[vendor]/[theme]/web/images/logo.svg`

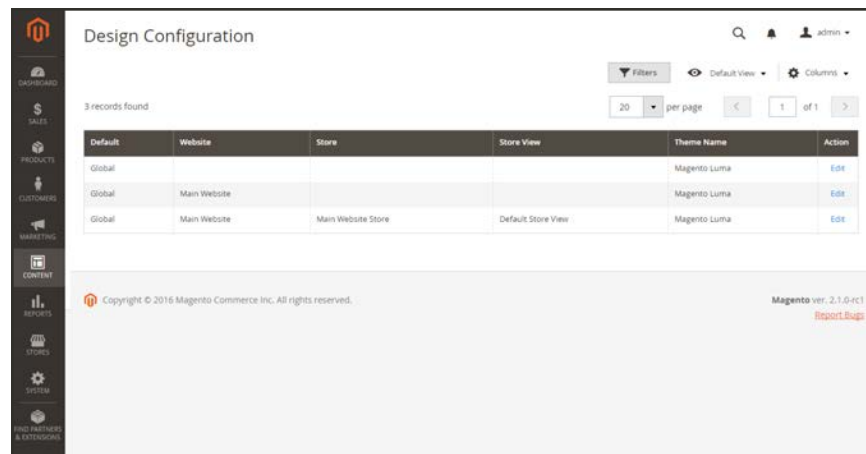
**Relative path:** `images/logo.svg`

If you don't know the size of the logo, or any other image that is used in your theme, open the page in a browser, right-click the image, and inspect the element.


In addition to the logo in the header, your logo also appears on [email templates](#) and on [PDF invoices](#) and other sales documents. The logos used for email templates and invoices have different size requirements, and must be uploaded separately. To learn more, see: [Communications](#).

## To upload your logo:

1. On the Admin sidebar, tap **Content**. Then under **Design**, choose **Configuration**.



*Design Configuration*

2. Find the store view that you want to configure, and in the **Action** column, click **Edit**.
3. Expand  the **Header** section. Then, do the following:

*Header*

- a. To upload a new logo, tap **Upload**. Then, choose the file from your computer.
  - b. Enter the **Logo Image Width** and **Logo Image Height**.
  - c. In the **Logo Image Alt** field, enter the text that you want to appear when someone hovers over the image.
4. When complete, tap **Save Configuration**.

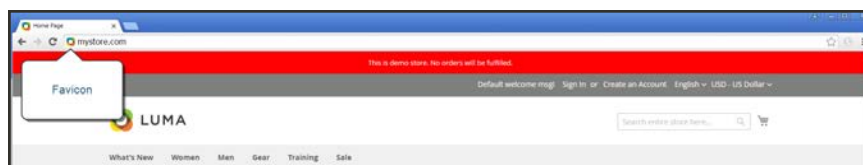
## Logo File Formats

FILE FORMAT	DESCRIPTION
PNG	(Portable Network Graphics) This newer alternative to the GIF format supports up to 16 million colors (24 bit). The lossless compression format produces a high-quality bitmap image with crisp text, but a larger file size than some formats. The PNG format supports transparent layers, and is designed to be both viewed and streamed online. The related MNG (APNG) formats support simple animation.
GIF	(Graphics Interchange Format) A widely supported, and older bitmap format that is limited to 256 (8 bit) colors. The GIF format supports simple animation and transparent layers.
JPG/JPEG	(Joint Photographics Expert Group) A compressed bitmap format that is used by most digital cameras. The lossy compression causes some data loss, which is sometimes noticeable as blurry spots in text.
SVG	(Scalable Vector Graphic) An XML-based open standard, scriptable vector format developed by the World Wide Web Consortium. SVG files support both animation and interaction.

## Adding a Favicon

Favicon is short for “favorite icon,” and refers to the little icon on the tab of each browser page. Depending on the browser, the favicon also appears in address bar, just before the URL.

Favicons are generally 16 x 16 pixels or 32 x 32 pixels in size. Magento accepts ICO, PNG, JPG, and SVG file types, although not all browsers support these formats. The most widely-supported file format to use for a favicon is ICO. Other image file types can be used, although the format might not be supported by all browsers. There are many free tools available online that you can use to generate an ICO image or convert an existing image to the format.



*Favicon in Address Bar*


### Process Overview:

- Step 1: [Create a Favicon](#)
- Step 2: [Upload the Favicon to Your Store](#)
- Step 3: [Refresh the Cache](#)

### Step 1: Create a Favicon

1. Create a 16 x 16 or 32 x 32 graphic image of your logo, using the image editor of your choice.
2. (Optional) Use one of the available online tools to convert the file to the .ico format. Then, save the file to your computer.

### Step 2: Upload the Favicon to Your Store

1. On the Admin sidebar, tap **Content**. Then under **Design**, choose **Configuration**.
2. In the grid, find the store view that you want to configure. Then in the **Action** column, click **Edit**.
3. Under **Other Settings**, expand  the **HTML Head** section. Then, do the following:

HTML Head

Favicon Icon

Allowed file types: ico, png, gif, jpg, jpeg, apng, svg. Not all browsers support all these formats!

Default Title:

Title Prefix:

Title Suffix:

Default Description:

Default Keywords:

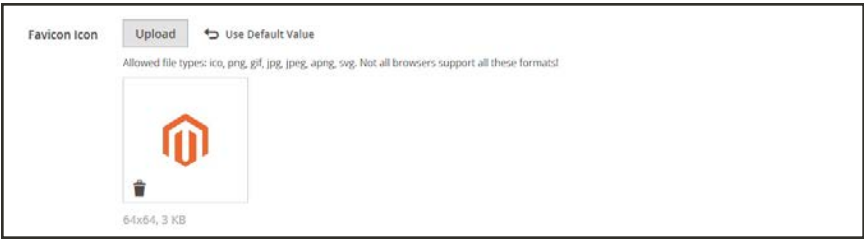
Scripts and Style Sheets:

This will be included before head closing tag in page HTML.


Display Demo Store Notice:

HTML Head

- a. Tap **Upload**. Then, navigate to the favicon file that you prepared, and tap **Open**.



Favicon

- b. If you want to delete the current favicon, tap **Delete** (  ) in the lower-left corner of the image. Then, upload another.
4. When complete, tap **Save Configuration**.

Step 3: Refresh the Cache

1. When prompted to refresh the cache, click the **Cache Management** link in the message at the top of the workspace.
2. In the list, mark the **Page Cache** checkbox that is marked “Invalidated.”
3. Set **Actions** to “Refresh.” Then, tap **Submit**.
4. To view the new favicon, return to your storefront and press **F5** to refresh the browser.

## Welcome Message

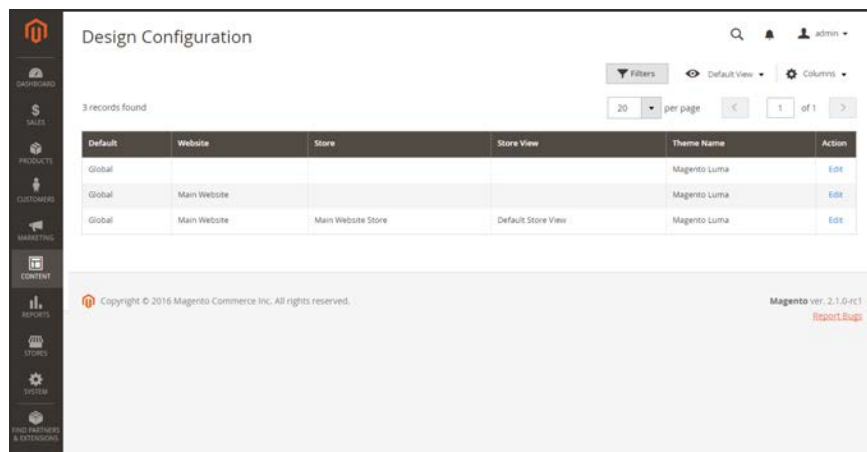
The Welcome message in the header expands to include the name of the customer who is logged in. Before you launch your store, be sure to change the default Welcome text for each store view.



*Welcome Message*

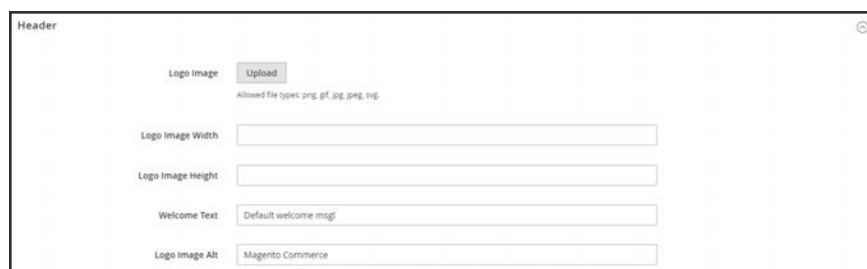
### To change the welcome message:

1. On the Admin sidebar, tap **Content**. Then under **Design**, choose **Configuration**.
2. In the grid, find the store view that you want to configure. Then in the **Action** column, click **Edit**. Then, do the following:



*Design Configuration*

- a. Under **Other Settings**, expand the **Header** section.
- b. Enter the **Welcome Text** that you want to appear in the header of your store.



*Header*



3. When complete, tap **Save Configuration**.
4. When prompted to update the Page Cache, click the **Cache Management** link at the top of the workspace. Then, follow the instructions to refresh the cache.

## Copyright Notice

Your store has a copyright notice in the footer of each page. As a best practice, the copyright notice should include the current year, and identify your company as the legal owner of the content on the site.



### *Copyright Notice*

The `&Copy;` character code is used to insert the copyright symbol, as shown in the following examples:

#### Long Format Example

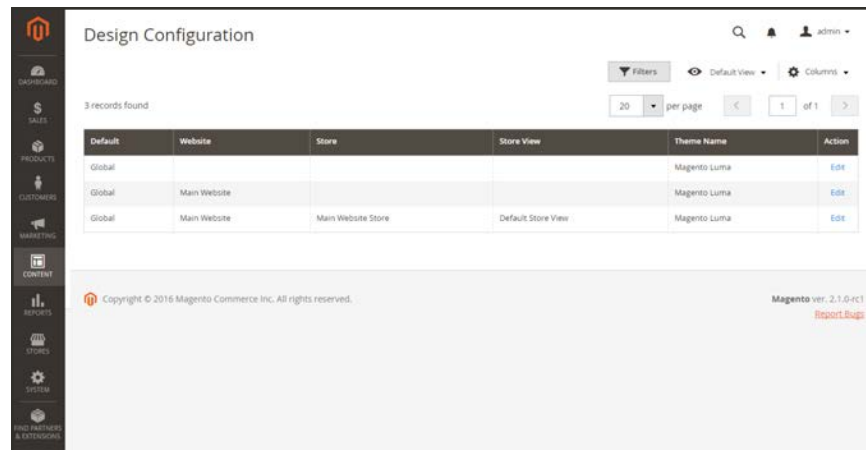
Copyright `&Copy;` 2016 Magento, Inc. All rights reserved.

#### Short Format Example

`&Copy;` 2016 Magento, Inc. All rights reserved.

### To change the copyright notice:

1. On the Admin sidebar, tap **Content**. Then under **Design**, choose **Configuration**.
2. In the grid, find the store view that you want to configure. Then in the **Action** column, click **Edit**, and do the following:

*Design Configuration*

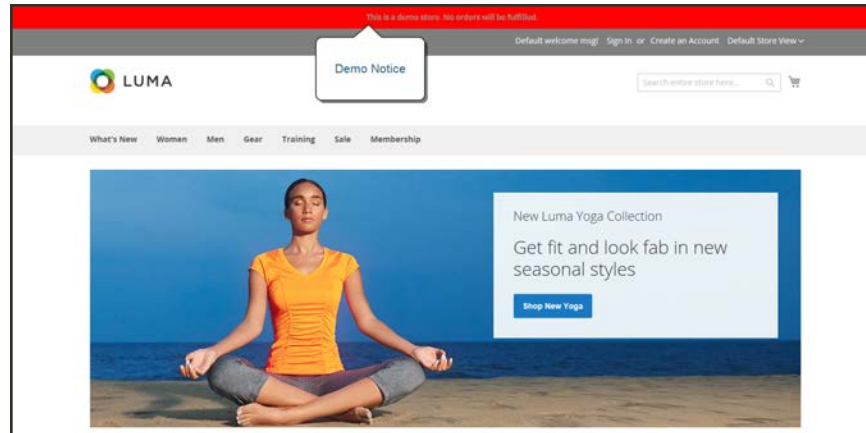
- a. Under **Other Settings**, expand  the **Footer** section.

*Footer*

- b. In the **Copyright** box, enter the copyright notice that you want to appear in the footer of each page. Use the `&Copy;` character code to insert a copyright symbol.
3. When complete, tap **Save Configuration**.


## Store Demo Notice

If your store is online, but still under construction, you can display a store demo notice at the top of the page to let people know that the store is not yet open for business. When you are ready to “go live,” simply remove the message. It’s like flipping the sign hanging in the window from “Closed” to “Open.” The format of the demo notice is determined by the theme of your store.



*Store Demo Notice*

### To set the store demo notice:

1. On the Admin sidebar, tap **Content**. Then under **Design**, choose **Configuration**.
2. In the grid, find the store view that you want to configure. Then in the **Action** column, click **Edit**.
3. Under **Other Settings**, expand  the **HTML Head** section.
4. Scroll down to the bottom, and set the **Display Demo Store Notice** to your preference.

HTML Head

Favicon Icon

Upload

Allowed file types: ico, png, gif, jpg, jpeg, svg. Not all browsers support all these formats!

Default Title

Magento Enterprise Edition

Title Prefix

Title Suffix

Default Description

Default Description

Default Keywords

Magento, Varien, E-commerce

Scripts and Style Sheets

<link rel="stylesheet" type="text/css" media="all" href="(MEDIA\_URL)styles.css" />

This will be included before head closing tag in page HTML.

Display Demo Store Notice

NO

HTML Head

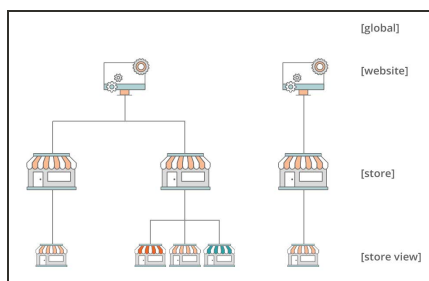
- 5. When complete, tap **Save Configuration**.



## CHAPTER 8:

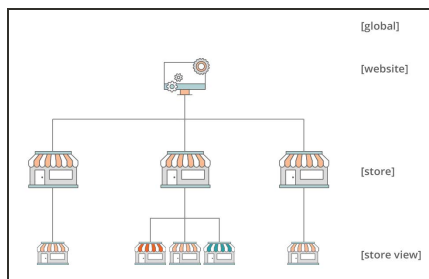
# Websites, Stores & Views

Every Magento installation has a **hierarchy** of website(s), store(s), and store view(s). The term “scope” determines where in the hierarchy a database entity — such as a product, attribute, or category — content element, or configuration setting applies. Websites, stores, and store views have one-to-many parent/child relationships. A single installation can have multiple websites, and each website can have multiple stores and store views.



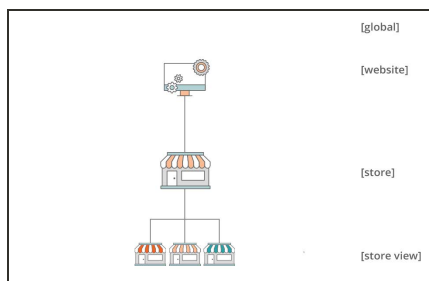
## Websites

Magento installations begin with a single website which by default, is called “Main Website.” You can also set up multiple websites for a single installation, each with its own IP address and domain.



## Stores

A single website can have multiple stores, each with its own main menu. The stores share the same product catalog, but can have a different selection of products and design. All stores under the same website share the same Admin and checkout.



## Store Views

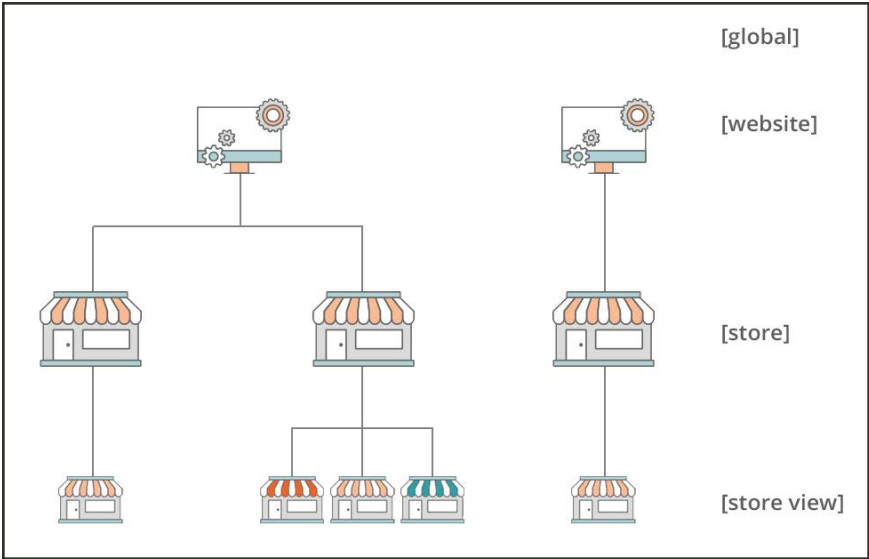
Each store that is available to customers is presented according to a specific “view”. Initially, a store has a single default view. Additional store views can be added to support different languages, or for other purposes. Customers can use the language chooser in the header to change the store view.

# Scope

If your Magento installation has a hierarchy of websites, stores, or views, you can set the context, or “scope” of a configuration setting to apply to a specific part of the installation. The context of many database entities can also be assigned a specific scope to determine how it is used in the store hierarchy. To learn more, see: [Product Scope](#) and [Price Scope](#).

Some configuration settings such as postal code, have a [global] scope because the same value is used throughout the system. The [website] scope applies to any stores below that level in the hierarchy, including all stores and their views. Any item with the scope of [store view] can be set differently for each view, and is typically used to support multiple languages.

Unless the store is running in [Single Store Mode](#), the scope of each configuration setting appears in small text below the field label. If your installation includes multiple websites, stores or views, you should always choose the [Store View](#) where the settings apply before making any changes.



*Hierarchy of Websites, Stores, and Store Views*

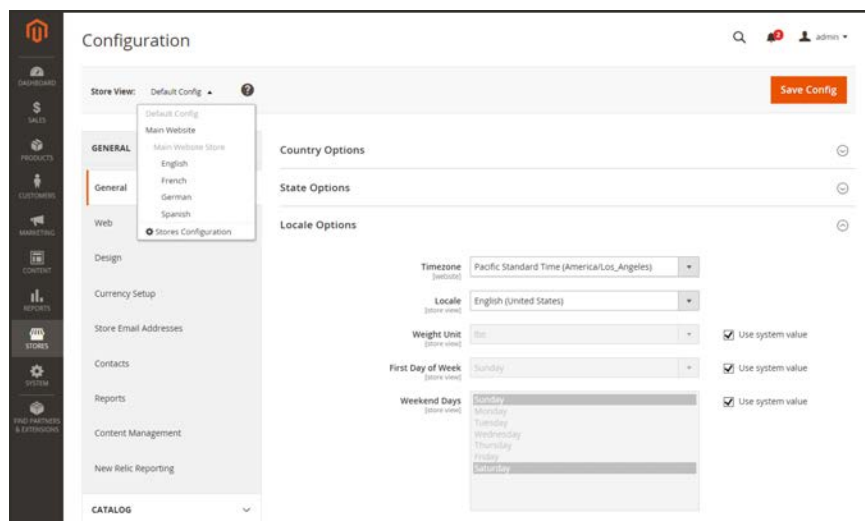
## Scope Settings

SCOPE	DESCRIPTION
Global	System-wide settings and resources that are available throughout the Magento installation.
Website	Settings and resources that are limited to the current website. Each website has a default store.
Store	Settings and resources that are limited to the current store. Each store has a default root category (main menu) and default store view.
Store View	Setting and resources that are limited to the current store view.

## Changing Scope

The Store View chooser in the upper-left corner of many Admin pages filters the view of the page for a specific scope, and also sets the value of some entities that are used by Magento. It lists each level in the hierarchy by name, and is used to change the scope to another level. Any settings that represent the current scope are grayed out, so only those that represent a scope change are available. The scope is initially set to “Default Config.” For Admin users with restricted access, the list of available store views includes only those which the user has **permission** to access.

The checkbox to the right of many configuration settings can be used to either apply or override the default setting, according to the current scope. The field value cannot be changed when the checkbox is marked. To change the current value, first clear the checkbox, and then enter the new value. You are prompted to confirm whenever you change scope. The checkbox label changes according to the current scope, and always refers to the parent level which is one step up in the hierarchy. Because the parent level is a container for all the items below that level, the value from the parent level is inherited unless it is overridden.



*Default Config with "Use System Value" Checkboxes*

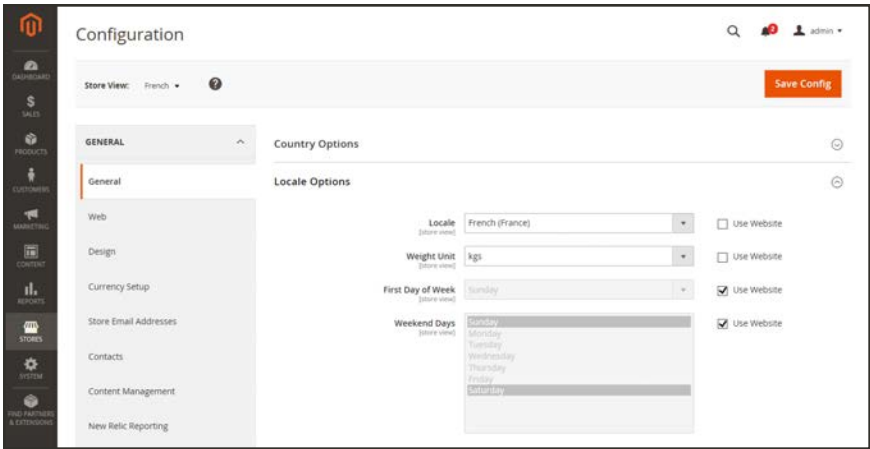
### To set the configuration scope:

Before making a configuration setting that applies only to a specific website, store, or view, do the following:

1. On the Admin sidebar, do one of the following:
  - For most configuration settings, tap **Stores**. Then under **Settings**, choose **Configuration**.
  - For **design-related settings**, tap **Content**. Under **Design**, choose **Configuration**. Then in the grid, choose the applicable store view.
2. Navigate to the configuration setting to be changed. Then, do the following:



- a. In the upper-left corner, set **Store View** to the specific view where the configuration applies. When prompted to confirm scope switching, tap **OK**.
  - A checkbox appears after each field, and additional fields might become available.
  - b. Clear the **Use system value** checkbox after any field that you want to edit. Then, update the value for the view.
  - c. Repeat this process for every field that needs to be updated on the page.
3. When complete, tap **Save Config**.



Setting the *Locale* of the French Store View

Store Hierarchy

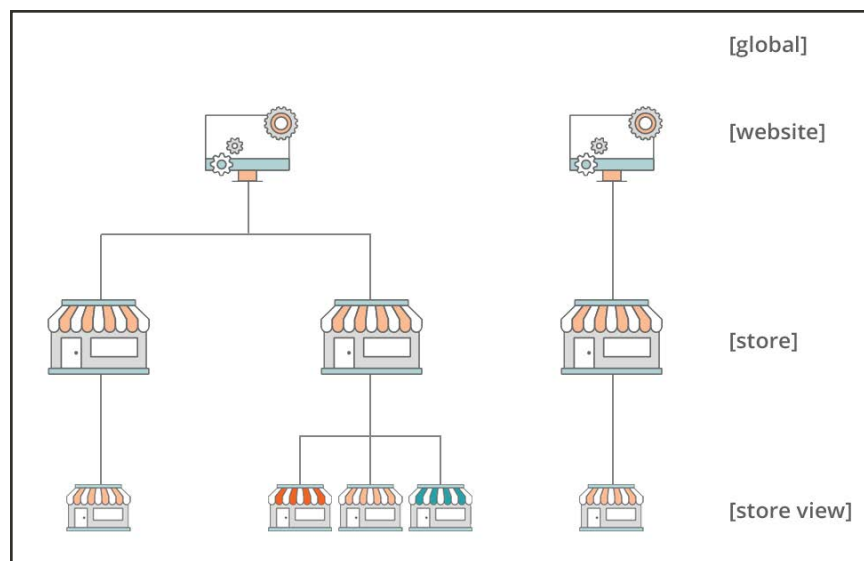
LEVEL	DESCRIPTION
Default Config	The default system configuration.
Main Website	The name of the website at the top of the hierarchy.
Main Website Store	The name of the default store that is associated with the parent website.
Default Store View	The name of the default store view that is associated with the parent store.
Stores Configuration	Jumps to the Stores grid, and is the same as choosing Stores > All Stores from the Admin sidebar.

### Default Value Options

CHECKBOX	DESCRIPTION
Use system value	The “Use system value” checkbox appears when the configuration scope is set to “Default Config.”
Use Default	The “Use Default” checkbox appears when the configuration scope is set to “Main Website,” and refers to the default store that is assigned to the website.
Use Website	The “Use Website” checkbox appears when the configuration scope set to a specific store view. When marked, it uses the setting from the parent website that is associated with the store view. In this case, the store level is skipped because it is understood to apply to the default store that is associated with the website.

## Product Scope

For installations with multiple websites, stores, and views, the **scope** setting determines where products are available for sale, and the product information that is available for each store view. Initially, all products that you create are published to the default website, store, and store view.



*Multisite Installation*

If you have only a single store with the default view, you can run your store in **Single Store Mode** to hide the scope settings. However, if your store has multiple views, a scope indicator appears below the name of each field.

- To edit product information for a specific view, use the Store View control in the upper-left corner to choose the view. Additional controls become available for any field that can be edited at the store view level.
- To define the scope of a product in a multisite installation, see the **Product in Websites** section of product information.

The process of editing a product for a store view is like adding a layer of product information that is specific to the view.

In the following example, although the Spanish store view is selected, the product information still appears in the original language of the default store view. To translate the product information, you must switch to the Spanish view, and translate the text fields — such as product title, description, and the meta data. To learn more, see: **Translating Products**.

## To edit a product for a different view:

1. In the upper-left corner, set **Store View** to the specific view to be edited. When prompted to confirm, tap **OK** to switch scope.



*Store View*

2. A checkbox appears below any field that can be edited for the store view. To override the default value, clear the **Use Default Value** checkbox. Then, update the field with the new value for the store view.



*Translating Product Name for Spanish Store View*

3. When complete, tap **Save**.
4. In the upper-left corner, set the **Store View** chooser back to the default.
5. To verify the change in your store, do the following:
  - a. In the upper-right corner, tap the **Admin** menu arrow. Then, choose **Customer View**.



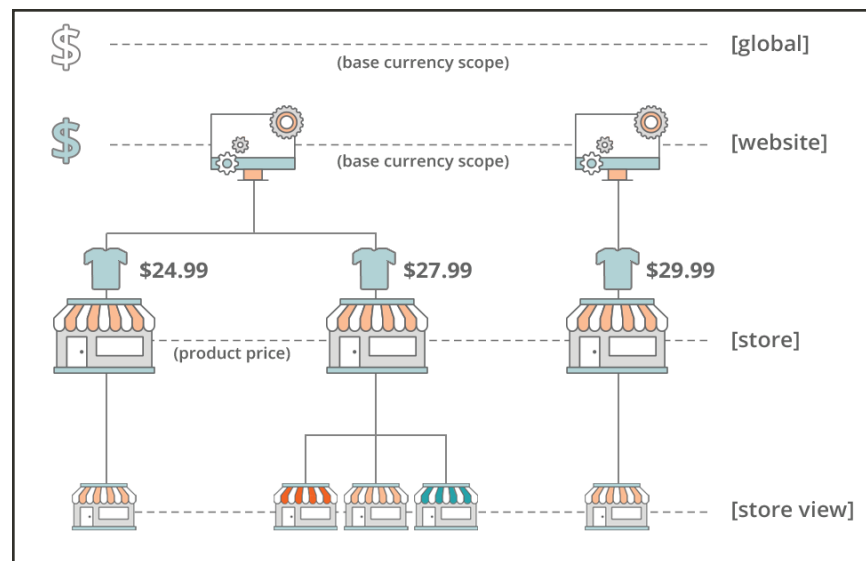
*Customer View*

- b. In the upper-right corner of the store, set the **Language Chooser** to the store view of the product that you edited. Then, find the product that you edited for the view.

## Price Scope

The scope of the **base currency** that is used for product prices can be configured to apply at either the global or website level. If applied at the global level, the same price is used throughout the store hierarchy. If the price configuration is set to the website level, the same product can be available at different prices in different stores. By default, the scope of catalog pricing is global.

Different factors can affect the price of the same product in one location and not another. For example, there might be additional costs to bring the product to market, and other considerations that impact the price of products sold in a specific store. The following illustration shows a multisite installation with the base currency set to the website level. In each store, the same product has a different price.



*Price Scope*

### To configure price scope:

1. On the Admin menu, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Catalog**.
3. Scroll down to the **Price** section. Then, set **Catalog Price Scope** to one of the following:
  - Global
  - Website

The scope setting that you choose appears below price fields in your catalog.



*Catalog Price Scope*

4. When complete, tap **Save Config**.

## Customer Account Scope

The scope of customer accounts can be limited to the website where the account was created, or shared with all websites and stores in the store hierarchy.

### To set the scope of customer accounts:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Customers**, choose **Customer Configuration**.
3. Expand ☺ the **Account Sharing Options** section.



*Account Sharing Options*

4. If necessary, clear the **User system value** checkbox. Then, set **Share Customer Accounts** to one of the following:

Global	Shares customer account information with every website and store in the Magento installation.
Per Website	Limits customer account information to the website where the account was created.
5. When complete, tap **Save Config**.

## Scope Quick Reference

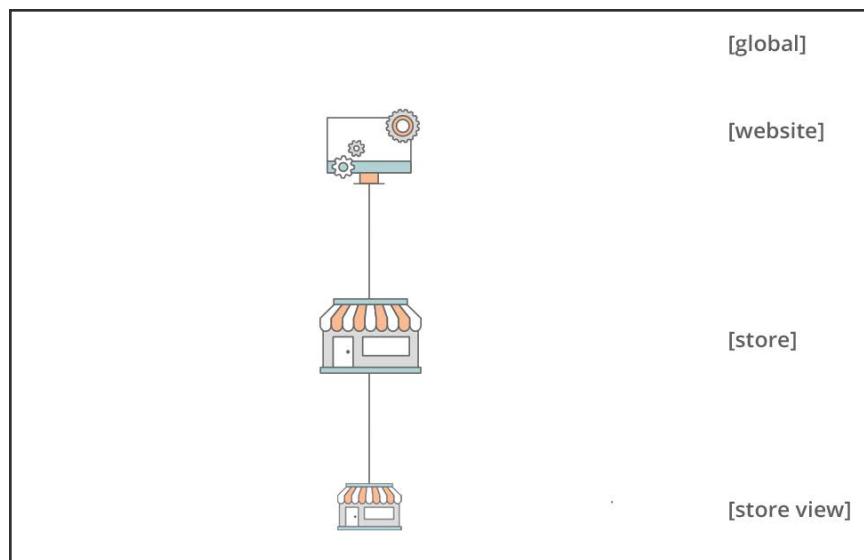
SCOPE	DESCRIPTION
<b>GLOBAL</b>	
Admin	All websites, stores, and store views in the installation are managed from the same <b>Admin</b> .
Default Config	The global <b>default configuration</b> settings are used through the store hierarchy, unless they are overridden at a lower level.
Catalog Prices	<b>Catalog prices</b> can be configured to be applied at either a global or website level.
Product Configurations	Attributes that are used as <b>configurable product</b> options must have a global scope.
Customers	Customer accounts can be configured to be applied at a global or website level. Each website can have a separate set of <b>customer accounts</b> , or share the same customer accounts with other websites in the installation.
<b>WEBSITE</b>	
Domain	Additional <b>websites</b> can be set up as subdomains of the primary domain, or have separate IP addresses and dedicated domains.
Customers	Customer accounts can be configured to be applied at a global or website level. Each website can have a separate set of <b>customer accounts</b> , or share the same customer accounts with other websites in the installation.
Currency	Each website can be assigned a different <b>base currency</b> . The base currency is used to process all transactions, although a different display currency might appear to the customer, according to the locale of the store view.
Product	Individual products are assigned to the hierarchy at the website level. The <b>Product in Websites</b> setting identifies each website where the product is available.
Catalog Prices	<b>Catalog prices</b> can be configured to be applied at either a global or website level.
Payment Methods	<b>Payment methods</b> are configured at the website level, although the title and instructions can be configured for each store view.



SCOPE	DESCRIPTION
Checkout	The <b>checkout process</b> takes place at the website level, although some display options can be configured for each store view.
<b>STORE</b>	
Catalog	Each store can have a separate <b>catalog</b> and main menu that is based on a "root" category and subcategories. The Catalog grid lists all products in the catalog.
Root Category	Each catalog has a <b>root category</b> that is assigned at the store level.
Checkout	All stores associated with a website have the same <b>checkout configuration</b> .
<b>STORE VIEW</b>	
Subcategories	The <b>subcategories</b> that make up the main menu (under the root) are assigned at the store view level.
Locale	Each store view can be assigned a different <b>locale</b> . The display currency, units of measurement, and most of the Admin interface are specific to the locale.
Languages	To support multiple languages, all content, including product descriptions, must be <b>translated</b> for each store view.
Display Currency	A different <b>display currency</b> can be used for each store view, although the transactions are processed at the website level using the base currency.

## Single Store Mode

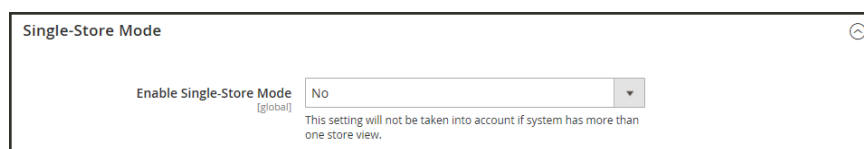
If your Magento installation has only a single store and store view, you can simplify the display by turning off all store view options and scope indicators. Most of the screenshots in this guide were taken with Single Store Mode disabled to show the scope indicator for each setting. Single Store Mode is overridden if you **add more store views** later.



*Single Website, Store, and View*

### To set single store mode:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. Under **General**, scroll down to the bottom of the page, and expand the **Single-Store Mode** section.
3. Set **Enable Single-Store Mode** to “Yes.”



*Single Store Mode*

4. Tap **Save Config**.

5. When prompted to refresh the cache, do the following:
  - a. Tap the **Cache Management** link in the system message at the top of the page.



*System Message*

- b. Mark the **Page Cache** checkbox.
    - c. With **Actions** set to “Refresh,” tap **Submit**.



## CHAPTER 9:

# Industry Compliance

Magento Commerce offers a range of security and privacy capabilities that meet legal requirements and industry guidelines for online merchants. Some are mandated by the payment card industry, and others are required by law, depending on your location.

- Legal Requirements
- Industry Guidelines
- Best Practices

In this chapter, you will learn about **PCI compliance**, and the importance of establishing procedures to protect payment information. You will also learn how to bring your store into compliance with **Global Data Protection Regulations** and the **cookie law**, which is required in some countries and considered to be a best practice in others. In addition, you will learn how to customize and maintain a **privacy policy** for your store.

## PCI Compliance Guidelines

The Payment Card Industry (PCI) has established a set of requirements for businesses that accept payment by credit card over the Internet. In addition to maintaining a secure server environment, merchants who handle customer credit card information must meet the following guidelines:

### PCI Requirements

- ☒ Install and maintain a firewall configuration to protect cardholder data.
- ☒ Do not use vendor-supplied defaults for system passwords and other security parameters.
- ☒ Protect stored cardholder data.
- ☒ Encrypt transmission of cardholder data across open, public networks.
- ☒ Use and regularly update antivirus software.
- ☒ Develop and maintain secure systems and applications.
- ☒ Restrict access to cardholder data by business need to know.
- ☒ Assign a unique ID to each person with computer access.
- ☒ Restrict physical access to cardholder data.
- ☒ Track and monitor all access to network resources and cardholder data.
- ☒ Regularly test security systems and processes.
- ☒ Maintain a policy that addresses information security.

To learn more, see: [Magento Approach to PCI Compliance](#).

As your business grows, you may be required to file a compliance report on an annual basis. PCI reporting requirements increase in proportion to merchant level, but are waived for businesses that process fewer than 20,000 credit card transactions per year. To learn more, visit the [PCI Security Standards Council](#) website.

## GDPR Compliance

The General Data Protection Regulation (GDPR) is legislation that regulates data protection and privacy for all individuals in the European Union and the European Economic Area. The legislation also applies to the export of personal data outside the EU. The GDPR was adopted in April 2016, and became enforceable on 25 May, 2018. Business that are not based in the EU, but engage in global commerce are required to comply with the regulation.

All organizations that process personal data must disclose the following:

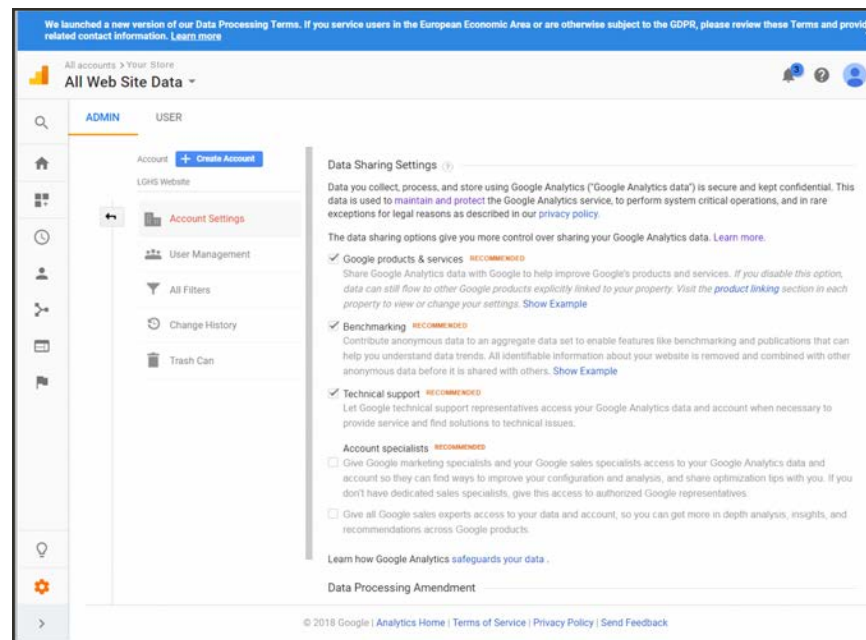
- The type of data that is collected
- The purpose for collecting the data
- The method that is used to collect the data
- How long the data is retained
- Whether or not the data is shared with others

Examine the current [privacy policies](#) for all of your Magento stores to ensure that they align with GDPR requirements. Update your [Google Analytics](#) settings to ensure that its use of personal data follows GDPR requirements. Maintain transparency, and keep thorough documentation.

Visit the [Magento website](#) to learn how Magento helps merchants prepare for GDPR compliance. For developers in need of technical information, including data flow diagrams and mapping, see: [Magento 2.1 GDPR compliance](#).

## Google Analytics Settings for GDPR

If your business operates in areas that are governed by the **General Data Protection Regulation**, some of the default settings of **Google Universal Analytics** and **Google Tag Manager** must be modified to comply with the regulation. Follow these steps to ensure that your use of customer data remains in compliance with the GDPR.



*Google Data Sharing Settings*

### Step 1: Update Google Settings

1. **Sign in** to your company's **Google Analytics** account.
2. At the bottom of the left sidebar, choose **Admin**. Then, navigate to the account that you want to edit, if applicable.
3. In the **Account** column, click **Account Settings**. Then, adjust the following settings to support GDPR requirements:

### Turn Off Data Sharing



The default Google Analytics settings share your company data with Google and other parties. To turn off data sharing, remove the checkmark from the following settings:

- Google products & services
- Benchmarking
- Technical support

- Account specialists

## Accept the Data Processing Amendment

The Google Ads Data Processing Terms describe how Google processes data, and the measures it takes to ensure data security for business that are subject to the GDPR. A record of your legal entities and contact information is also maintained with the amendment. To [learn more](#), click the link in the message at the top of the page.

1. Scroll down the page to **Data Processing Amendment**. Then, tap **View Adjustment**.
2. Tap **Review Amendment** to read the **Google Ads Data Processing Terms**. Then, tap **Accept**.
3. To complete the DPA Administration details, click **Manage DPA Details**.
4. In the **Legal Entities** section, click **Edit** (  ). Then, do the following:
  - a. Enter the registered name(s) of your organization.
  - b. When complete, tap **Save**.
5. In the **Contacts** section, click **Add** (  ). Then, do the following:
  - a. Enter the information for the first contact. Then, mark the checkbox of each applicable role.
 

Primary Contact	(Notification Email Address) The contact to whom notices are sent.
Data Protection Officer	(If applicable) The person who is designated to facilitate GDPR compliance,
EEA Representative	(If applicable) The person who represents customers outside of the EU regarding their GDPR obligations.
  - b. When complete, tap **Add**.
  - c. Repeat to add a contact for each role, if applicable.
6. When complete, tap **Save**.

## Step 2: Modify Your Google JS Libraries

Google supports three JavaScript libraries to measure website usage, depending on the Google product: `gtag.js`, `analytics.js`, and `ga.js`. To meet GDPR requirements, the standard code must be modified to:

## Anonymize IP Addresses

1. To anonymize the IP addresses used by **Google Universal Analytics**, add the following snippet to the `analytics.js` library on your web server:



**analytics.js**

```
ga('set', 'anonymizeIp', true);
```

To learn more, see the [Analytics.js Field Reference](#).

If you use the legacy `ga.js` library, add the following snippet:

**ga.js**

```
ga('set', 'anonymizeIp', true);
```

2. To anonymize the IP addresses used by **Google Tag Manager**, set the `anonymize_ip` parameter to `true` in the `gtag.js` library on your web server,

**gtag.js**

```
gtag('event', 'your_event', { 'anonymize_ip': true })
```

To learn more, see: [IP Anonymization in Analytics](#) in Google Help.

## Force SSL

To force all Google data to be transmitted over a secure socket layer (SSL), add the following snippet to the `analytics.js` library on your web server.

**analytics.js**

```
ga('set', 'forceSSL', true);
```

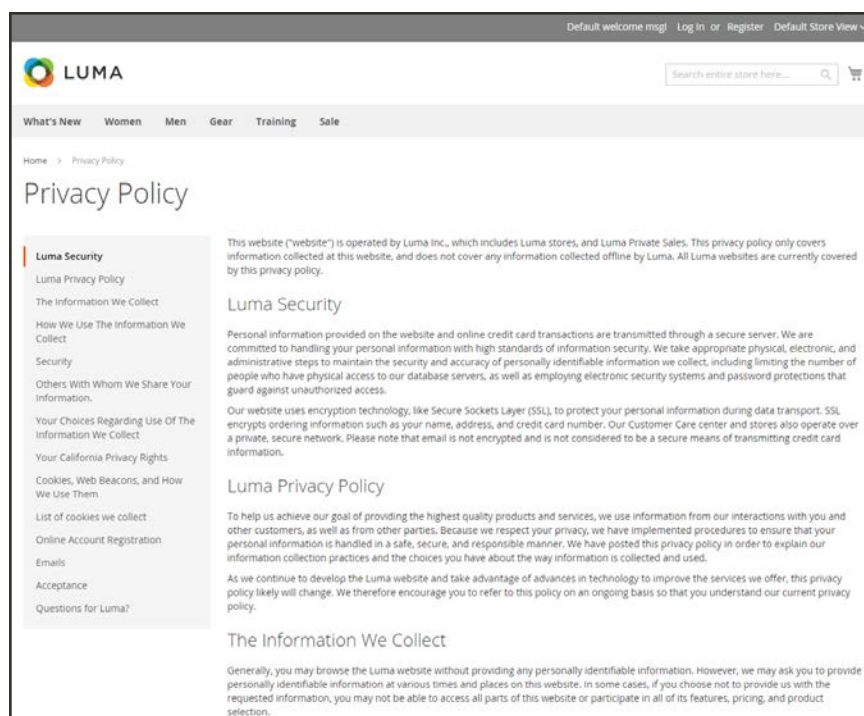
## Step 3: Update Your Privacy Policy

Update your [privacy policy](#) to state that your company:

- Uses Google Analytics
- Masks IP addresses to hide personal information
- Has turned off Google Data Sharing
- Does not use other Google services in conjunction with Google Analytics cookies.

## Privacy Policy

Your store includes a sample privacy policy that must be updated with your own information. Your privacy policy should describe the type of information that your company collects, and how it is used. It should also list the filenames of **cookies** that are placed on the computers of people who visit your store. Any additional cookies that are associated with third-party extensions and add-ons should be included in the list.

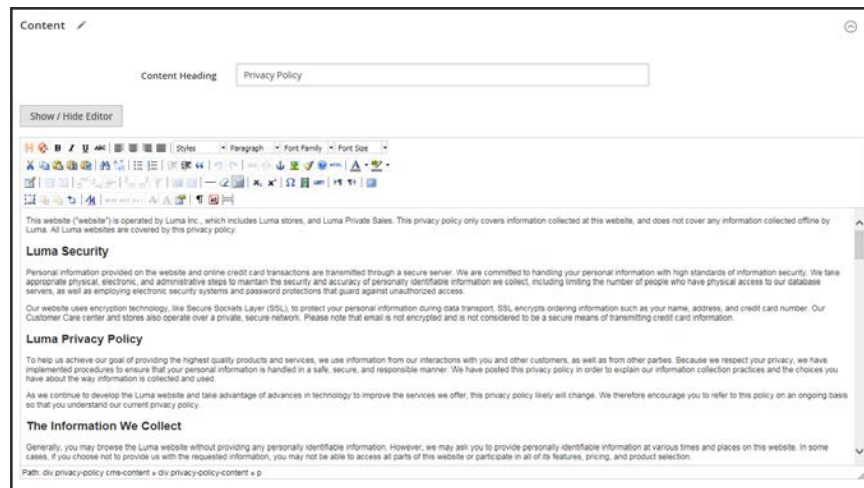


### *Privacy Policy*

### To edit your privacy policy:

The Luma sample data includes a sample privacy policy that you can modify for your use..

1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Pages**.
2. In the grid, find **Privacy Policy**. Then in the **Action** column, set **Select** to **Edit**.
3. Expand the **Content** section, and make the necessary changes to the content. To learn more, see: [Using the Editor](#).



### Content

If you change the URL key of the privacy policy page, you must also create a **custom URL rewrite** to redirect traffic to the new URL key. Otherwise, the link in the footer will return “404 Page Not Found.”

4. When complete, tap **Save Page**.

## Cookie Law Compliance

Cookies are small files that are saved to the computer of each visitor to your site, and used as temporary holding places for information. Information that is saved in cookies is used to personalize the shopping experience, link visitors to their shopping carts, measure traffic patterns, and improve the effectiveness of promotions. To keep pace with legislation in many countries regarding the use of cookies, Magento offers merchants a choice of methods for obtaining customer consent:

### Method 1: Implied Consent

Implied consent means that visitors to your store have a clear understanding that cookies are a necessary part of operations, and by using your site, have indirectly granted permission to use them. The key to gaining implied consent is to provide enough information for a visitor to make an informed decision. Many stores display a message at the top of all standard pages that provides a brief overview of how cookies are used, with a link to the store's privacy policy. The privacy policy should describe the type of information that your store collects, and how it is used.

### Method 2: Expressed Consent

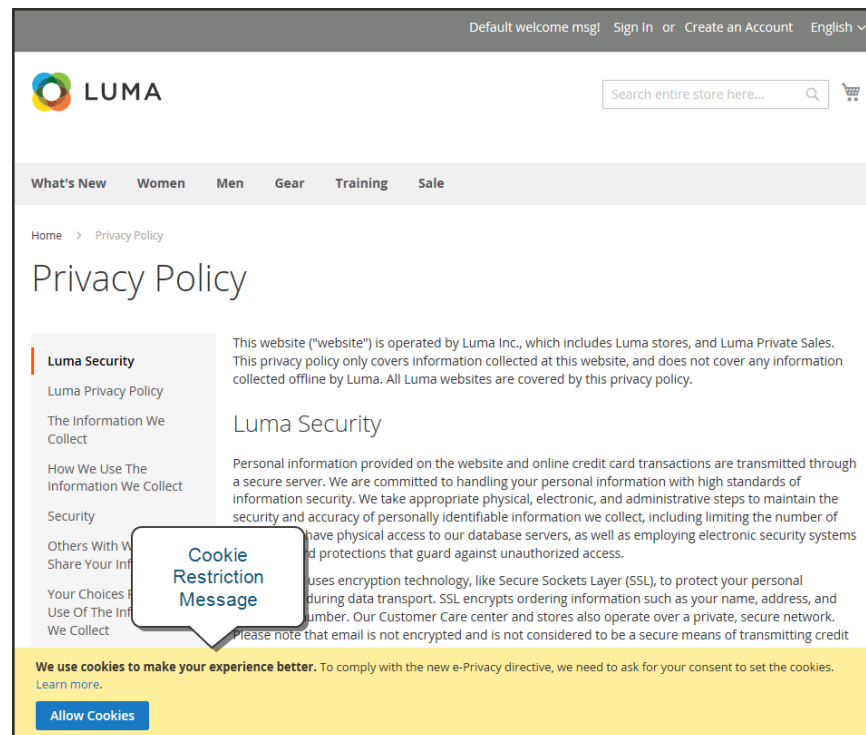
Operating your store in **cookie restriction mode** requires visitors to express their consent before any cookies can be saved to their computers. Unless consent is granted, many features of your store will be unavailable. For example, if Google Analytics is available for your store, it can be invoked only after the visitor has granted permission to use cookies.

## Cookie Restriction Mode

When Cookie Restriction Mode is enabled, visitors to your store are notified that cookies are required for full-featured operations. Depending on your theme, the message might appear above the header, below the footer, or somewhere else on the page. The message links to your privacy policy for more information, and encourages visitors to click the Allow button to grant consent. After consent is granted, the message disappears.

Your [privacy policy](#) should include the name of your store and contact information, and explain the purpose of each cookie that is used by your store. To learn more, see: [Cookie Reference](#).

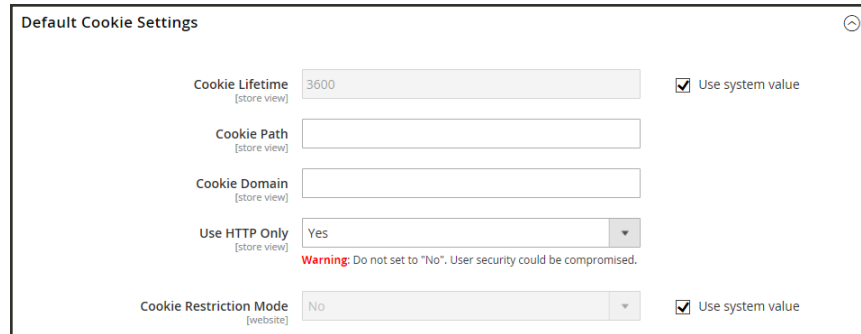
If you change the URL key of the privacy policy, you must also create a custom URL rewrite to redirect traffic to the new URL key. Otherwise, the link in the Cookie Restriction Mode message will return “404 Page Not Found.”



*Cookie Restriction Notice In Footer*

## Step 1: Enable Cookie Restriction Mode

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Web**. Expand the **Default Cookie Settings** section, and do the following:



**Default Cookie Settings**

Cookie Lifetime  ☒ Use system value

Cookie Path

Cookie Domain

Use HTTP Only  ☒ Use system value

**Warning:** Do not set to "No". User security could be compromised.

Cookie Restriction Mode  ☒ Use system value

### *Default Cookie Settings*

- a. Enter the **Cookie Lifetime** in seconds.
- b. If you want to make cookies available to other folders, enter the **Cookie Path**. To make the cookies available anywhere in the site, enter a forward slash.
- c. To make the cookies available to a subdomain, enter the subdomain name in the **Cookie Domain** field. (subdomain.yourdomain.com) To make cookies available to all subdomains, enter the domain name preceded by a period. (.yourdomain.com)
- d. To prevent scripting languages such as JavaScript from gaining access to cookies, make sure that **Use HTTP Only** is set to "Yes."
- e. Set **Cookie Restriction Mode** to "Yes."

If necessary, clear the checkbox, and tap **OK** to confirm scope switching.

3. When complete, tap **Save Config**.
4. When prompted to update the cache, click the **Cache Management** link in the system message. Then, refresh each invalid cache.

## Step 2: Update Your Privacy Policy

Update your **privacy policy** as needed to describe the information that your company collects, and how it is used.

## Cookie Reference

The default Magento cookies are classified as Exempt / Non-Exempt to help merchants meet **GDPR** requirements. Merchants should use this information as a guide, and consult with legal advisors to update their Privacy and Cookie Policies as part of a comprehensive GDPR compliance strategy.

### Magento 2.x Default Cookies

The following cookies are used by Magento Commerce “out of the box” for on-premise and cloud installations. These cookies may be required by functionality that is explicitly requested by the customer. To learn about the lifetime of session cookies, see: [Online Session Length](#).

Some of these cookies may provide configuration options, including enable/disable, as needed.

#### Requested Functionality Cookies (Exempt)

##### **add\_to\_cart**

Used by Google Tag Manager. Captures the product SKU, name, price and quantity removed from the cart, and makes the information available for future integration by third-party scripts.

##### **guest-view**

Stores the Order ID that guest shoppers use to retrieve their order status. Guest orders view. Used in "Orders and Returns" widgets.

- Is Secure? No
- HTTP Only: Yes
- Expiration Policy: Session
- Module: Magento\_Sales

##### **login\_redirect**

Preserves the destination page the customer was navigating to before being directed to log in. Used in mini cart for logged in customers if Stores > Settings > Configuration > Sales > Checkout > Shopping Cart Sidebar > **Display Shopping Cart Sidebar** is set to "Yes".

- Is Secure? No
- HTTP Only: No
- Expiration Policy: Session
- Module: Magento\_Customer

##### **mage-banners-cache-storage**

Stores banner content locally to improve performance.

**mage-messages**

Tracks error messages and other notifications that are shown to the user, such as the cookie consent message, and various error messages. The message is deleted from the cookie after it is shown to the shopper.

There is not an option to disable this cookie.

- Is Secure? No
- HTTP Only: No
- Expiration Policy: Duration 1 year. Cleared on frontend when the message is displayed to the user.
- Module: Magento\_Theme

**mage-translation-storage(local storage)**

Stores translated content when requested by the shopper. Used when **Translation Strategy** is configured as "Dictionary (Translation on Storefront side)".

- Is Secure? No
- HTTP Only: No
- Expiration Policy: Per local storage rules
- Module: Magento\_Translation

**mage-translation-file-version (local storage)**

Tracks the version of translations in local storage. Used when **Translation Strategy** is configured as "Dictionary (Translation on Storefront side)".

- Is Secure? No
- HTTP Only: No
- Expiration Policy: Per local storage rules
- Module: Magento\_Translation

**product\_data\_storage (local storage)**

Stores configuration for product data related to Recently Viewed / Compared Products.

- Is Secure? No
- HTTP Only: No
- Expiration Policy: Per local storage rules
- Module: Magento\_Catalog



**recently\_compared\_product (local storage)**

Stores product IDs of recently compared products.

- Is Secure? No
- HTTP Only: No
- Expiration Policy: Per local storage rules
- Module: Magento\_Catalog

**recently\_compared\_product\_previous (local storage)**

Stores product IDs of previously compared products for easy navigation.

- Is Secure? No
- HTTP Only: No
- Expiration Policy: Per local storage rules
- Module: Magento\_Catalog

**recently\_viewed\_product (local storage)**

Stores product IDs of recently viewed products for easy navigation.

- Is Secure? No
- HTTP Only: No
- Expiration Policy: Per local storage rules
- Module: Magento\_Catalog

**recently\_viewed\_product\_previous (local storage)**

Stores product IDs of recently previously viewed products for easy navigation.

- Is Secure? No
- HTTP Only: No
- Expiration Policy: Per local storage rules
- Module: Magento\_Catalog

**remove\_from\_cart**

Used by [Google Tag Manager](#). Captures the product SKU, name, price and quantity added to the cart, and makes the information available for future integration by third-party scripts.

**stf**

Records the time messages are sent by the SendFriend ([Email a Friend](#)) module.

- Is Secure? Yes
- HTTP Only: Yes
- Expiration Policy: Session
- Module: Magento\_SendFriend

**X-Magento-Vary**

Configuration setting that improves performance when using Varnish static content caching.

- Is Secure? Yes
- HTTP Only: Yes
- Expiration Policy: Based on PHP setting session.cookie\_lifetime
- Module: Magento\_PageCache

## Persistent Customization Session Cookies (Exempt)

### amz\_auth\_err

Used if "Enable Login with Amazon" is enabled. Value "1" indicates an authorization error.

- Is Secure? No
- HTTP Only: No
- Expiration Policy: 1 year
- Module: Amazon Pay

### amz\_auth\_logout

Used if "Enable Login with Amazon" is enabled. Value "1" indicates that the user should be logged out.

- Is Secure? No
- HTTP Only: No
- Expiration Policy: 86400s (24h)
- Module: Amazon Pay

### form\_key

A security measure that appends a random string to all form submissions to protect the data from Cross-Site Request Forgery (CSRF).

- Is Secure? No
- HTTP Only: No
- Expiration Policy:
  - PHP: Based on PHP setting session.cookie\_lifetime
  - JS: Session
- Module: Page Cache

### mage-cache-sessid

The value of this cookie triggers the cleanup of local cache storage. When the cookie is removed by the backend application, the Admin cleans up local storage, and sets the cookie value to "true."

- Is Secure? No
- HTTP Only: No
- Expiration Policy: Session
- Module: Magento\_Customer

**mage-cache-storage**

Local storage of visitor-specific content that enables ecommerce functions.

- Is Secure? No
- HTTP Only: No
- Expiration Policy: Session
- Module: Magento\_Customer, Magento\_Persistent

**mage-cache-storage (local storage)**

Local storage of visitor-specific content that enables ecommerce functions.

- Is Secure? No
- HTTP Only: No
- Expiration Policy: Session
- Module: Magento\_Customer, Magento\_Persistent, Magento\_NegotiableQuote

**mage-cache-storage-section-invalidation (local storage)**

Forces local storage of specific content sections that should be invalidated.

- Is Secure? No
- HTTP Only: No
- Expiration Policy: Per local storage
- Module: Magento\_Customer

**persistent\_shopping\_cart**

Stores the key (ID) of persistent cart to make it possible to restore the cart for an anonymous shopper.

- Is Secure? Yes
- HTTP Only: Yes
- Expiration Policy: Based on configuration **Persistent Shopping Cart** > General Options > Persistence Lifetime (seconds)
- Module: Magento\_Persistent

**private\_content\_version**

Appends a random, unique number and time to pages with customer content to prevent them from being cached on the server.

It is set in multiple places: in PHP, in JavaScript as a cookie, and in JavaScript to local storage.

For the HTTP Only Yes (based on request) means that the cookie Secure if set during HTTPS request, and unsecure if set during HTTP request.

- Is Secure? Yes (based on request), No
- HTTP Only:
  - PHP: 1 year / 315360000s (10yr)
  - JS: 1 day
  - JS local storage: Per local storage rules (forever)
- Expiration Policy: Based on configuration **Persistent Shopping Cart** > General Options > Persistence Lifetime (seconds)
- Module: Magento\_PageCache, Magento\_Customer

### **section\_data\_ids**

Stores customer-specific information related to shopper-initiated actions such as display wish list, checkout information, etc.

- Is Secure? No
- HTTP Only: No
- Expiration Policy: Session
- Module: Magento\_Customer

### **store**

Tracks the specific store view / locale selected by the shopper.

- Is Secure? No
- HTTP Only: Yes
- Expiration Policy: 1 year
- Module: Magento\_Store

### **mage-banners-cache-storage (local storage)**

Local storage for Banner functionality.

- Is Secure? No
- HTTP Only: No
- Expiration Policy: Per local storage rules
- Module: Magento\_Banner

## Google Analytics Cookies

The following cookies are used when **Google Universal Analytics** is fully enabled for your Magento installation. To disable these cookies for GDPR compliance, see: [Google Analytics Settings for GDPR](#). To learn more, see: [Google Analytics Cookie Usage on Websites](#).

## Google Universal Analytics Cookies (Non-Exempt)

JavaScript Libraries: gtag.js and analytics.js:

- `_ga`: Distinguishes visitors to your site.
- `_gid`: Distinguishes visitors to your site.
- `gat`: Used to throttle request rate.
- `dc_gtm_<property-id>`: Throttles request rate when Google Analytics is deployed with [Google Tag Manager](#).
- `AMP_TOKEN`: Contains a token that can be used to retrieve a Client ID from AMP Client ID service. Other possible values include opt-out, inflight request or an error retrieving a Client ID from AMP Client ID service.
- `_gac_<property-id>`: Contains campaign-related information for the user. Google AdWords conversion tags read this cookie if Google Analytics is linked to your [AdWords](#) account.

# P RODUCTS

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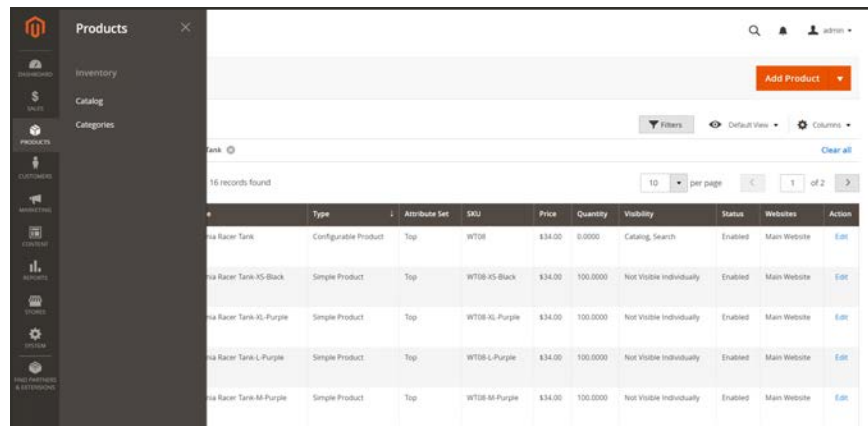
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## CHAPTER 10:

# Products Menu

The Products Menu provides easy access to product creation, category and inventory management, as well as tools to manage catalog content.

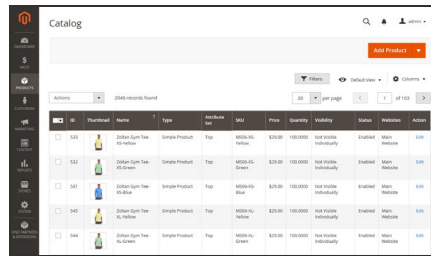


*Products Menu*

## To display the Products menu:

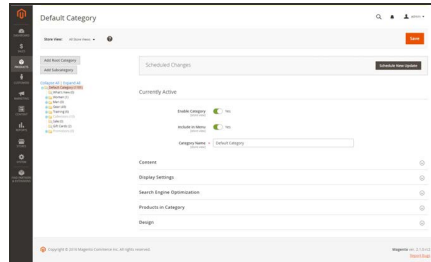
On the Admin sidebar, tap **Products**.

## Menu Options



### Catalog

Create new products of every type, and manage your inventory.



### Categories

Create the category structure that is the foundation of your store's navigation.

## CHAPTER 11:

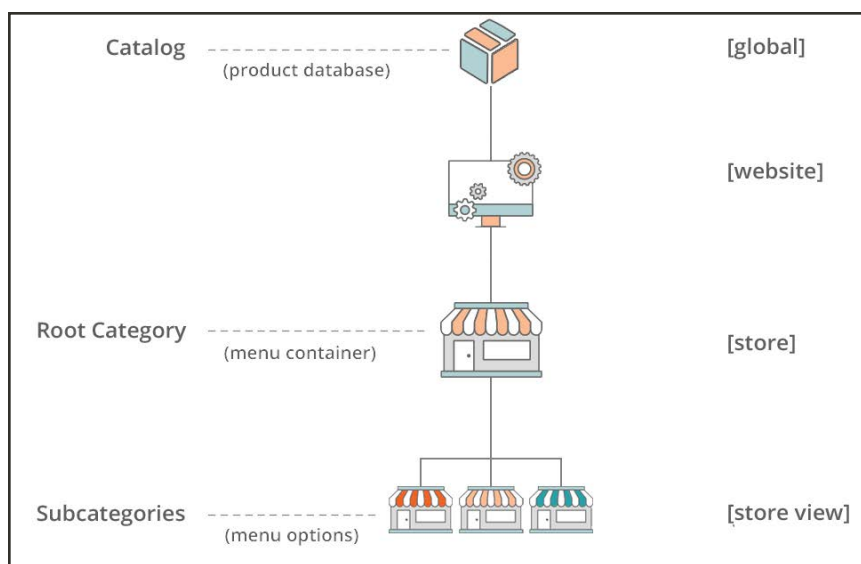
# Catalog

Magento uses the term "catalog" to refer to the products in the database. Access to the catalog data is determined by several factors, including the **scope** setting, the catalog configuration, and the **root category** that is assigned to the store. The catalog includes products that are enabled and available for sale, as well as those that are currently not offered for sale.

From the Admin, all products in the database are accessible through the **Catalog grid**. If your Magento installation has multiple websites, each website can offer a different selection of products for sale from the same database.

In sales, the term "catalog" has a more narrow definition, and usually refers to a specific selection of products that is available for sale. For example, a store might have a "Spring Catalog" and a "Fall Catalog".

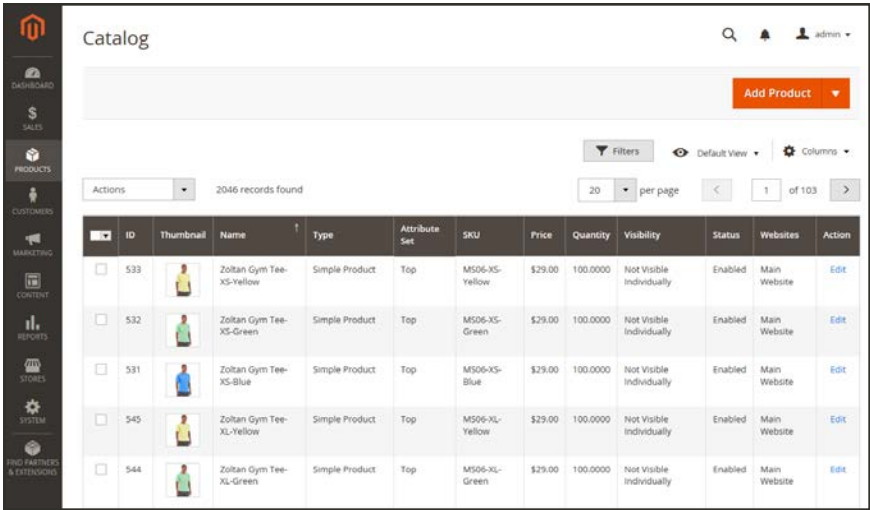
Like the table of contents of a printed catalog, the main menu of your store — or "top navigation" — organizes products by category to make it easy for customers to find what they want. The main menu is based on a "root category," which is a container for the menu that is assigned to the store. Because the specific menu options are defined at the store view level, each view can have a different main menu based on the same root category. Within each menu, you can offer a curated selection of products that is suitable for the store.



*Product Catalog in Store Hierarchy*

# Catalog Workspace

The Catalog grid lists all products in the catalog. Use the standard **controls** to sort and filter the list, find products, and apply **actions** to selected products. From the grid, you can create new products and edit existing ones.



Catalog Grid

## Workspace Controls

CONTROL	DESCRIPTION
<div>Add Product</div>	Initiates the process to create a new simple product. To choose a specific product type, click the down arrow. Options: <div>Simple Product</div> <div>Configurable Product</div> <div>Grouped Product</div> <div>Virtual Product</div> <div>Bundle Product</div> <div>Downloadable Product</div> <div>Gift Card</div>
Actions	Lists all actions that can be applied to selected products in the list. To apply an action to a product or group of products, mark the checkbox in the first column of each product. Options: <div>Delete</div> <div>Change Status</div> <div>Update Attributes</div>
Filters	Initiates a catalog search based on the current filters.

**Workspace Controls (cont.)**

CONTROL	DESCRIPTION
[Default] View	Indicates the current grid column layout. If there are saved grid column views, you can choose another.
Columns	Lists all actions that can be applied to selected products in the list. To apply an action to a product or group of products, mark the checkbox in the first column of each product. Product list actions include: Delete Change Status Update Attributes Use the <b>Columns control</b> to customize the selection of columns in the grid.
<b>Actions</b>	Can be used to select multiple records as the target of action. The checkbox is marked in the first column of each selected record. Options: Select/Deselect All, Select /Deselect All on This Page.
Edit	Opens the product in edit mode. You can accomplish the same thing by clicking anywhere on the row.

**Columns**

COLUMN	DESCRIPTION
Multiple Selection	Selects multiple records to be subject to an action. The checkbox in the first column of each selected record is marked . Options:  Select All      Selects all records found that match the current filter settings.  Select All on This Page      Selects only the records found on the current page that match the filter settings.
ID	A unique, sequential number that is assigned when a new product is saved for the first time.
Thumbnail	Displays a thumbnail of the main product image.
Name	The product name.
Type	The product type.
Attribute Set	The name of the attribute set that is used as a template for the product.
SKU	The unique Stock Keeping Unit that is assigned to the product.

**Columns (cont.)**

COLUMN	DESCRIPTION
Price	The unit price of the product.
Quantity	The quantity that is currently in stock.
Visibility	Indicates where the product is visible in the catalog. Options: Not Visible Individually Catalog Search Catalog, Search
Status	Indicates the current status of the product. Options: Enabled Disabled
Websites	Indicates the website(s) where the product is available.
Action	Opens the product in Edit mode.

## Catalog URLs

The URLs you assign to products and categories play a major role in determining how well your site is indexed by search engines. Before you start building your catalog is an ideal time to consider the available options.

### URL Formats

#### Dynamic URL

A dynamic URL is created “on the fly,” and might include a query string with variables for the product ID, sort order, and the page where the request was made. When a customer searches for a product in your store, the resulting URL might look something like this:

```
http://mystore.com/catalogsearch/result/?q=racer+back  
http://mystore.com/women/tops-women.html?style_general=135
```

#### Static URL

A static URL is a fixed address for a specific page. A static URL can be displayed in a search-engine friendly format, or one that references products and categories by ID. Search-engine friendly URLs include words that people might use to look for a product, and require Web Server Rewrites to be enabled. Files with static URLs are commonly used for product and category pages, content pages, and **theme assets**.

```
http://mystore.com/antonia-racer-tank.html
```

### URL Components

#### URL Key

The URL key is the part of a static URL that describes the product or category. When you create a product or category, an initial URL key is automatically generated, based on the name. To change the URL key, see the **Search Engine Optimization** section of the product information.

The URL key should consist of lowercase characters with hyphens to separate words. A well-designed, “search engine friendly” URL key might include the product name and key words to improve the way it is indexed by search engines. The URL key can be configured to create an automatic redirect if the URL key changes.

## HTML Suffix

Your catalog can be configured to either include or exclude the suffix as part of category and product URLs. There are various reasons why people might choose to use or to omit the suffix. Some believe that the suffix no longer serves any useful purpose, and that pages without a suffix are indexed more effectively by search engines. However, your company might have a standardized format for URLs that requires a suffix.

Because the suffix is controlled by the system configuration, you should never type it directly into the URL key of a category or product. (Doing so will result in a double suffix at the end of the URL.) Whether you decide to use the suffix or not, be consistent and use the same setting for all your product and category pages. Here are examples of URLs with—and without—a suffix.

```
http://mystore.com/helena-hooded-fleece.html  
http://mystore.com/helena-hooded-fleece.htm  
http://mystore.com/helena-hooded-fleece
```

## Category Path

You can configure the URL to either include or exclude the category path. By default, the category path is included in all category and product pages. The following examples show the same product URL with, and without, the category path.

### URL with Category Path

```
http://mystore.com/women/tops-women/hoodies-and-sweatshirts-women/helena-  
hooded-fleece.html
```


### URL without Category Path

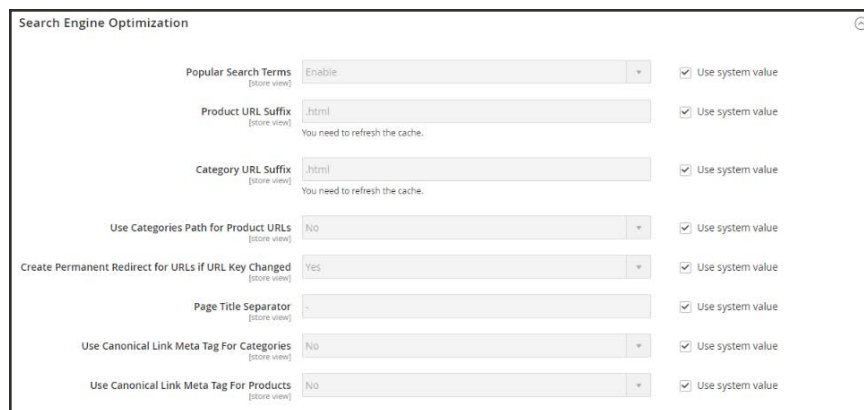
```
http://mystore.com/helena-hooded-fleece.html
```

To prevent search engines from indexing multiple URLs that lead to the same content, you can exclude the category path from the URL. Another method is to use a canonical meta tag to let search engines know which URLs to index and which to ignore. By default, Magento does not include the category path in product URLs.



## To configure catalog URLs:

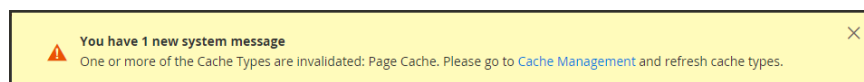
1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Catalog**.
3. Expand  the **Search Engine Optimizations** section, and do the following:
  - a. Set **Product URL Suffix** to “html” or “htm.” Enter the suffix without a period, because it is applied automatically.
  - b. Set **Category URL Suffix** to “html” or “htm.” Enter the suffix without a period, because it is applied automatically.
  - c. Set **Use Categories Path for Product URLs** to your preference.



Search Engine Optimization	
Popular Search Terms <small>(store view)</small>	Enable <input type="checkbox"/> Use system value
Product URL Suffix <small>(store view)</small>	.html <input type="checkbox"/> Use system value <small>You need to refresh the cache.</small>
Category URL Suffix <small>(store view)</small>	.html <input type="checkbox"/> Use system value <small>You need to refresh the cache.</small>
Use Categories Path for Product URLs <small>(store view)</small>	No <input type="checkbox"/> Use system value
Create Permanent Redirect for URLs if URL Key Changed <small>(store view)</small>	Yes <input type="checkbox"/> Use system value
Page Title Separator <small>(store view)</small>	> <input type="checkbox"/> Use system value
Use Canonical Link Meta Tag For Categories <small>(store view)</small>	No <input type="checkbox"/> Use system value
Use Canonical Link Meta Tag For Products <small>(store view)</small>	No <input type="checkbox"/> Use system value

### Search Engine Optimization

4. When complete, tap **Save Config**.
5. When prompted, click the **Cache Management** link in the system message, and refresh the invalid cache.



### Refresh Cache


# Dynamic Media URLs

A dynamic media URL is a relative reference to an image or other media asset. When enabled, dynamic media URLs can be used to link directly to assets on your server, or to files stored on a **content delivery network**. The use of dynamic media URLs can impact catalog performance, and the **editor** can be configured to use either static or dynamic media URLs for catalog product and category descriptions.

As with all **markup tags**, the code is enclosed in double curly braces. The format of a dynamic media URL looks like this:

```
{{media url="path/to/image.jpg"}}
```

## To configure dynamic media URLs:

- 1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
- 2. In the panel on the left under **Catalog**, choose **Catalog**. Then, expand  the **Storefront** section, and do the following:

Storefront

List Mode

Grid (default) / List

Products per Page on Grid Allowed Values

9,15,30

Products per Page on Grid Default Value

9

Products per Page on List Allowed Values

5,10,15,20,25

Products per Page on List Default Value

10

Allow All Products per Page

No

Product Listing Sort by

Position

Use Flat Catalog Category

No

Use Flat Catalog Product

No

Allow Dynamic Media URLs in Products and Categories

Yes

Swatches per Product

16

Use system value

Use system value

Use system value

Use system value

Use system value

Use system value

Use system value

Use system value

Use system value

Storefront

- a. Scroll down to Allow Dynamic Media URLs in Products and Categories. Then, clear the **Use system value** checkbox.
- b. Set **Allow Dynamic Media URLs in Products and Categories** to your preference.
3. When complete, tap **Save Config.**

### To use static URLs by default for media files:

By default, images inserted into the catalog from media storage have relative, dynamic URLs. If you prefer to use a static URL, you can change the configuration setting.

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Content Management**.
3. Expand ☺ the **WYSIWYG Options** section.

### *WYSIWYG Options*

4. Set **Use Static URLs for Media Content in WYSIWYG for Catalog** to “Yes.”
5. When complete, tap **Save Config.**

# Using a Flat Catalog

Magento typically stores catalog data in multiple tables, based on the Entity-Attribute-Value (EAV<sup>1</sup>) model. Because product attributes are stored in many tables, SQL queries are sometimes long and complex.

In contrast, a flat catalog creates new tables on the fly, where each row contains all the necessary data about a product or category. A flat catalog is updated automatically—either every minute, or according to your cron job. Flat catalog indexing can also speed up the processing of catalog and cart price rules. A catalog with as many as 500,000 SKUs can be indexed quickly as a flat catalog.

Before you enable a flat catalog for a live store, make sure to test the configuration in a development environment.

**Process Overview:**

Step 1: [Enable the Flat Catalog](#)

Step 2: [Verify the Results](#)

## Step 1: Enable the Flat Catalog

- 1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
- 2. In the panel on the left under **Catalog**, choose **Catalog**.
- 3. Expand ☯ the **Storefront** section. Then, do the following:
  - a. Set **Use Flat Catalog Category** to “Yes.” If necessary, clear the **Use system value** checkbox.
  - b. Set **Use Flat Catalog Product** to “Yes.”

Use Flat Catalog Category  
[global]

Yes

▼

☐ Use system value

Use Flat Catalog Product  
[global]

Yes

▼

Flat Catalog Configuration

- 4. When complete, tap **Save Config**.
- 5. When prompted to update the cache, click the **Cache Management** link in the system message, and follow the instructions to refresh the cache.

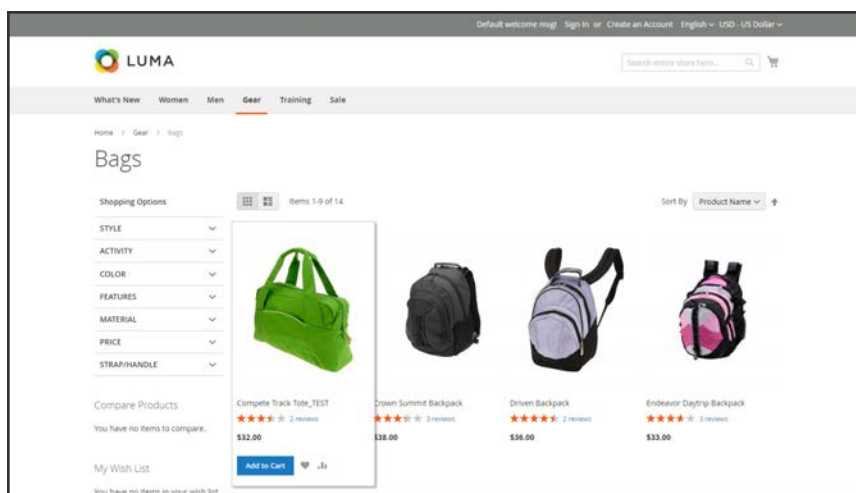
<sup>1</sup>Entity Attribute Value

## Step 2: Verify the Results

### Method 1: Verify the Results for a Single Product

- On the Admin sidebar, tap **Products**. Then under **Inventory**, choose **Catalog**.
  - Open a product in edit mode.
  - In the **Name** field, add the text “\_TEST” to the end of the product name.
- Tap **Save**.
- On a new browser tab, navigate to the home page of your store. Then, do the following:
  - Search for the product you edited.
  - Use the navigation to browse to the product under its assigned category.

If necessary, refresh the page to see the results. The change will appear within the minute, or according to your **Cron** schedule.




Storefront with Flat Catalog

### Method 2: Verify the Results for a Category

- On the Admin sidebar, tap **Products**. Then under **Inventory**, choose **Categories**.
- In the upper-left corner, verify that **Store View** is set to "All Store Views."  
If prompted, tap **OK** to confirm.
- In the category tree, select an existing category. Then, tap **Add Subcategory**, and do the following:

- a. In the **Category Name** field, enter “Test Category.”
- b. When complete, tap **Save**.

### *Test Subcategory*

- c. Expand  the **Products in Category** section. Then, click **Reset Filter** to display all products.
- d. Mark the checkbox of several products to add them to the new category. Then, tap **Save**.

	ID	Name	SKU	Price	Position
<input type="checkbox"/>		backpack		From To	From To
<input checked="" type="checkbox"/>	12	Driven Backpack	24-WB03	\$36.00	
<input checked="" type="checkbox"/>	11	Endeavor Daytrip Backpack	24-WB06	\$33.00	
<input checked="" type="checkbox"/>	6	Fusion Backpack	24-MB02	\$59.00	
<input checked="" type="checkbox"/>	3	Crown Summit Backpack	24-MB03	\$38.00	

### *Test Category Products*

4. On a new browser tab, navigate to the home page of your store. Then, use the store navigation to browse to the category you created.

If necessary, refresh the page to see the results. The change will appear within the minute or according to your cron schedule.

### Step 3: Remove the Test Data

Do the following to remove the test data and restore the original product name and catalog configuration:


#### Remove the test category:

1. On the Admin sidebar, tap **Products**. Then under **Inventory**, choose **Categories**.
2. In the category tree, select the test subcategory that you created.
3. In the upper-right corner, tap **Delete**. Then when prompted to confirm, tap **OK**.  
This will not remove the products that are assigned to the category.

#### Restore the original product name:

1. On the Admin sidebar, tap **Products**. Then under **Inventory**, choose **Catalog**.
2. Open the test product in edit mode.
3. Remove the "\_TEST" that you added to the **Product Name**.
4. In the upper-right corner, tap **Save**.

#### Restore the original catalog configuration:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Catalog**.
3. Expand  the **Storefront** section," and do the following:
  - a. Set **Use Flat Catalog Category** to "No."
  - b. Set **Use Flat Catalog Product** to "No."
4. When complete, tap **Save Config**. Then when prompted, refresh the cache.



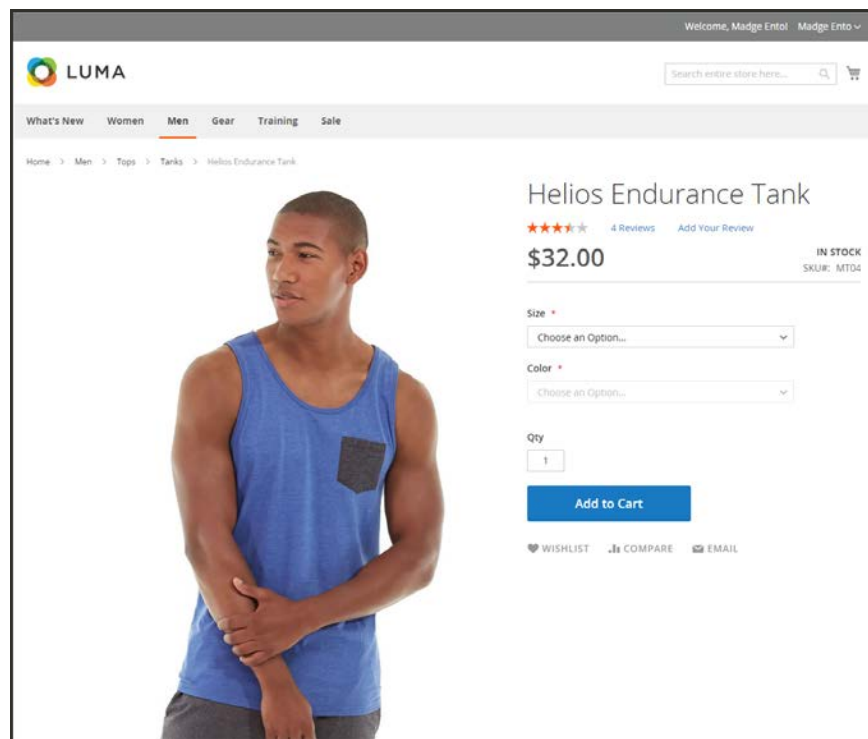


## CHAPTER 12:

# Creating Products

Choosing a product type is one of the first things you must do to create a new product. In this chapter, you will learn how to create a product of each type. In addition to the basic product types, the term, **complex product**<sup>1</sup> refers to a product that requires the customer to choose from a selection of options before making a purchase. To learn more about the available options, see [Basic Settings](#) and [Advanced Settings](#).

If you are just starting out, you can create a few sample products to experiment with each product type. For a deeper understanding, make sure to read about catalog **navigation**, how to set up **categories** and attributes, and the catalog **URL options** that are available to you.



*Product Catalog*

---

<sup>1</sup>A product that requires the customer to choose from a selection of options.

## Product Workspace



The product workspace is basically the same for all product types, although the selection of fields changes depending on the attribute set that is used. The product attributes are at the top of the form, followed by expandable sections of product information. When a new product is saved for the first time, the Store View chooser appears in the upper-left of the form.

The screenshot displays the 'New Product' form within the Magento Product Workspace. The interface features a dark sidebar on the left with navigation icons for Dashboard, Sales, Products, Customers, Marketing, Content, Reports, Emails, System, and Integrations & Extensions. The main content area is titled 'New Product' and includes a search bar, a user profile icon, and a 'Back' button. Below these are 'Add Attribute' and 'Save' buttons. The form fields are organized into sections: 'Enable Product' (toggle set to 'Yes'), 'Attribute Set' (dropdown set to 'Default'), 'Product Name' (text field with a store view selector), 'SKU' (text field), 'Price' (text field with an 'Advanced Pricing' link), 'Tax Class' (dropdown set to 'Taxable Goods'), 'Quantity' (text field with an 'Advanced Inventory' link), 'Stock Status' (dropdown set to 'In Stock'), 'Weight' (text field with a unit dropdown), 'Categories' (dropdown with a 'New Category' button), 'Visibility' (dropdown set to 'Catalog Search'), and 'Country of Manufacture' (text field). At the bottom of the form, there are checkboxes for 'Enable RMA' (set to 'No') and 'Use Config Settings' (checked). Below the form fields are expandable sections for 'Content', 'Configurations', 'Images And Videos', 'Search Engine Optimization', 'Related Products, Up-Sells, and Cross-Sells', 'Customizable Options', 'Product in Websites', 'Design', 'Gift Options', and 'Downloadable Information'. The 'Configurations' section includes a 'Create Configurations' button. The footer of the page shows the Magento logo, copyright information for 2017, and the version '2.1.2' with a 'Report Bug' link.

*Product Workspace*

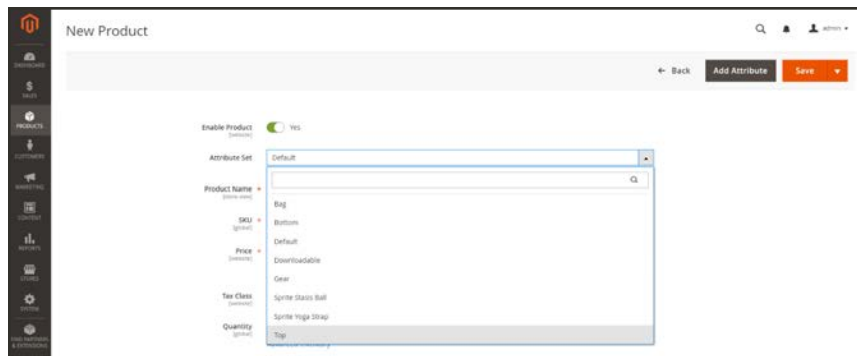
## Enable Product

The online status of the product is indicated by the switch at the top of the form. To change the online status, simply set the Enable Product switch to the “Yes” or “No” position.

CONTROL	DESCRIPTION
	Indicates that the product is currently online.
	Indicates that the product is currently offline.

## Attribute Set

The name of the **attribute set** appears in the upper-left corner, and determines the fields that appear in the product record. To choose a different attribute set, click the down arrow next to the default attribute set name.



*Attribute Sets*

## Expand/Collapse

To expand or collapse a section, tap either the expand  or collapse  button to the right.

Save Menu

The Save menu includes several options that let you save and continue, save and create a new product, save and duplicate the product, or save and close.



Save Menu

COMMAND	DESCRIPTION
Save	Save the current product, and continue working.
Save & New	Save and close the current product, and begin a new product, based on the same product type and template.
Save & Duplicate	Save and close the current product, and open a new duplicate copy.
Save & Close	Save the current product and return to the Inventory workspace.

## Default Field Values

To save time when creating products, the default value of several product fields references values from another field. You can either accept the default value, or enter another. The following fields have automatically generated default values:

FIELD	DESCRIPTION
SKU	Based on product Name.
Meta Title	Based on product Name.
Meta Keywords	Based on product Name.
Meta Description	Based on product Name and Description.

The placeholders that represent the value of another field are enclosed in double-curly braces. Any attribute code that is included in the product **attribute set** can be used as a placeholder.

Product Fields Auto-Generation

Mask for SKU

[global]

{{name}}

Use {{name}} as Product Name placeholder

☒ Use system value

Mask for Meta Title

[global]

{{name}}

Use {{name}} as Product Name placeholder

☒ Use system value

Mask for Meta Keywords

[global]

{{name}}

Use {{name}} as Product Name or {{sku}} as Product SKU placeholders

☒ Use system value

Mask for Meta Description

[global]


{{name}} {{description}}

Use {{name}} and {{description}} as Product Name and Product Description placeholders

☒ Use system value

Product Fields Auto-Generation

### To edit the placeholder value:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Catalog**.
3. Expand  the **Product Fields Auto-Generation** section. Then, make any changes needed to the placeholder values.

For example, if there's a specific keyword that you want to include for every product, or a phrase that you want to include in every meta description, you can type the value directly into the appropriate field.

If you want to keep the existing placeholder values, be careful to preserve the double curly braces that enclose each markup tag.

4. When complete, tap **Save Config**.

### Common Placeholders

#### PLACEHOLDER

{{color}}

{{country\_of\_manufacture}}

{{description}}

{{gender}}

{{material}}

{{name}}

{{short\_description}}

{{size}}

{{sku}}

## Scheduled Changes

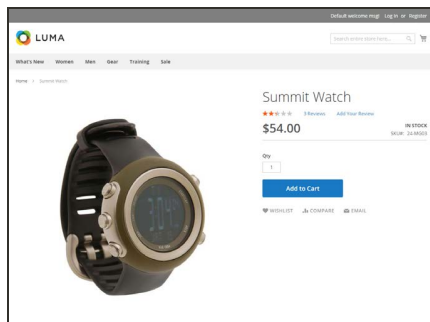
Product updates can be applied on schedule, and grouped with other content changes. You can create a new campaign based on scheduled changes to the product, or apply the changes to an existing campaign. To learn more, see: [Content Staging](#).

The screenshot shows the 'Scheduled Changes' interface for the 'Joust Duffle Bag' product. The interface includes a sidebar with navigation options: Dashboard, Sales, Products, Customers, Marketing, Content, Reports, System, and Advanced Search & Filters. The main content area is titled 'Joust Duffle Bag' and features a 'Scheduled Changes' section. This section displays a table with columns for date, time, status, and description. A single entry is shown for 'Jun 20, 2016' at '3:34 AM', with a status of 'Start' and a description of 'Duffle Bag Summer Solstice Special'. Below the table, there are controls for 'Store View' (set to 'All Store Views'), 'Back', 'Add Attribute', and 'Save'. The 'Enable Product' toggle is set to 'Yes'. The 'Attribute Set' is 'Bag'. The 'Product Name' is 'Joust Duffle Bag'. The 'SKU' is '24-MB01'. The 'Price' is '\$ 34.00'. There is a link for 'Advanced Pricing'.

Date	Time	Status	Description
Jun 20, 2016	3:34 AM	Start	Duffle Bag Summer Solstice Special

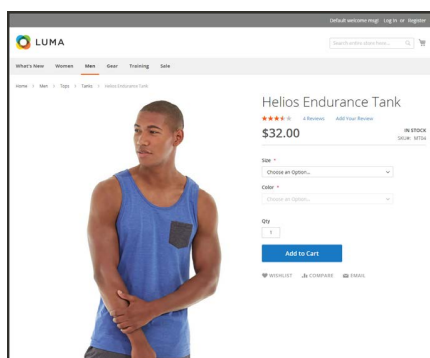
*Scheduled Changes*

## Product Types



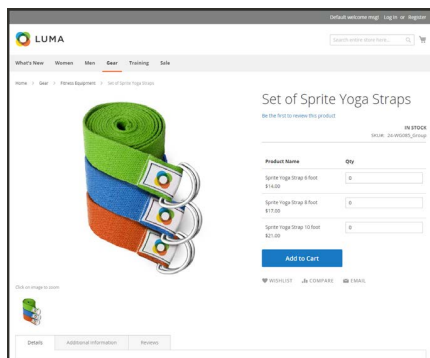
### Simple Product

A simple product is a physical item with a single SKU. Simple products have a variety of pricing and of input controls which makes it possible to sell variations of the product. Simple products can be used in association with grouped, bundle, and configurable products.



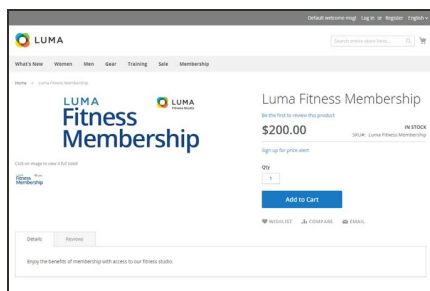
### Configurable Product

A configurable product appears to be a single product with lists of options for each variation. However, each option represents a separate, simple product with a distinct SKU, which makes it possible to track inventory for each variation.



### Grouped Product

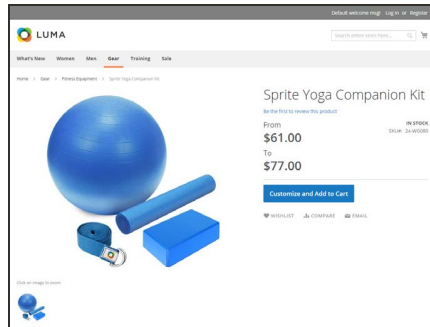
A grouped product presents multiple, standalone products as a group. You can offer variations of a single product, or group them for a promotion. The products can be purchased separately, or as a group.



### Virtual Product

Virtual products are not tangible products, and are typically used for products such as services, memberships, warranties, and subscriptions. Virtual products can be used in association with grouped and bundle products.





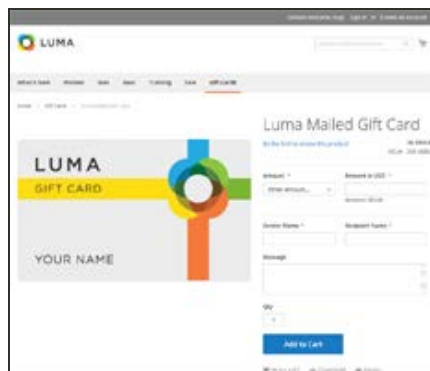
## Bundle Product

A bundle product let customers “build their own” from an assortment of options. The bundle could be a gift basket, computer, or anything else that can be customized. Each item in the bundle is a separate, standalone product.



## Downloadable Product

A digitally downloadable product that consists of one or more files that are downloaded. The files can reside on your server or be provided as URLs to any other server.



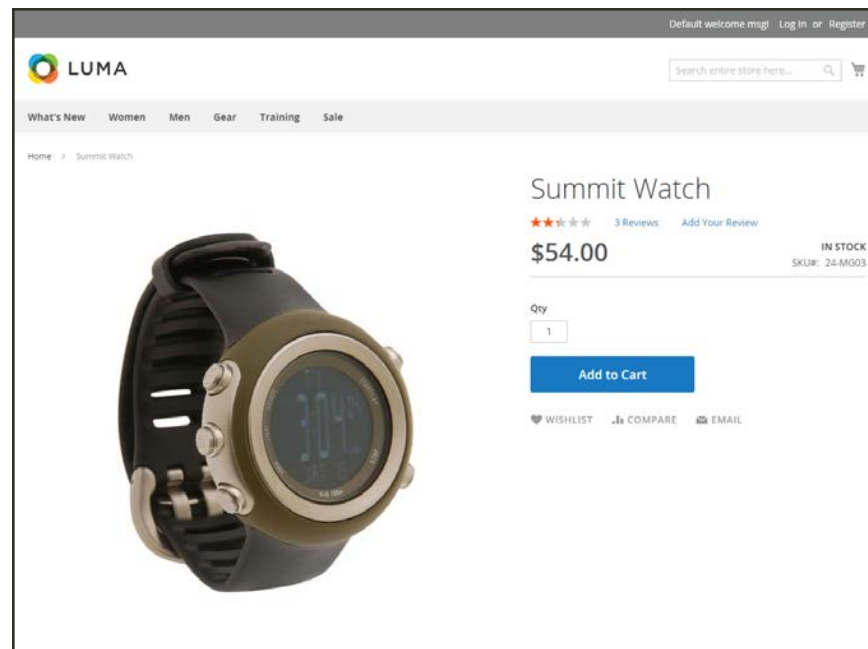
## Gift Card

There are three kinds of gift cards: virtual gift cards which are sent by email, physical gift cards which are shipped to the recipient, and combined gift cards which are a combination of the two. Each has a unique code, that is redeemed during checkout. Gift cards can also be included in a grouped product.

## Simple Product

One of the keys to harnessing the power of product types is learning when to use a simple, standalone product. A simple products can be sold individually, or as part of a grouped, configurable, or bundle product. A simple product with custom options is sometimes referred to as a composite product.

The following steps take you through the process of creating a simple product using the default product template with basic settings. When you finish the basics, you can complete the advanced settings as needed.



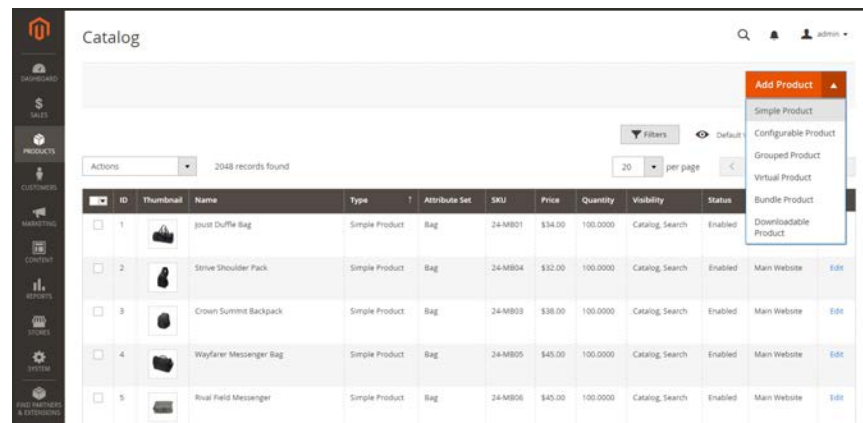
*Simple Product*

### Process Overview:

- Step 1: Choose the Product Type
- Step 2: Choose the Attribute Set
- Step 3: Complete the Required Settings
- Step 4: Complete the Basic Settings
- Step 5: Complete the Product Information
- Step 6: Publish the Product

## Step 1: Choose the Product Type

1. On the Admin sidebar, tap **Products**. Then under **Inventory**, choose **Catalog**.
2. In the upper-right corner on the **Add Product** (▼) menu, choose **Simple Product**.



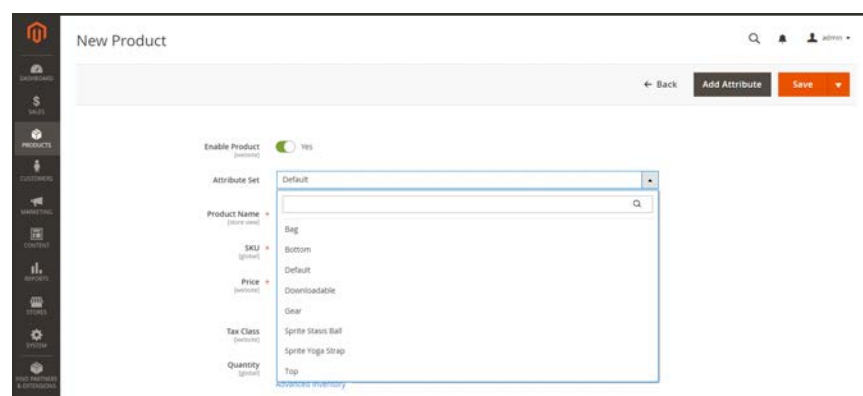
*Add Simple Product*

## Step 2: Choose the Attribute Set

To choose the **attribute set** that is used as a template for the product, do one of the following:

- In the **Search** box, enter the name of the attribute set.
- In the list, choose the attribute set that you want to use.

The form is updated to reflect the change.



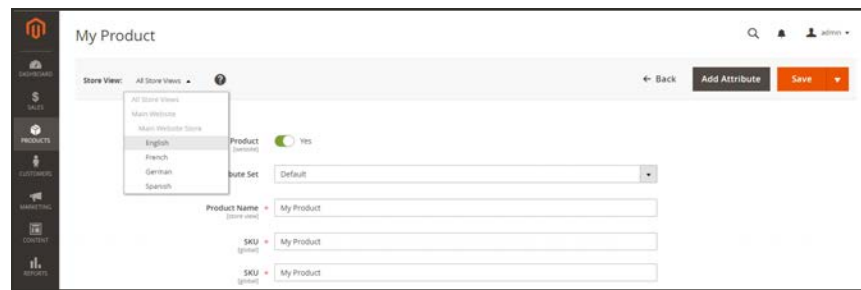
*Choose Attribute Set*

### Step 3: Complete the Required Settings

1. Enter the product **Product Name**.
2. Accept the default **SKU** that is based on the product name, or enter another.
3. Enter the product **Price**.
4. Because the product is not yet ready to publish, set the **Enable Product** switch to the “No” ( ☐ ) position.
5. Tap **Save** and continue.

When the product is saved, the **Store View** chooser appears in the upper-left corner.

6. Choose the **Store View** where the product is to be available.



*Choose Store View*

### Step 4: Complete the Basic Settings

1. Set **Tax Class** to one of the following:
  - None
  - Taxable Goods
2. Enter the **Quantity** of the product that is currently in stock.  
Take note that by default, **Stock Status** is set to “In Stock.”
3. Enter the **Weight** of the product.
4. Accept the default **Visibility** setting, “Catalog, Search.”
5. To assign **Categories** to the product, tap the **Select...** box. Then, do either of the following:

#### Choose an existing category:

- a. Start typing in the box to find a match.
- b. Mark the checkbox of each category that is to be assigned.

**Create a new category:**

- a. Tap **New Category**.
  - b. Enter the **Category Name** and choose the **Parent Category** to determine its position in the menu structure.
  - c. Tap **Create Category**.
6. To feature the product in the list of **new products**, mark the **Set Product as New** checkbox.
  7. Choose the **Country of Manufacture**.

The screenshot shows the 'New Product' form in the Magento Commerce Admin interface. The form is titled 'New Product' and has a search bar and user profile in the top right. On the left is a sidebar with navigation icons. The form fields include:

- Enable Product** (checkbox, checked)
- Attribute Set** (dropdown, Default)
- Product Name** (text input)
- SKU** (text input)
- Price** (text input, \$)
- Tax Class** (dropdown, Taxable Goods)
- Quantity** (text input)
- Stock Status** (dropdown, In Stock)
- Weight** (text input, lb)
- Categories** (dropdown, Select...)
- Visibility** (dropdown, Catalog Search)
- Set Product as New From** (checkbox)
- Country of Manufacture** (dropdown)

Buttons at the top right include 'Back', 'Add Attribute', and 'Save'. A 'New Category' button is located next to the 'Categories' dropdown.

*Product Details*

There might be additional individual attributes that describe the product. The selection varies attribute set, and you can complete them later.


**Step 5: Complete the Product Information**

Scroll down and complete the information in the following sections as needed:

- **Content**
- **Images and Videos**
- **Related Products, Up-Sells, and Cross-Sells**
- **Search Engine Optimization**
- **Customizable Options**

- **Products in Websites**
- **Design**
- **Gift Options**

## Step 6: Publish the Product

1. If you are ready to publish the product in the catalog, set the **Enable Product** switch to the “Yes” (  ) position.
2. Do one of the following:


### Method 1: Save and Preview

1. In the upper-right corner, tap **Save**.
2. To view the product in your store, choose **Customer View** on the **Admin** ▼ menu. The store opens in a new browser tab.



*Customer View*

### Method 2: Save and Close

On the **Save** (  ) menu, choose **Save & Close**.



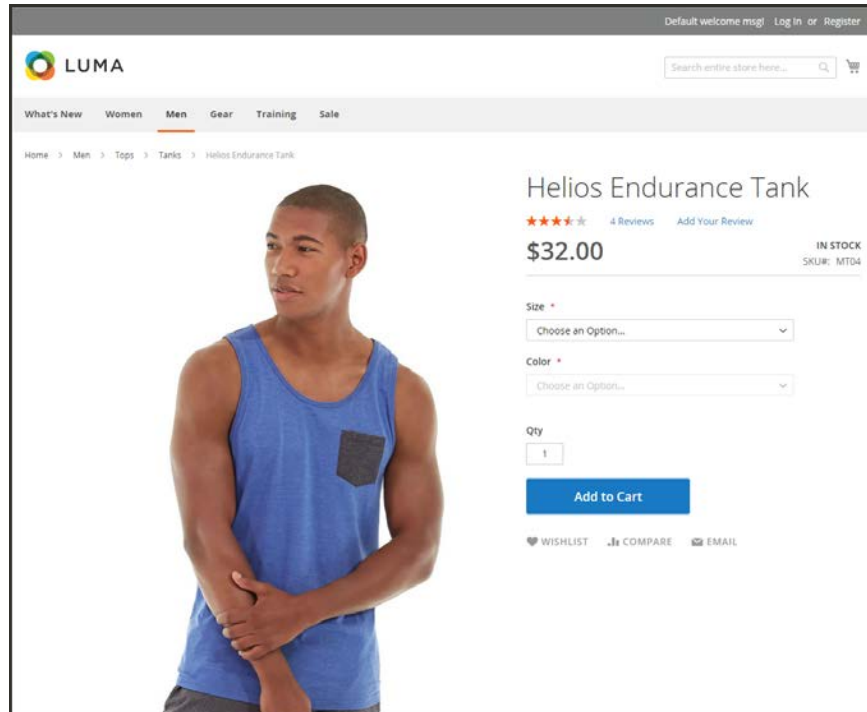
*Save & Close*

## THINGS TO REMEMBER

- ☒ Simple products can be included in configurable, bundle, and grouped product types.
- ☒ A simple product can have custom options with a variety of input controls, which makes it possible to sell many product variations from a single SKU.

## Configurable Product

A configurable product looks like a single product with drop-down lists of options for each variation. Each option is actually a separate simple product with a unique SKU, which makes it possible to track inventory for each product variation. You could achieve a similar effect by using a simple product with custom options, but without the ability to track inventory for each variation.



*Configurable Product*

# Part 1: Creating a Configurable Product

Although a configurable product uses more SKUs, and may initially take a little longer to set up, it can save you time in the long run. If you plan to grow your business, the configurable product type is a good choice for products with multiple options.

The attribute set that is used for a configurable product must include at least one dropdown or visual swatch **attribute** that meets the following requirements:

## Product Variation Attribute Requirements

PROPERTY	SETTING
Scope	Global
Catalog Input Type for Store Owner	Dropdown or Visual Swatch
Values Required	Yes

Before you begin, prepare an **attribute set** that includes a dropdown or visual swatch for each product variation. The attribute set that is used in this example has drop-down attributes for color and size.

**Process Overview:**

**Part I: Create Configurable Product**

Step 1: **Choose the Product Type**

Step 3: **Complete the Required Settings**

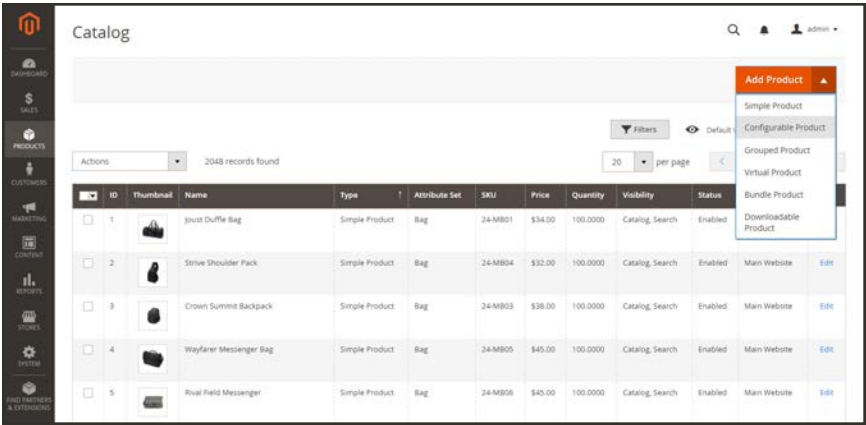
Step 4: **Complete the Basic Settings**

Step 5: **Save and Continue**

## Step 1: Choose the Product Type

- 1. On the Admin sidebar, tap **Products**. Then under Inventory, choose **Catalog**.
- 2. In the upper-right corner on the **Add Product** (▼) menu, choose **Configurable Product**.





Add Configurable Product

## Step 2: Choose the Attribute Set

The **attribute set** determines the selection of fields that are used in the product. The attribute set is indicated at the top of the page, and is initially set to “Default”.


1. To choose the attribute set for the product, click the field at the top of the page and do one of the following:
  - In the **Search** box, enter the name of the attribute set.
  - In the list, choose the attribute set that you want to use.

The form is updated to reflect the change.

2. If you need to add an additional attribute to the attribute set, tap **Add Attribute**. Then, follow the instruction in [Adding an Attribute](#).

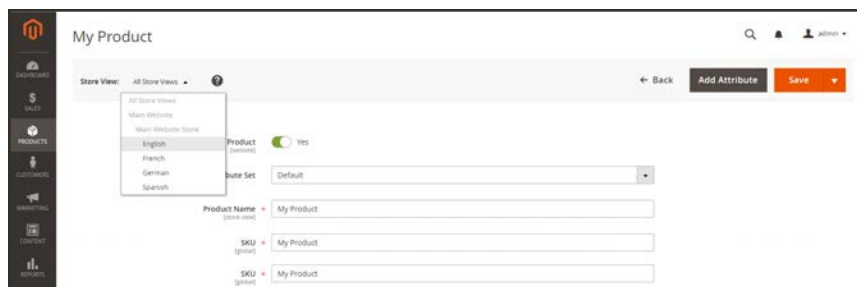
*Choose Template*

## Step 3: Complete the Required Settings

1. Enter the product **Product Name**.
2. Accept the default **SKU** that is based on the product name, or enter another.
3. Enter the product **Price**.
4. Because the product is not yet ready to publish, set the **Enable Product** switch to the “No” (  ) position.
5. Tap **Save** and continue.

When the product is saved, the **Store View** chooser appears in the upper-left corner.

6. Choose the **Store View** where the product is to be available.



*Choose Store View*

## Step 4: Complete the Basic Settings

1. Set **Tax Class** to one of the following:
  - None
  - Taxable Goods
2. The **Quantity** is determined by the product variations, so you can leave it blank for now.  
 The Stock Status of a configurable product is determined by each associated configuration. Because the product was saved without entering a quantity, the Stock Status is now set to “Out of Stock.”
  - a. Enter the product **Weight**.
  - b. Accept the default **Visibility** setting, “Catalog, Search.”
3. To feature the product in the list of **new products**, mark the **Set Product as New** checkbox.
4. To assign **Categories** to the product, tap the **Select...** box. Then, do either of the following:

### Choose an existing category:

- a. Start typing in the box to find a match.
- b. Mark the checkbox of the category that is to be assigned.

### Create a new category:

- a. Tap **New Category**.
  - b. Enter the **Category Name** and choose the **Parent Category** to determine its position in the menu structure.
  - c. Tap **Create Category**.
5. To feature the product in the list of **new products**, mark the **Set Product as New** checkbox.
  6. Choose the **Country of Manufacture**.

The screenshot shows the 'My Product' configuration interface. At the top, there's a 'Store View' dropdown set to 'All Store Views'. A yellow notification banner states 'You saved the product.' Below this, the 'Enable Product' toggle is set to 'No'. The 'Attribute Set' is 'Top'. The 'Product Name' and 'SKU' are both 'My Product'. The 'Price' is '\$ 39.00'. The 'Tax Class' is 'Taxable Goods'. The 'Quantity' is empty. The 'Stock Status' is 'Out of Stock'. The 'Weight' is empty. The 'Categories' dropdown is set to 'Select...'. The 'Visibility' is 'Catalog Search'. At the bottom, there are fields for 'Set Product as New From' and 'Country of Manufacture'. Navigation buttons 'Back', 'Add Attribute', and 'Save' are in the top right.

Product Details

There might be additional attributes that are used to describe the product. The selection varies attribute set, and you can complete them later.

Step 5: Save and Continue

This is a good time to save your work. In the upper-right corner, tap **Save**. In the next step, you'll set up the configurations for each variation of the product.

Part 2: Adding Configurations

The following example shows how to add configurations for three colors and three sizes. In all, nine simple products will be created with unique SKUs to cover every possible combination of variations. By default, the product name and SKU for each variation is based on the parent product name or SKU, plus the attribute value.

The progress bar at the top of the page shows where you are in the process, and guides you through each step.

The screenshot shows a 'Create Product Configurations' dialog box. It contains a progress bar with four steps: 'Select Attributes', 'Attribute Values', 'Bulk Images & Price', and 'Summary'. The 'Attribute Values' step is currently selected and highlighted. Below the progress bar, there are 'Cancel', 'Back', and 'Next' buttons. A yellow banner at the top of the dialog box contains a note: 'When you remove or add an attribute, we automatically update all configurations and you will need to recreate current configurations manually.'

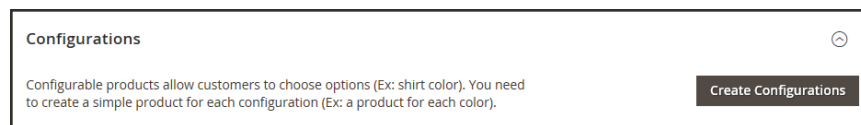
Progress Bar

Process Overview: Part II: Add Configurations

- Step 1: **Choose the Attributes**  
 Step 2: **Enter the Attribute Values**  
 Step 3: **Configure the Images, Price, and Quantity**  
 Step 4: **Generate the Product Configurations**  
 Step 5: **Add a Product Image**  
 Step 6: **Publish the Products**  
 Step 7: **Configure the Cart Thumbnails** (Optional)

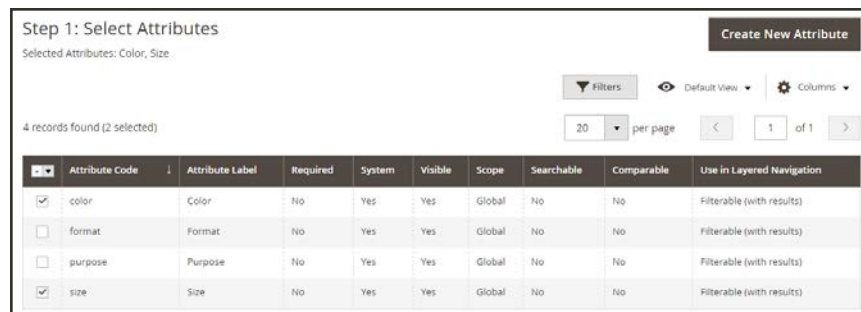
## Step 1: Choose the Attributes

- Continuing from Part I, scroll down to the **Configurations** section. Then, tap **Create Configurations**.



### Configurations

- Mark the checkbox of each attribute that you want to include as a configuration. For this example, we choose color and size.
- The list includes all attributes from the attribute set that can be used in a configurable product.



### Select Attributes

- If you need to add a new attribute, **Create New Attribute**. Complete the attribute properties, and tap **Save Attribute**. Then, mark the checkbox to select the attribute.
- In the upper-right corner, tap **Next**.

## Step 2: Enter the Attribute Values

1. For each attribute, mark the checkbox of the values that apply to the product.

### Step 2: Attribute Values

Select values from each attribute to include in this product. Each unique combination of values creates a unique product SKU.

Color (15 Options)


Select All Deselect All

<input type="checkbox"/> Black	<input type="checkbox"/> Blue	<input type="checkbox"/> Brown
<input type="checkbox"/> Gray	<input type="checkbox"/> Green	<input type="checkbox"/> Lavender
<input type="checkbox"/> Multi	<input type="checkbox"/> Orange	<input type="checkbox"/> Purple
<input type="checkbox"/> Red	<input type="checkbox"/> White	<input type="checkbox"/> Yellow
<input checked="" type="checkbox"/> Amethyst	<input checked="" type="checkbox"/> Beryl	<input checked="" type="checkbox"/> Teal

Size (20 Options)

Select All Deselect All

<input type="checkbox"/> 55 cm	<input type="checkbox"/> XS	<input type="checkbox"/> 65 cm
<input checked="" type="checkbox"/> S	<input type="checkbox"/> 75 cm	<input checked="" type="checkbox"/> M
<input type="checkbox"/> 6 foot	<input checked="" type="checkbox"/> L	<input type="checkbox"/> 8 foot
<input type="checkbox"/> XL	<input type="checkbox"/> 10 foot	<input type="checkbox"/> 28
<input type="checkbox"/> 29	<input type="checkbox"/> 30	<input type="checkbox"/> 31
<input type="checkbox"/> 32	<input type="checkbox"/> 33	<input type="checkbox"/> 34
<input type="checkbox"/> 36	<input type="checkbox"/> 38	

2. To rearrange the attributes, grab the Change Order (  ) icon and move the section to a new position. The order determines the position of the drop-down lists on the product page.
3. In the progress bar, **Next**.

### Step 3: Configure the Images, Price, and Quantity

This step determines the images, pricing and quantity of each configuration. The available options are the same for each, and you can choose only one. You can apply the same setting to all SKUs, apply a unique setting to each SKU, or skip the settings for now.

1. Choose the configuration options that apply.

#### Configure the Images

##### Method 1: Apply a Single Set of Images to All SKUs

1. Select **Apply single set of images to all SKUs**.
2. Browse to each image that you want to include in the product gallery, or drag them to the box.



*Use Same Images for All SKUs*

##### Method 2: Apply Unique Images for Each SKU

Because we already uploaded an image for the parent product, we'll use this option to upload an image of each color. This is the image that will appear in the shopping cart when someone buys the shirt in a specific color.

1. Select **Apply unique images by attribute to each SKU**.
2. Select the **attribute** that the images illustrate. For example: color.
3. For each attribute value, either browse to the images that you want to use for that configuration, or drag them to the box.

If you drag the an image to a value box, it appears in the sections for the other values, as well. If you want to delete an image, tap the trashcan (🗑️) icon.

*Unique Images per SKU*

## Configure the Prices

### Method 1: Apply the Same Price to All SKUs

1. If the price is the same for all variations of the product, select **Apply single price to all SKUs**.
2. Enter the **Price**.

*Same Price per SKU*

### Method 2: Apply a Different Price for Each SKU

1. If the price differs for each or for some variations of the product, select **Apply unique prices by attribute to each SKU**.
2. Select the **attribute** that is the basis of the price difference.
3. Enter the **price** for each attribute value. In this example, the XL size costs more.



The screenshot shows the 'Price' configuration section. It has three radio buttons: 'Apply single price to all SKUs' (unselected), 'Apply unique prices by attribute to each SKU' (selected), and 'Skip price at this time' (unselected). Below these is a 'Select attribute' dropdown menu with 'Size' selected. Underneath, there are four input fields for different sizes: 'S' with a value of '\$ 32', 'M' with '\$ 32', 'L' with '\$ 32', and 'XL' with '\$ 34'.

*Unique Price per SKU*

## Configure the Quantity

### Method 1: Apply the Same Quantity to All SKUs

1. If the quantity is the same for all SKUs, select **Apply single quantity to each SKU**.
2. Enter the **Quantity**.

The screenshot shows the 'Quantity' configuration section. It has three radio buttons: 'Apply single quantity to each SKUs' (selected), 'Apply unique quantity by attribute to each SKU' (unselected), and 'Skip quantity at this time' (unselected). Below these is a 'Quantity' input field with the value '100'.

*Same Quantity for All SKUs*

### Method 2: Apply Different Quantity by Attribute

1. If the quantity is the different for each SKU, select **Apply unique quantity by attribute to each SKU**.
2. Enter the **Quantity** for each.

The screenshot shows the 'Quantity' configuration section. It has three radio buttons: 'Apply single quantity to each SKUs' (unselected), 'Apply unique quantity by attribute to each SKU' (selected), and 'Skip quantity at this time' (unselected). Below these is a 'Select attribute' dropdown menu with 'Size' selected. Underneath, there are four input fields for different sizes: 'S' with a value of '150', 'M' with '150', 'L' with '200', and 'XL' with '100'.

*Different Quantities per Attribute*

- 2. When complete, tap **Next** in the upper-right corner.




**Step 4: Generate the Product Configurations**

- 1. Wait a moment for the list of products to appear.
- 2. Do one of the following:
  - If you are satisfied with the configurations, tap **Next**.
  - To make corrections, tap **Back**.

Step 4: Summary

New Product Review

Here are the products you're about to create.

Images	SKU	Quantity	Color	Size	Price
	Jewel Tone Tee-Amethyst-S	100	Amethyst	S	\$ 39.99
	Jewel Tone Tee-Amethyst-M	100	Amethyst	M	\$ 39.99
	Jewel Tone Tee-Amethyst-L	100	Amethyst	L	\$ 39.99




Summary

The current product variations appear at the bottom of the Configuration section.

Step 4: Summary


New Product Review

Here are the products you're about to create.

Images	SKU	Quantity	Color	Size	Price
	Jewel Tone Tee-Amethyst-S	100	Amethyst	S	\$ 39.99
	Jewel Tone Tee-Amethyst-M	100	Amethyst	M	\$ 39.99
	Jewel Tone Tee-Amethyst-L	100	Amethyst	L	\$ 39.99

Current Configurations

**Step 5: Add a Product Image**

- 1. Scroll down to the **Images and Videos** section. Then, expand  the section.
- 2. Click the **Camera** tile, and browse to the main image that you want to use for the configurable product.


To learn more, see: [Images and Videos](#).

## Step 6: Complete the Product Information

Scroll down and complete the information in the following sections as needed:

- [Content](#)
- [Related Products, Up-Sells, and Cross-Sells](#)
- [Search Engine Optimization](#)
- [Customizable Options](#)
- [Products in Websites](#)
- [Design](#)
- [Gift Options](#)

## Step 7: Publish the Product

1. If you are ready to publish the product in the catalog, set the **Enable Product** switch to the “Yes” (  ) position.
2. Do one of the following:

### Method 1: Save and Preview

1. In the upper-right corner, tap **Save**.
2. To view the product in your store, choose **Customer View** on the **Admin** ( ▼ ) menu. The store opens in a new browser tab.



*Customer View*

### Method 2: Save and Close

On the **Save** (  ) menu, choose **Save & Close**.

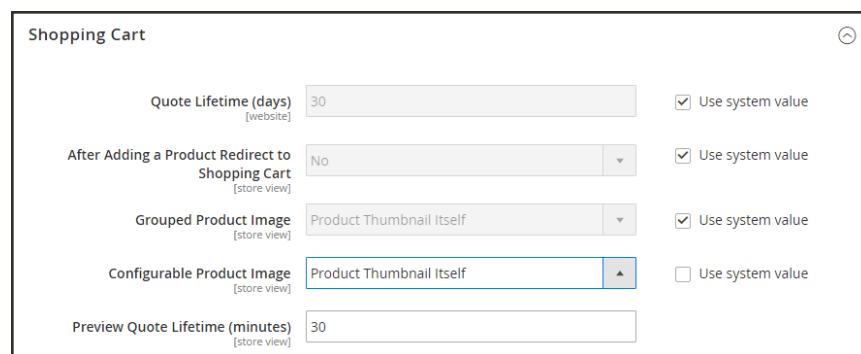


*Save & Close*

### Step 8: Configure the Cart Thumbnails (Optional)

If you have a different image for each variation you can set the configuration to use the correct image for the shopping cart thumbnail.

1. On the Admin sidebar, tap **Stores**. Then under Settings, choose **Configuration**.
2. In the panel on the left under Sales, choose **Checkout**. Then, expand ☏ the **Shopping Cart** section.
3. Set **Configurable Product Image** to “Product Thumbnail Itself.”
4. When complete, tap **Save Config**.



*Shopping Cart - Configurable Product Image*

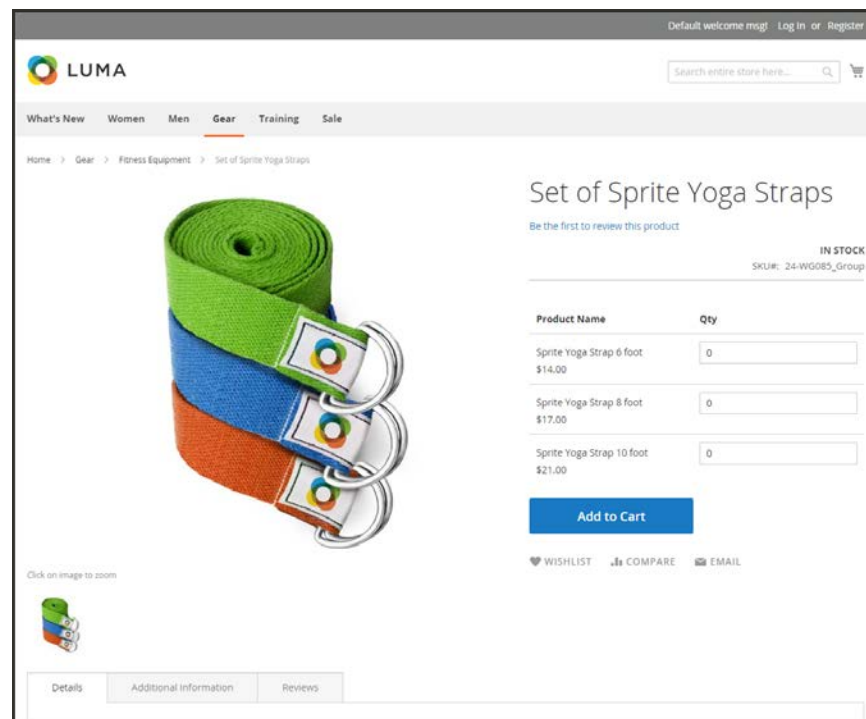
### THINGS TO REMEMBER

- ☑ A configurable product allows the shopper to choose options from drop-down list and visual swatch input types. Each option is actually a separate, simple product.
- ☑ The attributes that are used for product variations must have a global scope and the customer must be required to choose a value. The product variation attributes must be included in the attribute set that is used as a template for the configurable product.

- ☒ The attribute set that is used as a template for a configurable product must include the attribute(s) that contain the values that are needed for each product variation.
- ☒ The thumbnail image in the shopping cart can be set to display the image from the configurable product record, or from the product variation.

## Grouped Product

A grouped product is made up of simple standalone products that are presented as a group. You can offer variations of a single product, or group them by season or theme to create a set of different products. Each product can be purchased separately, or as part of the group. In the shopping cart, each item is listed separately.



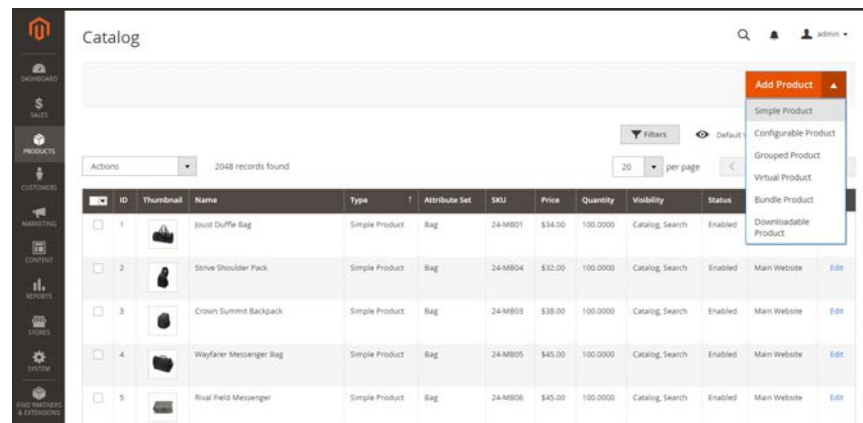
*Grouped Product*

### Process Overview:

- Step 1: Choose the Product Type
- Step 2: Choose the Attribute Set
- Step 3: Complete the Required Settings
- Step 4: Complete the Basic Settings
- Step 5: Add Products to the Group
- Step 6: Publish the Product
- Step 7: Configure the Cart Thumbnails (Optional)

## Step 1: Choose the Product Type

1. On the Admin sidebar, tap **Products**. Then under **Inventory**, choose **Catalog**.
2. In the upper-right corner on the **Add Product** (▼) menu, choose **Simple Product**.



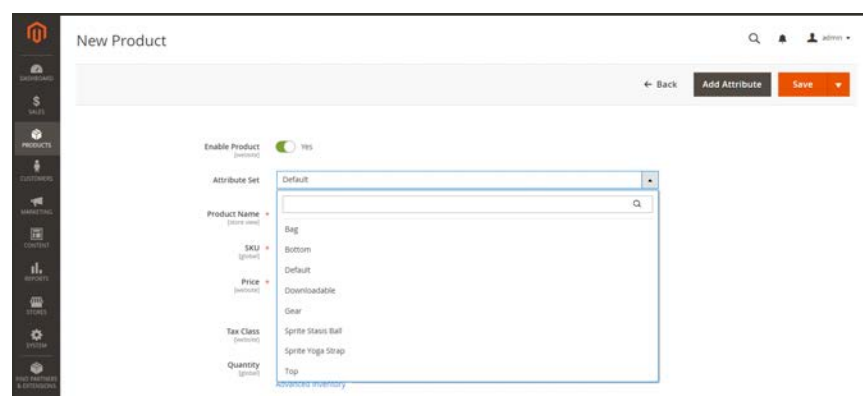
*Add Simple Product*

## Step 2: Choose the Attribute Set

To choose the **attribute set** that is used as a template for the product, do one of the following:

- In the **Search** box, enter the name of the attribute set.
- In the list, choose the attribute set that you want to use.

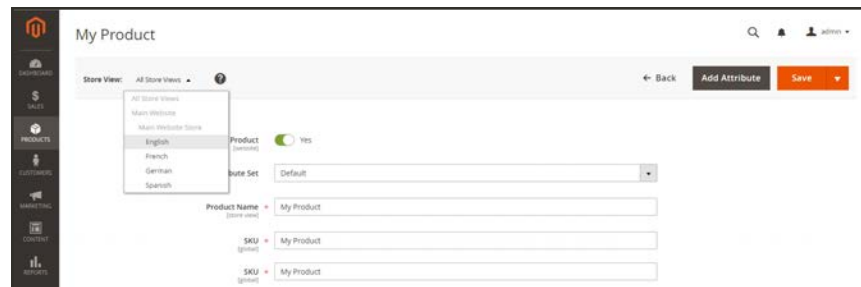
The form is updated to reflect the change.



*Choose Template*

### Step 3: Complete the Required Settings

1. Enter the product **Product Name**.
2. Accept the default **SKU** that is based on the product name, or enter another.  
Take note that the **Quantity** field is not available because the value is derived from the individual products that make up the group.
3. Because the product is not yet ready to publish, set the **Enable Product** switch to the “No” ( ☐ ) position.
4. Tap **Save** and continue.  
When the product is saved, the **Store View** chooser appears in the upper-left corner.
5. Choose the **Store View** where the product is to be available.



*Choose Store View*

### Step 4: Complete the Basic Settings

1. Accept the **Stock Status** setting, “In Stock.”
2. To assign **Categories** to the product, tap the **Select...** box. Then, do either of the following:

#### Choose an existing category:

- a. Start typing in the box to find a match.
- b. Mark the checkbox of the category that is to be assigned.

#### Create a new category:

- a. Tap **New Category**.
  - b. Enter the **Category Name** and choose the **Parent Category** to determine its position in the menu structure.
  - c. Tap **Create Category**.
3. Accept the **Visibility** settings, “Catalog, Search.”



4. To feature the product in the list of **new products**, choose the **Set Product as New From** and **To** dates on the calendar.
5. Choose the **Country of Manufacture**.

There might be additional individual attributes that describe the product. The selection varies attribute set, and you can complete them later.

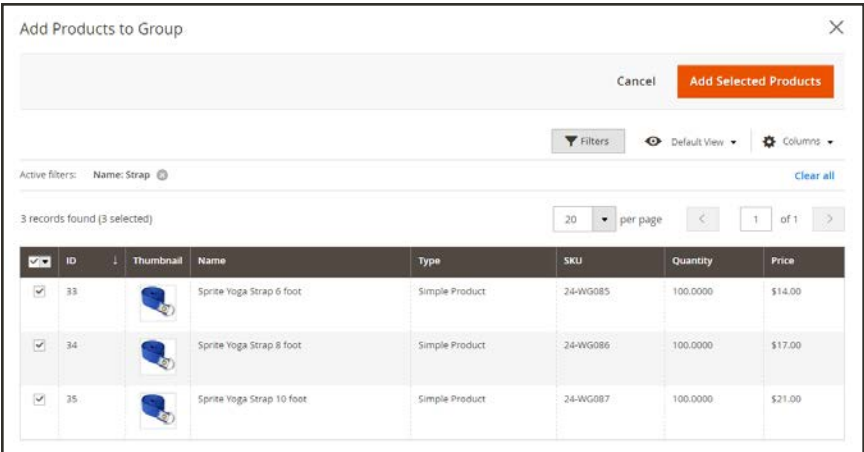
*Grouped Product Details*

### Step 5: Add Products to the Group

1. Scroll down to the **Grouped Products** section. Then, tap **Add Products to Group**.

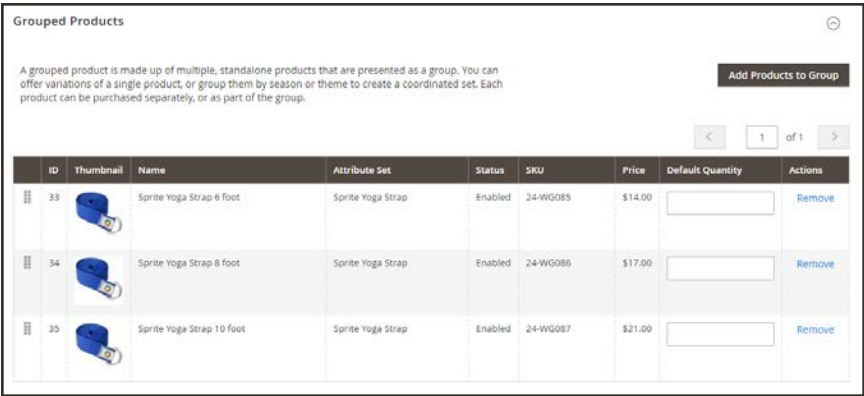
*Grouped Products*

2. If necessary, use the **filters** to find the products that you want to include in the group.
3. In the list, mark the checkbox of each item that you want to include in the group.




Add Selected Products

4. Tap **Add Selected Products** to add them to the group.
- The selected products appear in the Grouped Products section.



Products in Group


5. Then, do any of the following:
- Enter a **Default Quantity** for any of the items.
  - To change the order of the products, grab the **Change Order** icon () in the first column, and drag the product to the new position in the list.
  - To remove a product from the group, click **Remove**.

## Step 5: Complete the Product Information


Complete the information in the following sections as needed:

- **Content**
- **Images and Videos**
- **Search Engine Optimization**
- **Related Products, Up-Sells, and Cross-Sells**
- **Customizable Options**
- **Products in Websites**
- **Design**
- **Gift Options**

## Step 6: Publish the Product

1. If you are ready to publish the product in the catalog, set the **Enable Product** switch to the “Yes” (  ) position.
2. Do one of the following:

### Method 1: Save and Preview

1. In the upper-right corner, tap **Save**.
2. To view the product in your store, choose **Customer View** on the **Admin** (  ) menu. The store opens in a new browser tab.



*Customer View*

### Method 2: Save and Close


On the **Save** (  ) menu, choose **Save & Close**.

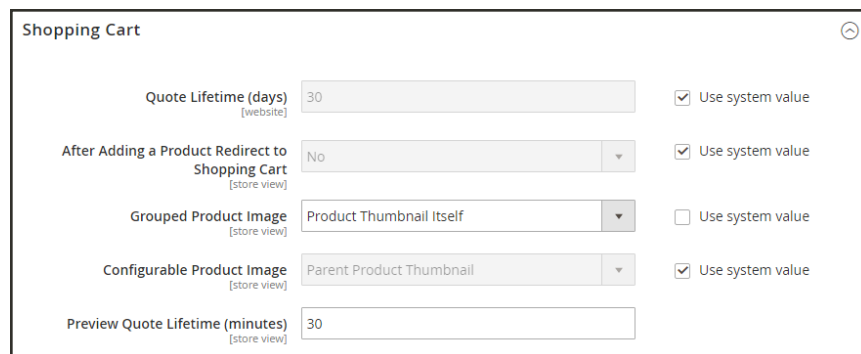


*Save & Close*

## Step 7: Configure the Cart Thumbnails (Optional)

If you have a different image for each product in the group, you can set the configuration to use the correct image for the shopping cart thumbnail.

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Checkout**.
3. Expand  the **Shopping Cart** section. Then, do the following:
  - a. If necessary, clear the Use system value checkbox.
  - b. Set **Grouped Product Image** to “Product Thumbnail Itself.”
4. Tap **Save Config**.



**Shopping Cart**

Quote Lifetime (days) [website] 30 ☒ Use system value

After Adding a Product Redirect to Shopping Cart [store view] No ☒ Use system value

Grouped Product Image [store view] Product Thumbnail Itself ☐ Use system value

Configurable Product Image [store view] Parent Product Thumbnail ☒ Use system value

Preview Quote Lifetime (minutes) [store view] 30

### *Shopping Cart*

## THINGS TO REMEMBER

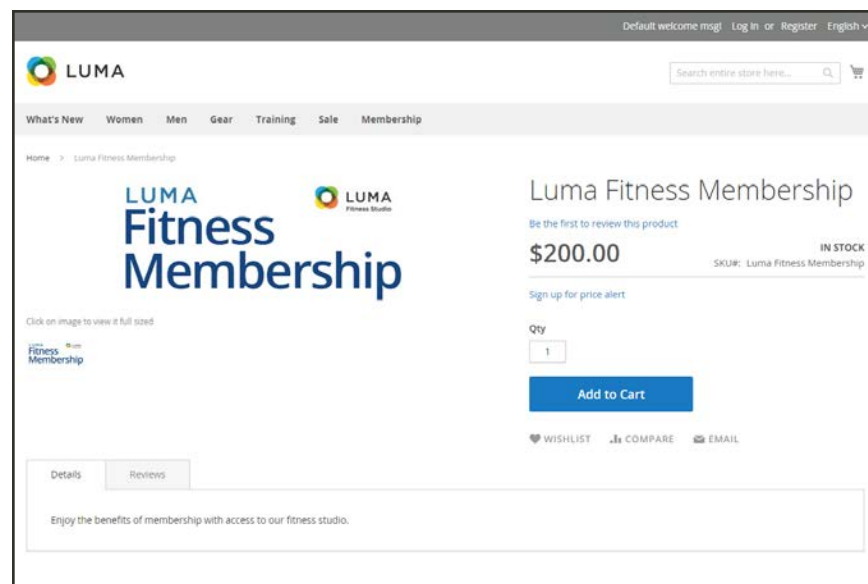
- ☒ A grouped product is essentially a collection of simple associated products.
- ☒ Simple and virtual products that are part of a grouped product cannot have custom options.
- ☒ Each item purchased appears individually in the shopping cart, rather than as part of the group.
- ☒ The thumbnail image in the shopping cart can be set to display the image from the grouped parent product, or associated product.

## Virtual Product

Virtual products are used to represent non-tangible items such as memberships, services, warranties, or subscriptions. Virtual products can be sold individually, or included as part of the following product types:

- **Grouped Product**
- **Bundle Product**

Aside from the absence of the Weight field, the process of creating a virtual product and a simple product is the same.



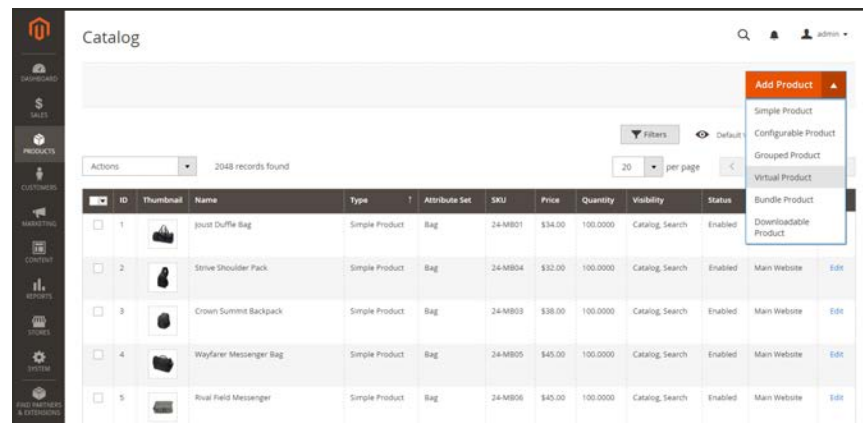
*Virtual Product*

### Process Overview:

- Step 1: **Choose the Product Type**
- Step 2: **Choose the Attribute Set**
- Step 3: **Complete the Required Settings**
- Step 4: **Complete the Basic Settings**
- Step 5: **Complete the Product Information**
- Step 6: **Publish the Product**

## Step 1: Choose the Product Type

1. On the Admin sidebar, tap **Products**. Then under Inventory, choose **Catalog**.
2. In the upper-right corner on the **Add Product** (▼) menu, choose **Virtual Product**.



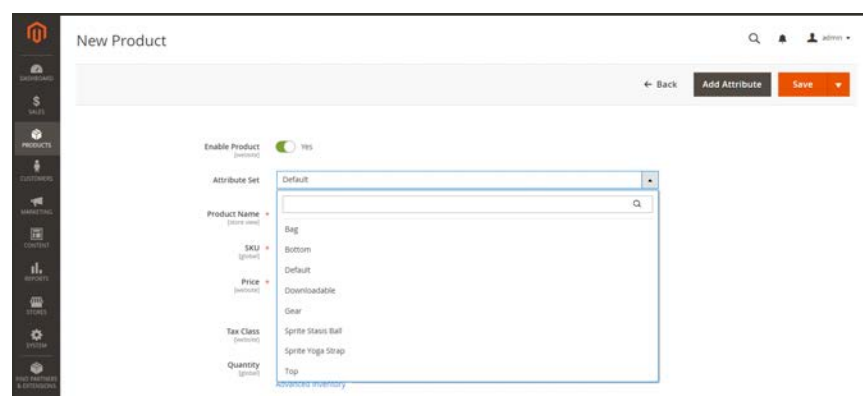
*Add Virtual Product*

## Step 2: Choose the Attribute Set

To choose the **attribute set** that is used as a template for the product, do one of the following:

- In the **Search** box, enter the name of the attribute set.
- In the list, choose the attribute set that you want to use.

The form is updated to reflect the change.



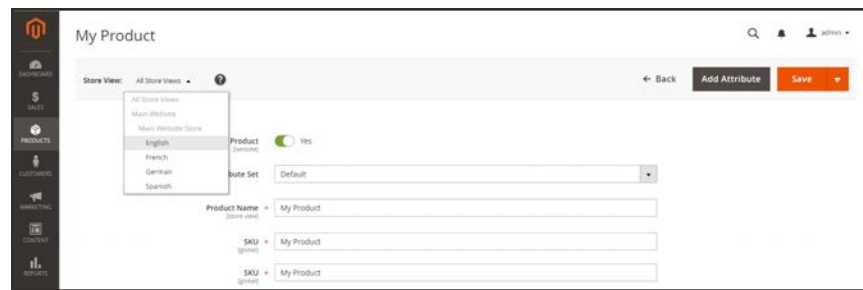
*Choose Attribute Set*

### Step 3: Complete the Required Settings

1. Enter the product **Product Name**.
2. Accept the default **SKU** that is based on the product name, or enter another.
3. Enter the product **Price**.
4. Because the product is not yet ready to publish, set the **Enable Product** switch to the “No” ( ☐ ) position.
5. Tap **Save** and continue.

When the product is saved, the **Store View** chooser appears in the upper-left corner.

6. Choose the **Store View** where the product is to be available.



*Choose Store View*

### Step 4: Complete the Basic Settings

1. Set **Tax Class** to one of the following:
  - None
  - Taxable Goods
2. Enter the **Quantity** of the product that is currently in stock. Then, do the following:
  - a. Accept the default **Stock Status** setting, “In Stock.”  
Note that the **Weight** field is not used, because a virtual product is not shipped.
  - b. Accept the default **Visibility** setting, “Catalog, Search.”
3. To assign **Categories** to the product, tap the **Select...** box. Then, do either of the following:

#### Choose an existing category:

- a. Start typing in the box to find a match.
- b. Mark the checkbox of the category that is to be assigned.



**Create a new category:**

- a. Tap **New Category**.
- b. Enter the **Category Name** and choose the **Parent Category** to determine its position in the menu structure.
- c. Tap **Create Category**.


There might be additional individual attributes that describe the product. The selection varies attribute set, and you can complete them later.

**Step 5: Complete the Product Information**

Complete the information in the following sections as needed:

- **Content**
- **Images and Videos**
- **Search Engine Optimization**
- **Related Products, Up-Sells, and Cross-Sells**
- **Customizable Options**
- **Products in Websites**
- **Design**
- **Gift Options**

**Step 6: Publish the Product**

1. If you are ready to publish the product in the catalog, set the **Enable Product** switch to the “Yes” (  ) position.
2. Do one of the following:

**Method 1: Save and Preview**

1. In the upper-right corner, tap **Save**.
2. To view the product in your store, choose **Customer View** on the **Admin** ( ▼ ) menu. The store opens in a new browser tab.



*Customer View*

**Method 2: Save and Close**

On the **Save** (▼) menu, choose **Save & Close**.



*Save & Close*

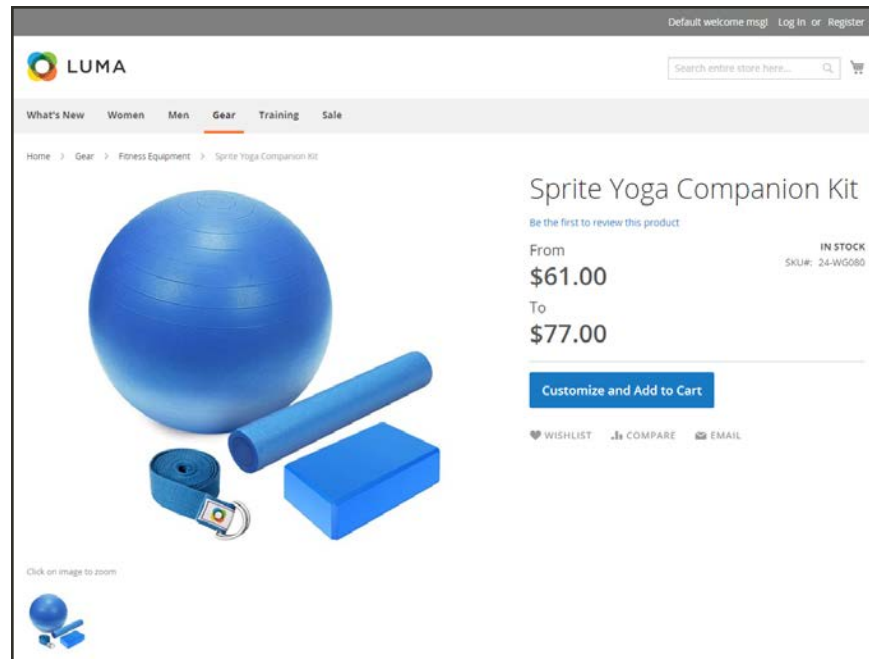
**THINGS TO REMEMBER**

- ✓ Virtual products are used for non-tangible products such as services, subscriptions, and warranties.
- ✓ Virtual products are much like simple products, but without weight.
- ✓ Shipping Options do not appear during checkout unless there is a tangible product in the cart.

## Bundle Product

A bundle is a “build your own,” customizable product. Each item in a bundle can be based on one of the following product types:

- Simple Product
- Virtual Product



*Bundle Product*

## Customizing the Bundle

The selection of options appears when the customer taps either the Customize and Add to Cart button. Because the products that are included in the bundle vary, the SKU, Price, and Weight can be set to either a dynamic or fixed value.

Minimum Advertised Price (MAP) is not available for Bundle products with dynamic pricing.

Customize Sprite Yoga Companion Kit

[Go back to product details](#)

**Sprite Stasis Ball \***

- \* Sprite Stasis Ball 55 cm + \$23.00
- Sprite Stasis Ball 65 cm + \$27.00
- Sprite Stasis Ball 75 cm + \$32.00

Qty:

**Sprite Foam Yoga Brick \***

Sprite Foam Yoga Brick + \$5.00

Qty:

**Sprite Yoga Strap \***

- \* Sprite Yoga Strap 6 foot + \$14.00
- Sprite Yoga Strap 8 foot + \$17.00
- Sprite Yoga Strap 10 foot + \$21.00

Qty:

**Your Customization**

Qty:

**Add to Cart**

**\$61.00**

[WISHLIST](#) [COMPARE](#)

**Summary**

**Sprite Stasis Ball:**  
1 x Sprite Stasis Ball 55 cm

**Sprite Foam Yoga Brick:**  
1 x Sprite Foam Yoga Brick

**Sprite Yoga Strap:**  
1 x Sprite Yoga Strap 6 foot

**Sprite Foam Roller:**  
1 x Sprite Foam Roller

### Customize Bundle

The following instructions walk you through the process of creating a bundle product with the basic settings. Each required field is marked with a red asterisk (\*). After you complete the required settings and save the product, you can complete the remaining information as needed.

#### Process Overview:

Step 1: Choose the Product Type

Step 2: Choose the Attribute Set

Step 3: Complete the Required Settings

Step 4: Complete the Basic Settings

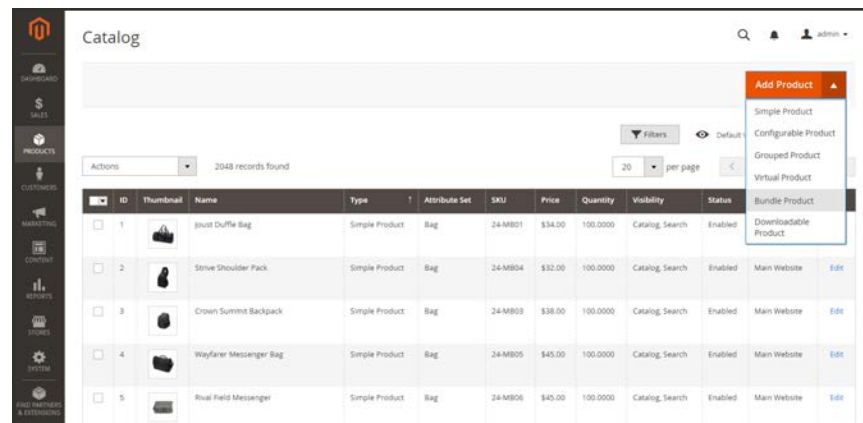
Step 5: Add the Bundle Items

Step 6: Complete the Product Information

Step 7: Publish the Product

## Step 1: Choose the Product Type

1. On the Admin sidebar, tap **Products**. Then under Inventory, choose **Catalog**.
2. In the upper-right corner on the **Add Product** (▼) menu, choose **Bundle Product**.



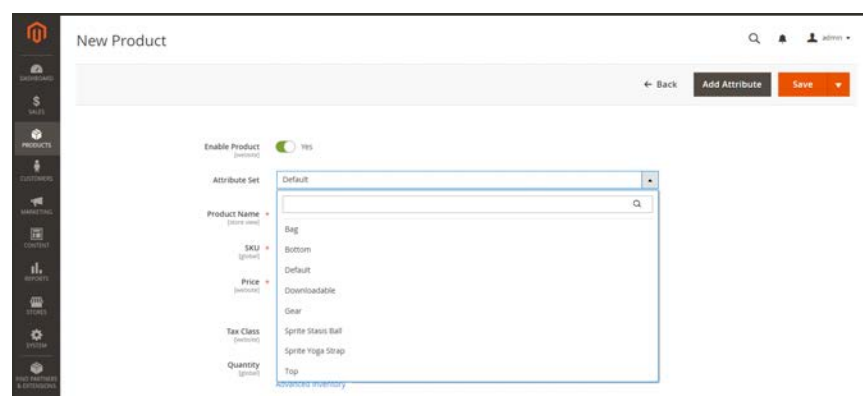
*Add Bundle Product*

## Step 2: Choose the Attribute Set

To choose the **attribute set** that is used as a template for the product, do one of the following:

- In the **Search** box, enter the name of the attribute set,
- In the list, choose the attribute set that you want to use.

The form is updated to reflect the change.



*Choose Template*

### Step 3: Complete the Required Settings

1. Enter the product **Product Name**.
2. You can either accept the default **SKU** that is based on the product name, or enter a different value. To determine the type of SKU that is assigned to each bundle item, do the following:
  - A **Dynamic SKU** can be assigned automatically to each bundle item by adding a suffix to the default SKU. By default, Dynamic SKU is set to “Yes.”
  - If you prefer to assign a unique SKU for each bundle item, set **Dynamic SKU** to the “No” ( ☐ ) position.

 A screenshot of the 'Dynamic SKU and Price' settings in the Magento product configuration interface. It shows two toggle switches, both set to 'Yes'. The first is 'Dynamic SKU (global)' and the second is 'Dynamic Price (global)'. Below the first toggle is a 'Price' field with a '\$' symbol and a text input box. A link for 'Advanced Pricing' is visible between the two sections.

*Dynamic SKU and Price*

3. To determine the price of the bundle, do one of the following:
  - A **Dynamic Price** changes to reflect the options chosen by the customer. By default, Dynamic Price is set to “Yes,” and the Price field is left blank.
  - To charge a fixed price for the bundle, set **Dynamic Price** to the “No.” ( ☐ ) position. Then, enter the **Price** that you want to charge for the bundle.
4. Because the product is not yet ready to publish, set the **Enable Product** switch to the “No” ( ☐ ) position.
5. Tap **Save** and continue.

When the product is saved, the **Store View** chooser appears in the upper-left corner.

6. Choose the **Store View** where the product is to be available.

 A screenshot of the 'My Product' configuration page in Magento. The 'Store View' dropdown menu is open, showing options: 'All Store Views', 'Main Website', 'English', 'French', 'German', and 'Spanish'. The 'Product' toggle is set to 'Yes'. The 'Price Set' is set to 'Default'. The 'Product Name' field contains 'My Product'. Below it, the 'SKU' field also contains 'My Product'. At the top right, there are buttons for 'Back', 'Add Attribute', and 'Save'.

*Choose Store View*

## Step 4: Complete the Basic Settings

1. If the bundle has Fixed Pricing, set **Tax Class** to one of the following:

- None
- Taxable Goods

If the bundle has Dynamic Pricing, the tax is determined for each bundle item.

2. Take note of the following:

- The **Quantity** is not available because the value is determined for each bundle item.
- The **Stock Status** is set by default to “In Stock.”

3. To determine the weight of the bundle, do one of the following:

- A **Dynamic Weight** changes to reflect the options chosen by the customer. By default, Dynamic Weight is set to “Yes,” and the Weight field is left blank.
- To assign a fixed weight to the bundle, set **Dynamic Weight** to the “No.” ( ☐ ) position. Then, enter the **Weight** of the bundle.



*Dynamic Weight*

4. To feature the product in the list of **new products**, mark the **Set Product as New** checkbox.
5. Accept the default **Visibility** setting, “Catalog, Search.”
6. To assign **Categories** to the product, tap the **Select...** box. Then, do either of the following:

### Choose an existing category:

- a. Start typing in the box to find a match.
- b. Mark the checkbox of each category that is to be assigned.

### Create a new category:

- a. Tap **New Category**.
- b. Enter the **Category Name** and choose the **Parent Category** to determine its position in the menu structure.
- c. Tap **Create Category**.

7. Choose the **Country of Manufacture**.

### Bundle Details

There might be additional attributes that describe the product. The selection varies attribute set, and you can complete them later.

## Step 5: Add the Bundle Items

1. Scroll down to the Bundle Items section. Then, set **Ship Bundle Items** to one of the following:
  - Separately
  - Together

### Bundle Items

2. Tap **Add Option**, Then, do the following:



### Add Bundle Options

- a. Enter an **Option Title** to be used field label.
- b. Set **Input Type** to one of the following:
  - Drop-down
  - Radio buttons
  - Checkbox (See **Note.**)
  - Multiple Select (See **Note.**)
- c. To make the field a required entry, mark the **Required** checkbox.
- d. Tap **Add Products to Option**. Then, mark the checkbox of each product that you want to include in this option. If there are many products, use the **list filters** and **pagination controls** to find the products you need.
- e. Tap **Add Selected Products**.

ID	Thumbnail	Name	Type	SKU	Quantity	Price
<input type="checkbox"/> 24		Sprite Stasis Ball 55 cm	Simple Product	24-WQ081-grey	100.0000	\$23.00
<input type="checkbox"/> 25		Sprite Stasis Ball 55 cm	Simple Product	24-WQ081-pink	100.0000	\$23.00
<input checked="" type="checkbox"/> 26		Sprite Stasis Ball 55 cm	Simple Product	24-WQ081-blue	100.0000	\$23.00
<input type="checkbox"/> 27		Sprite Stasis Ball 65 cm	Simple Product	24-WQ082-grey	100.0000	\$27.00
<input type="checkbox"/> 28		Sprite Stasis Ball 65 cm	Simple Product	24-WQ082-pink	100.0000	\$27.00
<input checked="" type="checkbox"/> 29		Sprite Stasis Ball 65 cm	Simple Product	24-WQ082-blue	100.0000	\$27.00
<input type="checkbox"/> 30		Sprite Stasis Ball 75 cm	Simple Product	24-WQ083-grey	100.0000	\$32.00
<input type="checkbox"/> 31		Sprite Stasis Ball 75 cm	Simple Product	24-WQ083-pink	100.0000	\$32.00
<input checked="" type="checkbox"/> 32		Sprite Stasis Ball 75 cm	Simple Product	24-WQ083-blue	100.0000	\$32.00

### Add Selected Products

- f. After the items appear in the Options section choose one to be the **Default** selection.
- g. In the **Default Quantity** column, enter the quantity of each item that is to be added to the bundle when a customer chooses the item.

- h. To allow customers to change the quantity of a bundle item, select the **User Defined** option.


The quantity can be a preset or user-defined value. However, do not assign the User Defined property to checkbox or multiple-select input types.

By default, the Default Quantity that is included in a bundle item cannot be changed by the customer. However, the customer can enter the quantity of the item that is to be included in the bundle.

For example, if the Default Quantity of the Sprite Status Ball is set to 2, and the customer orders 4 of that bundle option, the total number of total balls purchased is 8.

Is Default	Name	SKU	Default Quantity	User Defined
<input type="radio"/>	Sprite Status Ball 55 cm	24-W0081-blue	1	<input type="checkbox"/>
<input checked="" type="radio"/>	Sprite Status Ball 65 cm	24-W0082-blue	1	<input type="checkbox"/>
<input type="radio"/>	Sprite Status Ball 75 cm	24-W0083-blue	1	<input checked="" type="checkbox"/>

*Item Detail*


- Repeat these steps for each item you want to add to the bundle.
- To remove any item from the bundle, tap the **Delete** (  ) icon.
- When complete, tap **Save**.

## Step 6: Complete the Product Information


Scroll down and complete the information in the following sections as needed:

- Content
- Images and Videos
- Search Engine Optimization
- Related Products, Up-Sells, and Cross-Sells
- Customizable Options
- Products in Websites
- Design
- Gift Options

## Step 7: Publish the Product

1. If you are ready to publish the product in the catalog, set the **Enable Product** switch to the “Yes” (  ) position.
2. Do one of the following:


### Method 1: Save and Preview

1. In the upper-right corner, tap **Save**.
2. To view the product in your store, choose **Customer View** on the **Admin** (  ) menu. The store opens in a new browser tab.



*Customer View*

### Method 2: Save and Close

On the **Save** (  ) menu, choose **Save & Close**.



*Save & Close*

Input Controls

CONTROL	DESCRIPTION
Drop-down	<p>Displays a drop-down list of options with the product name and price. Only one item can be selected.</p> <div><div>Drop-down *</div><div><div>Choose a selection...</div><div><div>Choose a selection...</div><div>Cruise Dual Analog Watch +\$55.00</div><div>Dash Digital Watch +\$92.00</div><div>Luma Analog Watch +\$43.00</div><div>Clamber Watch +\$54.00</div></div></div></div>
Radio Buttons	<p>Displays a radio button for each option, followed by the product name and price. Only one item can be selected.</p> <div><div>Radio Buttons *</div><div><div><input checked="" type="radio"/> Erika Running Short-28-Green + \$45.00</div><div><input type="radio"/> Erika Running Short-28-Purple + \$45.00</div><div><input type="radio"/> Erika Running Short-28-Red + \$45.00</div></div></div>
Checkbox	<p>Displays a checkbox for each option, followed by the product name and price. Multiple items can be selected.</p> <div><div>Checkbox *</div><div><div><input type="checkbox"/> 1 x Antonia Racer Tank-L-Black + \$29.00</div><div><input checked="" type="checkbox"/> 1 x Antonia Racer Tank-L-Purple + \$29.00</div><div><input type="checkbox"/> 1 x Antonia Racer Tank-L-Yellow + \$29.00</div></div></div>
Multiple Select	<p>Displays a list of options with the product name and price. To select multiple items, hold down the Ctrl (or Option) key, and click each item.</p> <div><div>Multiple Select *</div><div><div>Joust Duffie Bag +\$34.00</div><div>Impulse Duffie +\$74.00</div><div>Voyage Yoga Bag +\$32.00</div></div></div>

## Field Descriptions

FIELD	DESCRIPTION
SKU	Determines if each item is assigned a variable, dynamic SKU, or if a fixed SKU is used for the bundle. Options include: Fixed / Dynamic.
Weight	Specifies the weight is calculated based on the items selected, or is a fixed weight for the entire bundle. Options include: Fixed / Dynamic.
Price View	Determines if the product price is shown as a range, from the least expensive to the most expensive (Price Range), or with the least expensive shown (As Low As). Options include: Price Range / As Low As.
Ship Bundle Items	Specifies if individual items can be shipped separately.

## THINGS TO REMEMBER

- ☒ Customers can “build their own” bundle product.
- ☒ Bundle items can be simple or virtual products without custom options.
- ☒ The Price View can be set to a price range or to “As Low As.”
- ☒ SKU and Weight can be either “Fixed” or “Dynamic.”
- ☒ The quantity can be a preset or user-defined value. However, do not assign the User Defined property to checkbox or multiple-select input types.
- ☒ Bundle items can be shipped together or separately.

## Downloadable Product

A downloadable product can be anything that you can deliver as a file, such as an eBook, music, video, software application, or update. You can offer an album for sale, and sell each song individually. You can also use a downloadable product to deliver an electronic version of your product catalog.

Because the actual download doesn't become available until after the purchase, you can provide samples, such as an excerpt from a book, a clip from an audio file, or a trailer from a video that the customer can try before purchasing the product. The files that you make available for download can be either uploaded to your server, or from a different server.



*Downloadable Product*

Downloadable products can be configured to require that the customer log in to an account to receive the link, or can be sent by email and shared with others. The status of the order before the download becomes available, default values, and other delivery options are set in the configuration. To learn more, see: [Configuring Download Options](#).

The following instructions take you through the process of creating a downloadable product with the basic fields. Each required field is marked in the Admin with a red asterisk (\*). After you complete the required settings and save the product, you can add images and complete the remaining product information as needed.

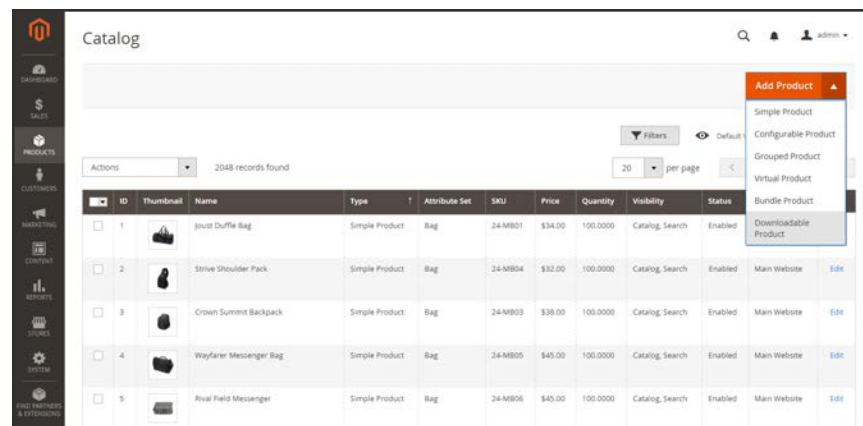
Downloadable file names can include letters and numbers. Either a dash or underscore character can be used to represent a space between words. Any invalid characters in the file name are replaced with an underscore.

**Process Overview:**

- Step 1: **Choose the Product Type**
- Step 2: **Choose the Attribute Set**
- Step 3: **Complete the Required Settings**
- Step 4: **Complete the Basic Settings**
- Step 5: **Complete the Downloadable Information**
- Step 6: **Complete the Product Information**
- Step 7: **Publish the Product**

**Step 1: Choose the Product Type**

1. On the Admin sidebar, tap **Products**. Then under Inventory, choose **Catalog**.
2. In the upper-right corner on the **Add Product** (▼) menu, choose **Downloadable Product**.

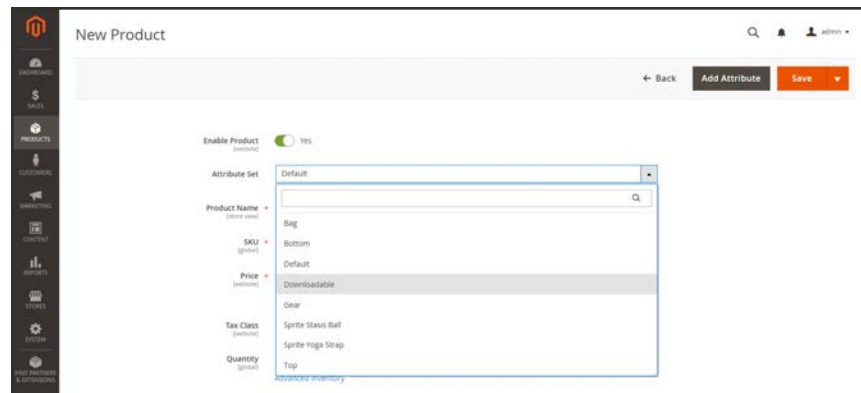
*Add Downloadable Product***Step 2: Choose the Attribute Set**

The sample data includes an **attribute set** called “Downloadable” that has special fields for downloadable products. You can use an existing template, or create another before the product is saved.

To choose the attribute set that is used as a template for the product, do one of the following:


- In the **Search** box, enter the name of the attribute set.
- In the list, choose the “Downloadable” attribute set.

The form is updated to reflect the change.



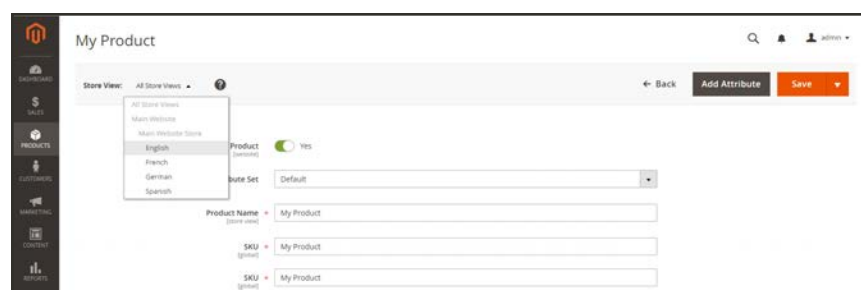
*Choose Attribute Set*

### Step 3: Complete the Required Settings

1. Enter the product **Product Name**.
2. Accept the default **SKU** that is based on the product name, or enter another.
3. Enter the product **Price**.
4. Because the product is not yet ready to publish, set the **Enable Product** switch to the “No” (  ) position.
5. Tap **Save** and continue.

When the product is saved, the **Store View** chooser appears in the upper-left corner.

6. Choose the **Store View** where the product is to be available.



*Choose Store View*



## Step 4: Complete the Basic Settings

1. Set **Tax Class** to one of the following:
  - None
  - Taxable Goods
2. Enter the **Quantity** of the product that is currently in stock.  
Take note of the following:
  - By default, **Stock Status** is set to “Out of Stock.”
  - The **Weight** field is not used, because downloadable products are not shipped.
3. Accept the default **Visibility** setting, “Catalog, Search.”
4. To feature the product in the list of **new products**, mark the **Set Product as New** checkbox.
5. To assign **Categories** to the product, tap the **Select...** box. Then, do either of the following:

### Choose an existing category:

- a. Start typing in the box to find a match.
- b. Mark the checkbox of each category that is to be assigned.

### Create a new category:


- a. Tap **New Category**.
  - b. Enter the **Category Name** and choose the **Parent Category** to determine its position in the menu structure.
  - c. Tap **Create Category**.
6. Set **Format** to one of the following:
    - Download
    - DVD

If necessary, you can edit the **attribute** to add more values.

Product Details

There might be additional attributes that describe the product. The selection varies attribute set, and you can complete them later.

Step 5: Complete the Downloadable Information

- 1. Scroll down to **Downloadable Information**, and expand  the section. Then, mark the **Is this downloadable product?** checkbox.

The Downloadable Information section has two parts. The first part describes each download link, and the second part describes each sample file. The default value for many of these options can be set in the **configuration**.

Downloadable Information

## Part 1: Complete the Links

1. In the Links section, enter the **Title** that you want to use as a heading for the download links.
2. If applicable, mark the **Links can be purchased separately** checkbox.
3. Tap **Add Link**. Then, do the following:
  - a. Enter the **Title** and **Price** of the download.
  - b. For both **File** and **Sample** files, choose one of the following methods of distribution for the downloads:

**Upload File** To upload the the distribution file to the server, choose “Upload File.” Then, browse to the file, and select it for upload.

**URL** To access the distribution file from a URL, choose “URL” Then, enter the full URL to the download file.

- c. Set **Shareable** to one of the following:

**No** Requires customers to log in to their accounts to access the download link.

**Yes** Sends the link by email, which customers can share with others.

**Use Config** Uses the method that is specified in the **Downloadable Product Options** configuration.

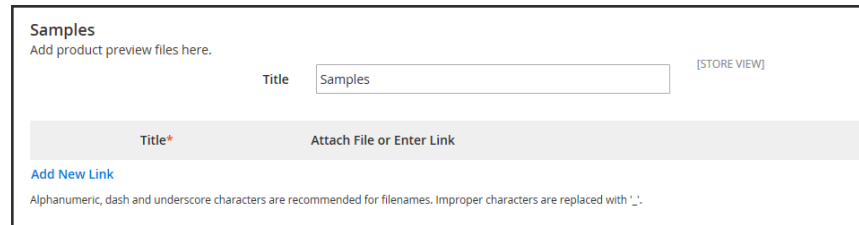
- d. Do one of the following:
  - To limit downloads per customer, enter the number of **Max. Downloads**.
  - To allow unlimited downloads, mark the **Unlimited** checkbox.

*Link Detail*

4. To add another link, tap **Add Link**. Then, repeat these steps.

## Part 2: Complete the Samples

1. In the Samples section, enter the **Title** that you want to use as a heading for the samples.
2. To complete the information for each sample, tap **Add Link**.



**Samples**  
Add product preview files here.


Title  [STORE VIEW]

Title*	Attach File or Enter Link
<a href="#">Add New Link</a>	

Alphanumeric, dash and underscore characters are recommended for filenames. Improper characters are replaced with '\_'.

### *Samples*

3. Complete the link detail as follows:
  - a. Enter the **Title** of the individual sample.
  - b. Choose one of the following distribution methods:
 


Upload File	To upload the the sample distribution file to the server, choose “Upload File.” Then, browse to the file, and select it for upload.
URL	To access the sample distribution file from a URL, choose “URL” Then, enter the full URL to the download file.
  - c. To add another sample, tap **Add Link**, and repeat these steps.
  - d. To change the order of the samples, grab the **Change Order**  icon, and drag the sample to a new position.

## Step 6: Complete the Product Information

Scroll down and complete the information in the following sections as needed:

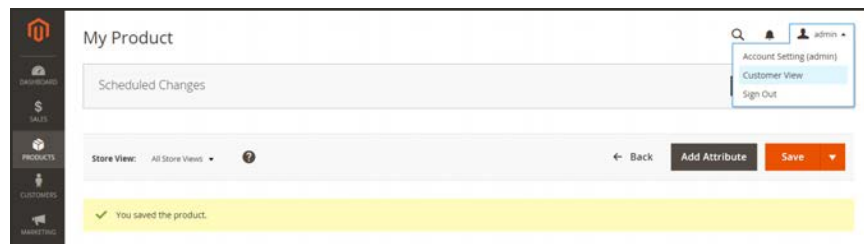
- **Content**
- **Images and Videos**
- **Search Engine Optimization**
- **Related Products, Up-Sells, and Cross-Sells**
- **Customizable Options**
- **Products in Websites**
- **Design**
- **Gift Options**

## Step 7: Publish the Product

1. If you are ready to publish the product in the catalog, set the **Enable Product** switch to the “Yes” (  ) position.
2. Do one of the following:


### Method 1: Save and Preview

1. In the upper-right corner, tap **Save**.
2. To view the product in your store, choose **Customer View** on the **Admin** ( ▼ ) menu. The store opens in a new browser tab.



*Customer View*

### Method 2: Save and Close

On the **Save** (  ) menu, choose **Save & Close**.



*Save & Close*


### THINGS TO REMEMBER

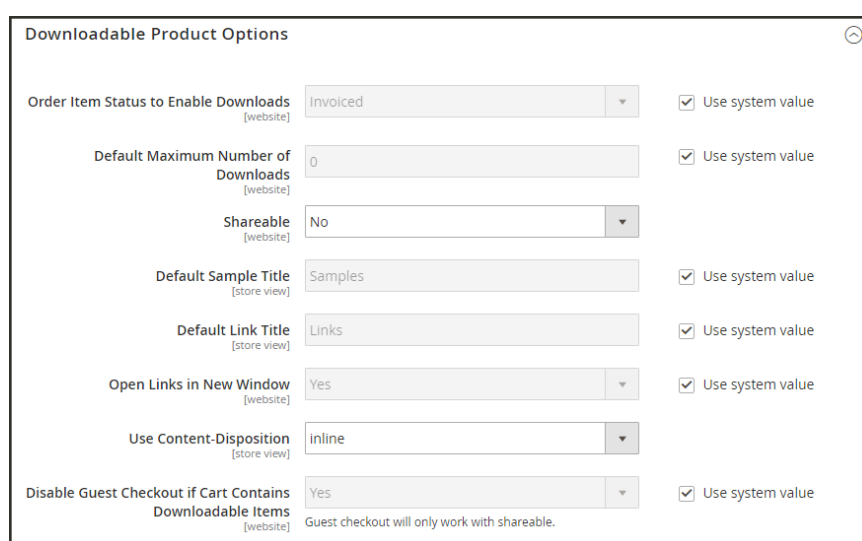
- ☒ Downloadable products can be uploaded to the server, or linked to from another server on the Internet.
- ☒ You can determine the number of times a customer can download a product.
- ☒ Customers who purchase a downloadable product can be required to log in before going through checkout.
- ☒ The delivery of a downloadable product can be made when the order is in either a “Pending” or “Invoiced” state.

## Configuring Download Options

The downloadable configuration settings determine the default values and delivery options for downloadable products, and specify if guests can purchase downloads.

### To configure download options:

1. On the Admin sidebar, tap **Stores**. Then under Settings, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Catalog**.
3. Expand  the **Downloadable Product Options** section, and do the following:



Downloadable Product Options	
Order Item Status to Enable Downloads <small>[website]</small>	Invoiced <input type="checkbox"/> Use system value
Default Maximum Number of Downloads <small>[website]</small>	0 <input type="checkbox"/> Use system value
Shareable <small>[website]</small>	No <input type="checkbox"/> Use system value
Default Sample Title <small>[store view]</small>	Samples <input type="checkbox"/> Use system value
Default Link Title <small>[store view]</small>	Links <input type="checkbox"/> Use system value
Open Links in New Window <small>[website]</small>	Yes <input type="checkbox"/> Use system value
Use Content-Disposition <small>[store view]</small>	inline <input type="checkbox"/> Use system value
Disable Guest Checkout if Cart Contains Downloadable Items <small>[website]</small>	Yes <input type="checkbox"/> Use system value

Guest checkout will only work with shareable.

### *Downloadable Product Options*

- To determine the stage in the order workflow when the download becomes available, set **Order Item Status to Enable Downloads** to one of the following:
  - Pending
  - Invoiced
- To set a default limit on the number of downloads that a single customer can make, enter the number in the **Default Maximum Number of Downloads** field.
- Set **Shareable** to one of the following:
 

Yes	Allows customers to email the download link to others.
No	Prevents customers from sharing the download link with others by requiring customers to log in to their accounts to access download links.
- In the **Default Sample Title** field, enter the heading that you want to appear above the selection of samples.

**Trailers**  
[Trailer #1](#)  
[Trailer #2](#)  
[Trailer #3](#)

*Sample Title*

- e. In the **Default Link Title** field, enter the default text that you want to use for download links.
  - f. If you want the download link to open in a new browser window, set **Opens Links in New Window** to “Yes.” This setting is used to keep the browser window to your store open.
  - g. To determine how downloadable content is delivered, set **Use Content Disposition** to one of the following:

Attachment	Delivers the download link by email as an attachment.
Inline	Delivers the download link as a link on a web page.
  - h. If you want to require that purchasers register for a customer account and log in before purchasing a download, set **Disable Guest Checkout if Cart Contains Downloadable Items** to “Yes.”
4. When complete, tap **Save Config**.



## Gift Cards

There are three kinds of gift card products: virtual gift cards sent by email, physical gift cards, which can be shipped to the recipient, and a combination of the two. Each gift card has a unique code, which can be redeemed by only one customer during checkout. A **code pool** must be established before gift cards can be sold.



*Physical Gift Card*

### Virtual

A virtual gift card is sent to the recipient by email. The order requires an email address for the recipient. A shipping address is not necessary.

### Physical

A physical gift card is shipped to recipient's address, which is required during the purchase of the gift card.

### Combined

The gift card is shipped and emailed to the recipient. The recipient's email and shipping address is required to purchase the gift card.

## Gift Card Workflow

Gift cards are redeemed in the shopping cart similar to the way a coupon is applied to an order. During checkout, the shopper enters the gift card code to apply an amount from the gift card to the purchase. Gift card holders who have customer accounts can check the status and remaining balance from their account dashboard. Single, as well as multiple gift cards can be used to pay for all, or part of a purchase.

The gift card code(s) applied to an order can be viewed by opening the order in the Admin, which makes it possible for you to retrieve the code to place it on a physical gift card, if necessary. If a gift card order is canceled or refunded, you must manually cancel the associated gift card account. You can either delete the account entirely, or deactivate it.

The screenshot shows the Luma e-commerce store interface. At the top, there's a navigation bar with links like 'What's New', 'Women', 'Men', 'Gear', 'Training', 'Sale', and 'Gift Cards'. Below this, a sidebar on the left contains links for 'Account Dashboard', 'Account Information', 'Address Book', and 'My Orders'. The main content area displays 'Order # 000000003' with a 'PENDING' status and the date 'February 2, 2016'. A table titled 'Items Ordered' shows one item: 'Luma Mailed Gift Card' with SKU '243-MB04', price '\$25.00', and quantity '1'. Below the table, there are fields for 'Gift Card Sender' (Rina), 'Gift Card Recipient' (Jane), and 'Gift Card Message' (Happy Birthday!). A summary table at the bottom right shows the 'Subtotal' as \$25.00, 'Shipping & Handling' as \$5.00, 'Store Credit' as -\$7.64, and an 'Estimated Total' of \$22.36.

Product Name	SKU	Price	Qty	Subtotal
Luma Mailed Gift Card	243-MB04	\$25.00	Ordered: 1	\$25.00

Subtotal	\$25.00
Shipping & Handling	\$5.00
Store Credit	-\$7.64
<b>Estimated Total</b>	<b>\$22.36</b>

*Gift Card Detail in Cart*

## Scenario

For example, a customer shopping in the demo Luma store can purchase either a virtual or physical gift card.

### Virtual Gift Card

A Luma virtual gift card is emailed with an optional message to your special someone. It can be redeemed on any of the Luma family of websites and will never expire. Give the gift of purchase power!

### Physical Gift Card

A Luma gift card is packaged in a custom art mailer, and sent at no charge to your special someone. It can be redeemed in store, by phone, or on any of the Luma family of websites. It will never expire. Give the gift of purchase power!

1

**Customer determines the gift card value.** The customer determines the value of the gift card from the product page. Depending on the configuration, there is either a fixed price field, a list of price options, or both. All amounts appear in the currency that is used in the store.

2

**Customer completes the gift card information.** For a physical gift card, the customer enters the Sender Name and Recipient Name. For virtual or combined gift cards, the customer also enters the Sender Email and Recipient Email. If the customer is logged in, the Sender Name (and Sender Email, if applicable) is entered automatically from their account. Depending on the configuration, the customer might also enter a message to the recipient.

3

**Customer completes checkout.** The gift card appears as a line item in the cart with detail that shows the name of the sender and recipient, and message, if applicable. The amount associated with the gift card is converted to the base currency of the store when it is added to the cart.

4

**Customer receives confirmation of the order.** The gift card purchaser can click the link in the confirmation to track the order from their account dashboard.

5

**Recipient receives the gift card.** For virtual or combined gift cards, the recipient receives an email with the gift card code, name of the sender, and message, if applicable. If multiple gift cards are purchased in a single order, and the type is either virtual or combined, all corresponding gift card codes are sent to the recipient in a single email.

Physical gift cards can be shipped directly to the recipient, or to the customer, who can then personally deliver the gift card to the recipient.

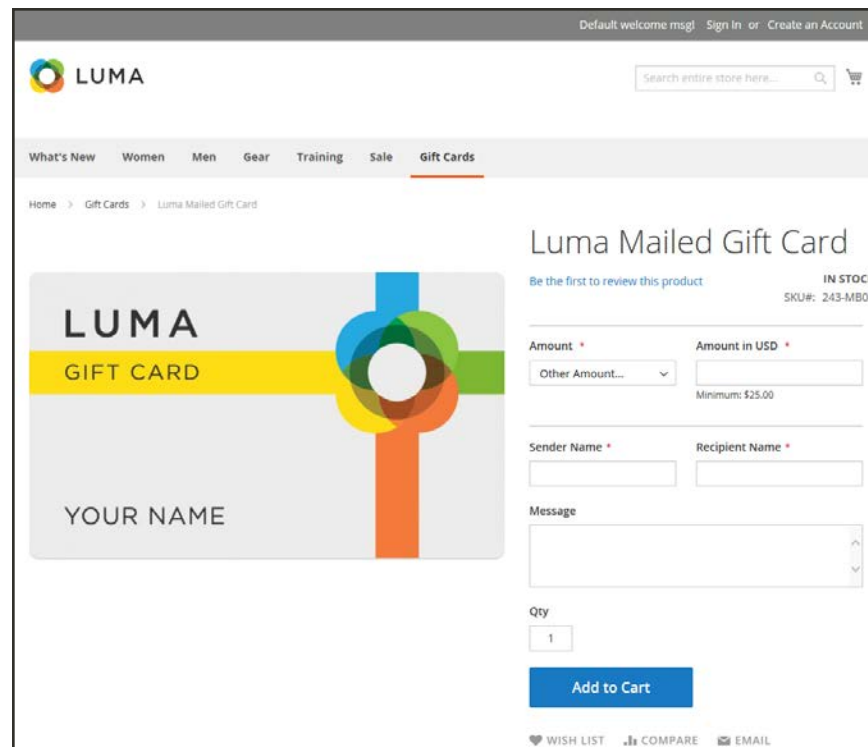
6

**Recipient applies gift card to purchase.** The gift card purchases an item in your store, and applies the gift card code during checkout. Each time a gift card is applied during checkout, the amount appears in the order totals block, and is subtracted from the grand total. The full balance of each gift card is subtracted from the shopping cart total.

If multiple gift cards are used to pay for a purchase, the amounts are applied in ascending order, starting with the card with the smallest remaining balance, until the customer runs out of cards, or until the grand total is zero. When the grand total reaches zero, the last gift card account applied to the cart receives a partial deduction. Any cards that have not been applied to the cart do not receive a deduction. The amounts are deducted from the gift card accounts only after the order is placed.

## Creating a Gift Card

The following instructions take you through the process of creating a gift card with the required fields. Each required field is marked with a red asterisk (\*). After you complete the required settings and save the product, you can add images and complete the **advanced settings** and **other settings** as needed.



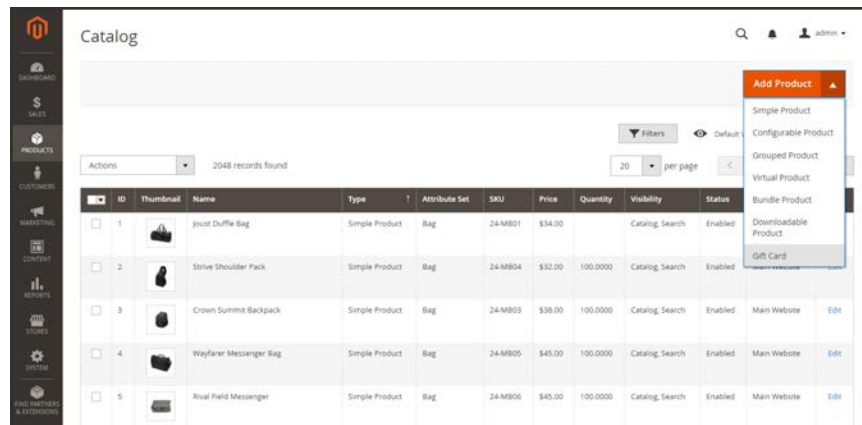
*Gift Card Product Page*

### Process Overview:

- Step 1: Choose the Product Type
- Step 2: Choose the Attribute Set
- Step 3: Complete the Required Settings
- Step 4: Complete the Basic Settings
- Step 5: Complete the Gift Card Information
- Step 6: Complete the Product Information
- Step 7: Publish the Product

### Step 1: Choose the Product Type

1. On the Admin sidebar, tap **Products**. Then under Inventory, choose **Catalog**.
2. In the upper-right corner on the **Add Product** (▼) menu, choose **Gift Card**.

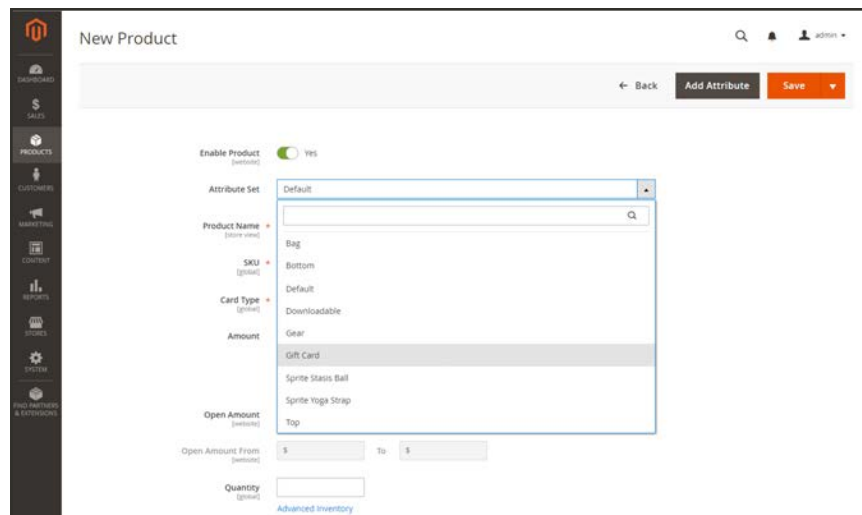


*Add Gift Card*

## Step 2: Choose the Attribute Set

You can use the default “Gift Card” attribute set, or choose another. To choose the attribute set that is used as a template for the product, do one of the following:

- In the **Search** box, enter the name of the attribute set,
- In the list, choose the attribute set that you want to use.



*Choose Attribute Set*

## Step 3: Complete the Required Settings

1. Enter a **Product Name** for the gift card. You might also indicate the type of gift card in the name. For example, “Luma Virtual Gift Card.”
2. Enter a **SKU** for the product. By default, the Product Name is used as the default SKU.

3. Set **Card Type** to one of the following:

Virtual	Virtual gift cards are delivered by email to the recipient.
Physical	Physical gift cards can be mass produced in advance and embossed with unique codes.
Combined	A combined gift card has the characteristics of both a virtual and physical gift card.

The screenshot shows the 'New Product' form in the Magento Commerce admin interface. The 'Card Type' dropdown menu is open, showing three options: 'Virtual' (selected), 'Physical', and 'Combined'. The 'Add Amount' button is visible below the dropdown. The form also includes fields for 'Attribute Set', 'Product Name', 'SKU', and 'Open Amount'.

*Gift Card Type*

1. To offer the customer a choice of fixed amounts, tap **Add Amount**. Then, enter the first fixed value of the card as a decimal. Repeat this step to enter the selection of fixed amounts.

The screenshot shows the 'Add Amount' section of the 'New Product' form. It displays three fixed amount entries: '\$ 25.00', '\$ 50.00', and '\$ 75.00'. Each entry has a trash icon to its right. Below the entries is an 'Add Amount' button. At the bottom, the 'Open Amount' toggle is set to 'Yes', and the 'Open Amount From' and 'To' fields are set to '\$ 25.00' and '\$ 500.00' respectively.

*Gift Card Amounts*

2. To give customers the ability to set the value of the gift card, do the following:
  - a. Set **Open Amount** to the “Yes” position.
  - b. To define the range of minimum and maximum acceptable values, enter the **Open Amount From** and **To** values.

You can create gift cards with fixed pricing, open amount pricing, or both.

### Step 4: Complete the Basic Settings

1. For a physical or combined gift card, enter the **Quantity** in stock.
2. If the gift card that is to be shipped, enter the **Weight** of the package.
3. In the **Categories** field, choose “Gift Card.”
4. There might be additional individual attributes that describe the product. The selection varies attribute set, and you can complete them later.

### Step 5: Complete the Gift Card Information

1. Scroll down to the **Gift Card Information** section.

The default settings in this section are determined by the system configuration.

*Gift Card Information*

2. Clear the **Use Config Settings** checkbox of any of the following fields that you want to change:

Treat Balance as Store Credit	Determines if the gift card holder can redeem the balance as store credit.
Lifetime (days)	Determines the number of days after purchase until the gift card expires. If you do not want to set a limit for the lifetime of the card, leave this field blank.
Allow Message	Determines if the purchaser of the gift card can enter a message for to the recipient. A gift message can be included for both virtual (emailed) and physical (shipped) gift cards.
Email Template	Determines the email template that is used for the notification sent to the recipient of a gift card.


### Step 6: Complete the Product Information

Complete the information in the following sections as needed:


- **Content**
- **Images and Videos**
- **Related Products, Up-Sells, and Cross-Sells**

- Search Engine Optimization
- Customizable Options
- Products in Websites
- Design
- Gift Options

## Step 7: Publish the Product

1. If you are ready to publish the product in the catalog, set the **Enable Product** switch to the “Yes” (  ) position.
2. Do one of the following:

### Save and Preview

1. In the upper-right corner, tap **Save**.
2. To view the product in your store, choose **Customer View** on the **Admin** (  ) menu,



*Customer View*

### Save and Close

On the **Save** (  ) menu, choose **Save & Close**.



*Save & Close*



### Things to Remember

- ☒ A “code pool” of unique numbers must be generated before a gift card can be offered for sale.
- ☒ The three types of gift cards are: Virtual, Physical, and Combined.
- ☒ Gift cards can be set to “Redeemable” or “Non-Redeemable.”
- ☒ The lifetime of a gift card can be unlimited, or set to a number of days.
- ☒ The value of a gift card can be set to a fixed amount, or set to an open amount with a minimum and maximum value.
- ☒ A gift card account for the customer can be created when the order is placed, or at the time of invoice.

## Gift Card Accounts

A gift card account is automatically created for each Gift Card that is purchased. The value of the gift card can then be applied toward the purchase of a product in your store. You can also create gift card accounts from the Admin as a promotion or service for customers. The gift card account number corresponds to the gift card code.

Gift Card Accounts

Code Pool used: 0.2% (free 998 of 1000 total). Generate new code pool [here](#).

Search [Reset Filter](#) Export to: CSV Export

Actions 2 records found 20 per page 1 of 1

	ID	Code	Website	Created	End	Active	Status	Balance
<input type="checkbox"/>	2	056CDQ6M5KDG	Main Website	Feb 1, 2016	Dec 30, 2016	Yes	Available	\$100.00
<input type="checkbox"/>	1	00XMCCE0BZBUM	Main Website	Feb 1, 2016	--	Yes	Available	\$25.00

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*Gift Card Accounts*

### To examine an existing gift card account:

1. If you need to find the number of the gift card account for a current order, do the following:
  - a. On the Admin sidebar, tap **Sales**. Then under **Operations**, choose **Orders**.
  - b. Find the order in the list, and in the **Action** column, click **View**.
  - c. Scroll down to the Items Ordered section. The number is in the Product column, under **Gift Card Accounts**.
2. On the Admin sidebar, tap **Marketing**.
3. Under **Promotions**, choose **Gift Card Accounts**.
4. Find the gift card account in the grid, and open in edit mode.

The Gift Card Code appears at the top of the Information section.

00XMCEO8Z8UM

← Back Delete Reset Save & Send Email Save

**GIFT CARD ACCOUNT**

Information

Send Gift Card

History

Information

Gift Card Code 00XMCEO8Z8UM

Status Available

Active Yes

Redeemable No

Website Main Website ?

Balance 25.00 [USD]

Expiration Date

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*Gift Card Account Information*

### To create a gift card account:

1. On the Admin sidebar, tap **Marketing**.
2. In the upper-right corner, click the **Add Gift Card Account** button. Then, do the following:

New Account

← Back Reset Save & Send Email Save

**GIFT CARD ACCOUNT**

Information

Send Gift Card

History

Information

Active Yes

Redeemable Yes


Website -- Please Select -- ?

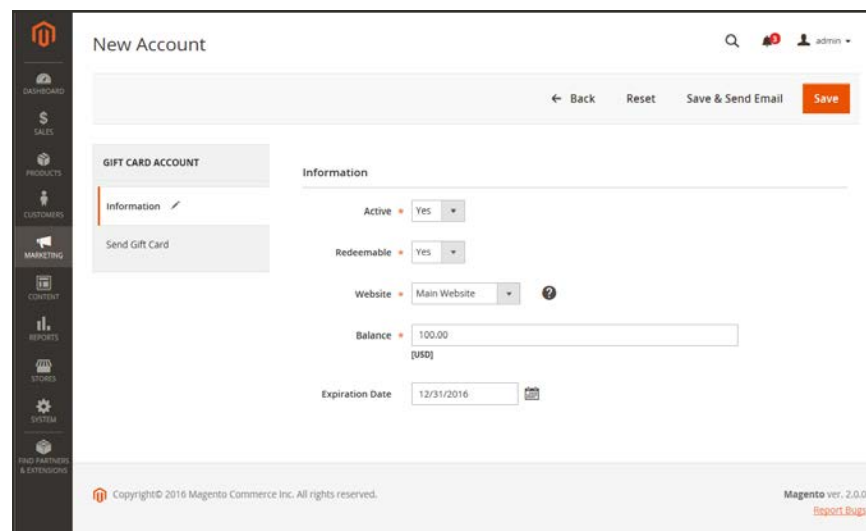
Balance

Expiration Date

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*New Account*

3. In the **Information** section, make sure that **Active** is set to “Yes.” Then, do the following:
  - a. To make the card balance redeemable at checkout, or transferred to the customer’s store credit, set **Redeemable** to “Yes.”
  - b. Choose the **Website** where the gift card account can be used.
  - c. Enter the initial **Balance** on the gift card.
  - d. To set an **Expiration Date** for the gift card, select the date from the calendar . If left blank, the gift card account will not expire.



The screenshot shows the 'New Account' page in the Magento 2.0.0 admin interface. The left sidebar contains navigation links for Dashboard, Sales, Products, Customers, Marketing, Content, Reports, Stores, System, and Integrations & Extensions. The main content area is titled 'New Account' and features a 'GIFT CARD ACCOUNT' section. Within this section, the 'Information' tab is selected, showing the following fields:

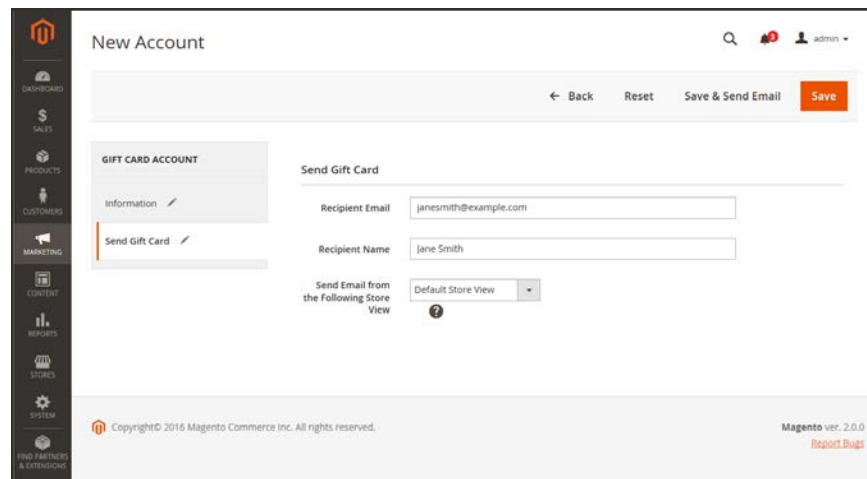
- Active:** A dropdown menu set to 'Yes'.
- Redeemable:** A dropdown menu set to 'Yes'.
- Website:** A dropdown menu set to 'Main Website'.
- Balance:** A text input field containing '100.00' with a currency selector set to 'USD'.
- Expiration Date:** A date picker field showing '12/31/2016'.

At the top right of the form, there are buttons for 'Back', 'Reset', 'Save & Send Email', and 'Save'. The footer of the page includes the copyright notice 'Copyright© 2016 Magento Commerce Inc. All rights reserved.' and the version 'Magento ver. 2.0.0' with a 'Report Bugs' link.

*Gift Card Information*

In the panel on the left, choose **Send Gift Card**. Then, do the following:

- a. Enter the **Recipient Email** address.
- b. Enter the **Recipient Name**.
- c. Set **Send Email from the Following Store View** to the store view that appears as the sender of the gift card notification.



*Send Gift Card Settings*

4. Do one of the following:
  - If you are not ready to send the gift card, tap **Save**.
  - Tap **Save & Send Email** to save the changes and send the gift card by email to the recipient.

## Configuring Gift Card Accounts

The Gift Card configuration establishes the default settings for all gift cards for the store view, and manages the code pool. The code pool is a set of unique gift card codes in a specific format. Codes from the pool are used each time a gift card account is created. It is the responsibility of the store administrator to ensure that there are enough codes available for gift card sales. Make sure to generate a code pool before offering gift cards for sale. By default, Magento generates 1,000 codes. A new pool is not generated until there are no more codes available in the current pool.

### Step 1: Configure Email Notifications

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Gift Cards**.
3. Expand ☑ the **Gift Card Email Settings** section. Then do the following:
  - a. Set **Gift Card Notification Email Sender** to the store identity that appears as the sender of gift card notifications.
  - b. Set **Gift Card Notification Email Template** to the template that is used for the notification.



The screenshot shows the 'Gift Card Email Settings' configuration panel. It contains two dropdown menus. The first dropdown, labeled 'Gift Card Notification Email Sender' with a '(store view)' link below it, is set to 'General Contact'. The second dropdown, labeled 'Gift Card Notification Email Template' with a '(store view)' link below it, is set to 'Gift Card(s) Purchase (Default)'.

*Gift Card Email Settings*

4. Expand ☑ the **Email Sent from Gift Card Account Management** section. Then, do the following:
  - a. Set **Gift Card Email Sender** to the store identity to appear as the sender of the gift cards.
  - b. Set **Gift Card Template** to the template you want to use for the gift card.

Step 2: Complete the General Settings

- 1. Expand ☺ the **Gift Card General Settings** section.
- 2. To allow the customer to redeem the value on the card for cash, set **Redeemable** to “Yes.”
- 3. In the **Lifetime (days)** field, enter the number of days before the card expires. Leave the field blank if there is no expiration date.

Depending on your location, it may be illegal for gift cards to expire. Check your local laws before setting a lifetime for your gift cards.

- 4. If you want the customer to have the option to enter a message to accompany the gift card, set **Allow Gift Message** to “Yes.” Then in the **Gift Message Maximum Length** field, enter the number of characters available for the message.
- 5. Set **Generate Gift Card Account when Orders Item is** to one of the following:

Ordered	The gift card account is created when the order is placed.
Invoiced	The gift card account is created after payment is captured and the order is invoiced.

Gift Card General Settings

Redeemable

Yes

Lifetime (days)

0

if empty no expiration.

Allow Gift Message

Yes

Gift Message Maximum Length

255

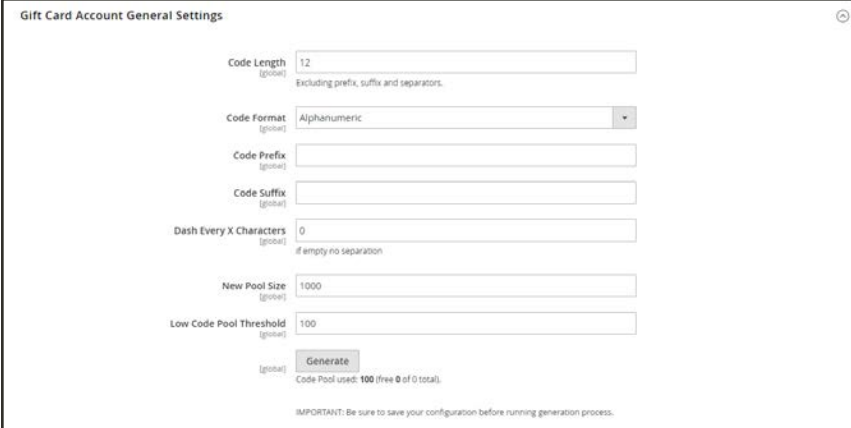
Generate Gift Card Account when Order Item is

Invoiced

Gift Card General Settings

Step 3: Establish the Gift Card Code Pool

- 6. Expand ☺ the **Gift Card Account General Settings** section. Then, do the following:



The screenshot shows the 'Gift Card Account General Settings' form. It includes the following fields and controls:

- Code Length**: A text input field with the value '12'. Below it, a note says 'excluding prefix, suffix and separators.'
- Code Format**: A dropdown menu currently set to 'Alphanumeric'.
- Code Prefix**: A text input field.
- Code Suffix**: A text input field.
- Dash Every X Characters**: A text input field with the value '0'. Below it, a note says 'if empty no separation'.
- New Pool Size**: A text input field with the value '1000'.
- Low Code Pool Threshold**: A text input field with the value '100'.
- Generate**: A button. Below it, a status message reads 'Code Pool used: 100 (free 0 of 0 total)'.
- IMPORTANT**: A note at the bottom states 'Be sure to save your configuration before running generation process.'

*Gift Card Account General Settings*

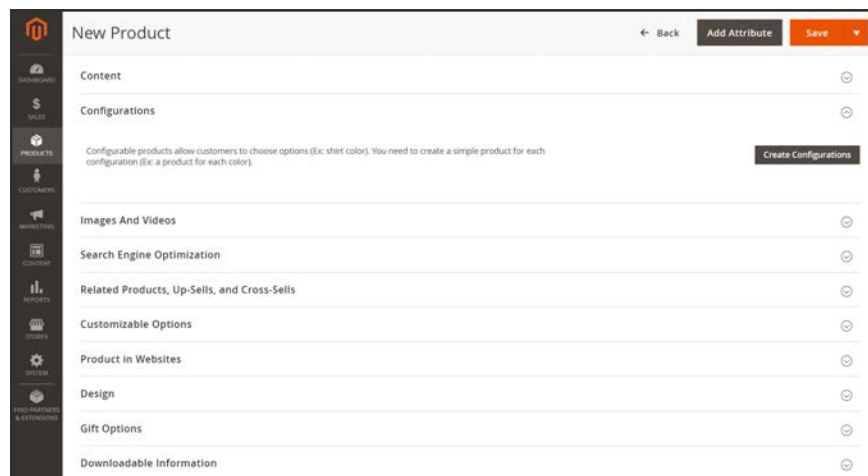
- a. To customize the code, complete the following according to your preference:
  - Code Length
  - Code Format
  - Code Prefix
  - Code Suffix
  - Dash Every X Characters
- b. To determine the number of codes to generate, enter the **New Pool Size**.
- c. To specify when you receive notification to restock the code pool, enter the **Low Code Pool Threshold**.
7. Before you generate the code pool, tap **Save Config**. Then, tap **Generate**.
8. When complete, tap **Save Config**.



## CHAPTER 13:

# Product Settings

The most frequently used product settings and attributes are located at the top of the page, followed by custom attributes. Any other product settings are in expandable sections at the bottom of the page.

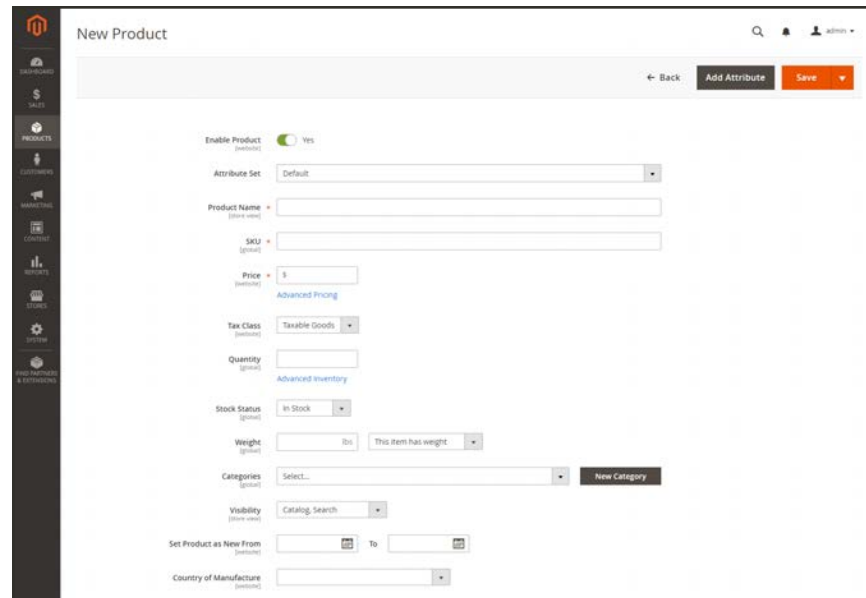


*Product Settings*

## Advanced Product Settings

To access the advanced pricing and inventory settings, click the link below the Price and Quantity fields. To learn more, see:

- [Managing Pricing](#)
- [Managing Inventory](#)



The screenshot displays the 'New Product' form in the Magento 2 admin interface. The form is titled 'New Product' and includes a search bar, a user profile icon, and a 'Save' button. The form is organized into several sections, each with a plus icon to expand it. The sections include:

- Enable Product**: A toggle switch set to 'Yes'.
- Attribute Set**: A dropdown menu set to 'Default'.
- Product Name**: A text input field.
- SKU**: A text input field.
- Price**: A text input field with a dollar sign icon. Below it is a link for 'Advanced Pricing'.
- Tax Class**: A dropdown menu set to 'Taxable Goods'.
- Quantity**: A text input field. Below it is a link for 'Advanced Inventory'.
- Stock Status**: A dropdown menu set to 'In Stock'.
- Weight**: A text input field with a unit dropdown set to 'lb'. To the right is a checkbox labeled 'This item has weight'.
- Categories**: A dropdown menu set to 'Select...'. To the right is a 'New Category' button.
- Visibility**: A dropdown menu set to 'Catalog, Search'.
- Set Product as New From**: A date range selector with 'From' and 'To' fields.
- Country of Manufacture**: A dropdown menu.

*Advanced Links*

## Other Product Settings

The remaining product settings are located at the bottom of the page. Some settings are available for all products, and others are available for specific product types. Additional settings might appear when the product is saved for the first time.

### To expand or collapse each section:

Tap the section. The button indicates if it is currently expanded ☺ or collapsed ☹.

Content	☹
Configurations	☹
Images And Videos	☹
Search Engine Optimization	☹
Related Products, Up-Sells, and Cross-Sells	☹
Customizable Options	☹
Product in Websites	☹
Design	☹
Gift Options	☹
Downloadable Information	☹

*Other Settings*

### General Settings

SECTION	DESCRIPTION
<b>Content</b>	The Content section is used to enter the main product description that appears on the product page. The short description can be used in most RSS feeds, and might also appear in catalog listings, depending on theme. The product description can be formatted using the <b>editor</b> toolbar.
<b>Product Reviews</b>	The Product Reviews section lists all reviews that customers have submitted about the product. The section appears only after a new product has been saved.
<b>Images and Videos</b>	From the Images and Videos section, you can perform basic image management tasks such as upload multiple images, rearrange the order of images, and control how each image is used. For more control over individual images, you can open each image in “detail view.”

SECTION	DESCRIPTION
Search Engine Optimization	The Search Engine Optimization section specifies the <b>URL Key</b> and <b>meta data</b> fields that are used by search engines to index the product. Although some search engines ignore meta keywords, others continue to use them. The current best practice is to incorporate high-value keywords in both the meta title and meta description.
Related Products, Up-Sells, Cross-Sells	This section is used to set up simple promotional blocks that present a selection of additional products that might be of interest to the customer.
Product in Websites	The Product in Websites section shows the current scope of the product within the store hierarchy.
Design	The Design settings give you the ability to apply a different theme to the product page, change the column layout, determine where product options appear, and enter custom XML code
Gift Options	Gift Options can be set at the product level to allow a gift message to be added to the product during checkout.

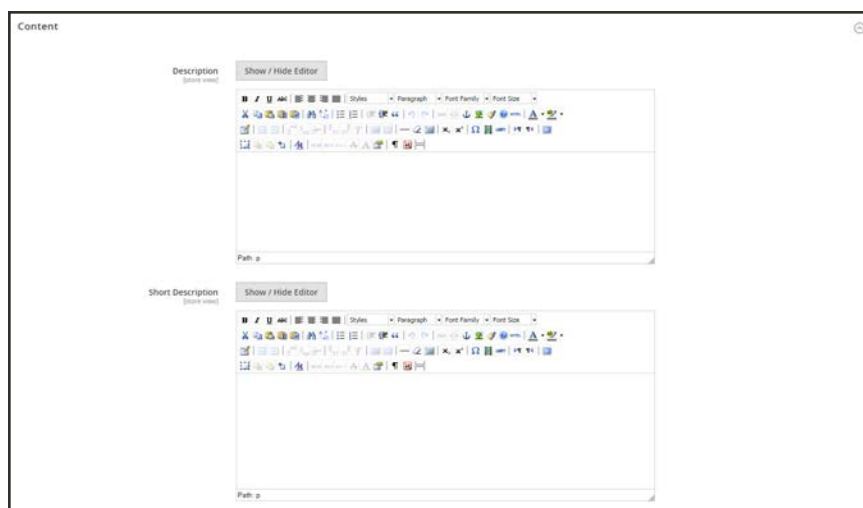
### Product-Specific Settings

SECTION	DESCRIPTION
Configurations	The Configuration section lists any existing variations of the product, and can also be used to generate variations for use with the Configurable product type.
Customizable Options	Customizable options are based on variations of a single SKU, and can be a good solution if your inventory needs are simple.
Downloadable Information	The Downloadable Information section is used to generate the links to downloadable products and samples.
Grouped Products	The Grouped Products section is used to add items to a Grouped product type, and also to edit the current selection of items.
Bundle Items	The Bundle Items section is used to add items to a Bundle product type, and also to edit the current selection of items.

## Content

The Content section is used to enter and edit the main product description that appears on the product page. The short description can be used in most RSS feeds, and might also appear in catalog listings, depending on theme. The product description can be formatted using the [editor toolbar](#).

Enter only plain ASCII characters into the text box. If pasting text from a word processor, save it first as a plain .TXT file to remove any invisible control characters.



*Content*

### To enter the product description:

1. Open the product in edit mode. Then, scroll down and expand ☺ the **Content** section.
2. Enter the main product **Description**, and use the [toolbar](#) to format as needed.  
You can drag the lower-right corner to change the height of the text box.
3. Enter a **Short Description** of the product, and format as needed.

To learn more, see: [Using the Editor](#).

# Configurations

The Configurations section lists any existing variations of the product, and can also be used to generate variations for use with the Configurable product type. To learn more, see: [Configurable Product](#).

Configurations

Configurable products allow customers to choose options (Ex: shirt color). You need to create a simple product for each configuration (Ex: a product for each color).

Create Configurations

Configurations Section





Configurations

Configurable products allow customers to choose options (Ex: shirt color). You need to create a simple product for each configuration (Ex: a product for each color).

[Add Products Manually](#) [Edit Configurations](#)

Current Variations

< 1 of 1 >

Image	Name	SKU	Price	Quantity	Weight	Status	Attributes	Actions
	<a href="#">Abominable Hoodie-XS-Blue</a>	MH09-XS-Blue	\$69.00	100	1.0000	Enabled	Color: Blue, Size: XS	<a href="#">Select</a>
	<a href="#">Abominable Hoodie-S-Blue</a>	MH09-S-Blue	\$69.00	100	1.0000	Enabled	Color: Blue, Size: S	<a href="#">Select</a>
	<a href="#">Abominable Hoodie-M-Blue</a>	MH09-M-Blue	\$69.00	100	1.0000	Enabled	Color: Blue, Size: M	<a href="#">Select</a>
	<a href="#">Abominable Hoodie-L-Blue</a>	MH09-L-Blue	\$69.00	100	1.0000	Enabled	Color: Blue, Size: L	<a href="#">Select</a>

Product Configurations

# Product Reviews

The Product Reviews section lists all reviews that customers have submitted about the product. The section appears with the other product information only after a new product has been saved for the first time. To learn more, see: [Product Reviews](#).




Product Reviews

## Images and Videos



From the Images and Videos section, you can perform basic image management tasks such as upload multiple images, rearrange the order of images, and control how each image is used. For additional control over individual images you can open each image in “detail view.” To learn more, see: [Images and Videos](#).

### To upload an image:

1. Open the product in edit mode.
2. Scroll down and expand  the **Images and Videos** section.



*Images and Videos*

3. If you're ready to add a product image, do one of the following:
  - Drag an image from your desktop, and drop it on the **camera** () tile.
  - Tap the **camera** () tile, and navigate to the image file on your computer. Then, choose the image, and tap **Open**.

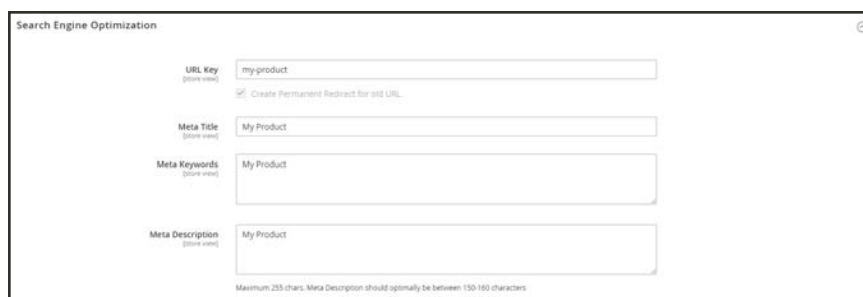
A **placeholder** image appears in the catalog until a product image is available.



## Search Engine Optimization

The Search Engine Optimization section specifies the **URL Key** and **meta data** fields that are used by search engines to index the product. Although some search engines ignore meta keywords, others continue to use them. The current **SEO best practice** is to incorporate high-value keywords in both the meta title and meta description.

The default value for each meta data field can be auto-generated based on values specified in the configuration. Each field contains a placeholder that is replaced by an actual value. To learn more, see: **Default Field Values**.

The screenshot shows a 'Search Engine Optimization' section with several input fields. The 'URL Key' field contains 'myproduct'. Below it is a checkbox labeled 'Create Permanent Redirect for old URL' which is checked. The 'Meta Title' field contains 'My Product'. The 'Meta Keywords' field contains 'My Product'. The 'Meta Description' field contains 'My Product'. At the bottom of the section, there is a small text note: 'Maximum 255 chars. Meta Description should optimally be between 150-160 characters'.

*Search Engine Optimization*

### To complete the SEO fields:

1. Open the product in edit mode. Then, scroll down and expand ☺ the **Search Engine Optimization** section.
2. The default **URL Key** is based on the product name. You can use the default, or change it as needed. To learn more, see: **Catalog URLs**.
3. The **Meta Title** is the text that appears at the top of the browser window. You can use the default, which is based on the Product Name, or change it as needed.
4. The **Meta Keywords** are used by some search engines more than others. Enter a few high-value key words to help the product gain more visibility.
5. The **Meta Description** is the text that appears in search results listings. For best results, enter a description that is between 150-160 characters in length.

## Field Descriptions

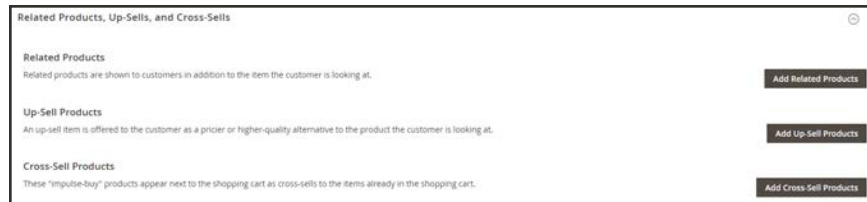
FIELD	SCOPE	DESCRIPTION
URL Key	Store View	<p>Determines the online address of the product. The URL key is added to the base URL of the store, and appears in the address bar of a browser. Magento initially creates a default, “search engine friendly” URL, that is based on the product name.</p> <p>The URL Key should be all lowercase characters, with hyphens instead of spaces. Do not include a suffix such as .html in the URL Key, because it is managed in the configuration.</p>
Meta Title	Store View	<p>The title appears in the title bar and tab of your browser, and is also used as the title on a search engine results page (<a href="#">SERP</a><sup>1</sup>). The meta title should be unique to the page, and less than 70 characters in length.</p> <p>Auto-generated value: {{name}}</p>
Meta Keywords	Store View	<p>Relevant keywords for the product. Consider using keywords that customers might use to find the product.</p> <p>Auto-generated value: {{name}}</p>
Meta Description	Store View	<p>The meta description provides a brief overview of the page for search results listings. An ideal length is between 150-160 characters in length, with a maximum of 255 characters. Although not visible to the customer, some search engines include the meta description on the search results page.</p> <p>Auto-generated value: {{name}} {{description}}</p>

---

<sup>1</sup>Search Engine Results Page

## Related Products, Up-Sells, and Cross-Sells

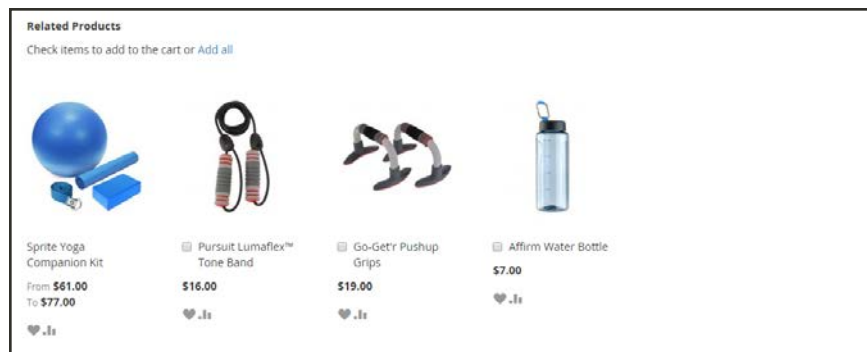
This section is used to set up simple promotional blocks that present a selection of additional products that might be of interest to the customer. To learn more, see: [Product Relationships](#).



*Related Products, Up-Sells, and Cross-Sells*


### Related Products

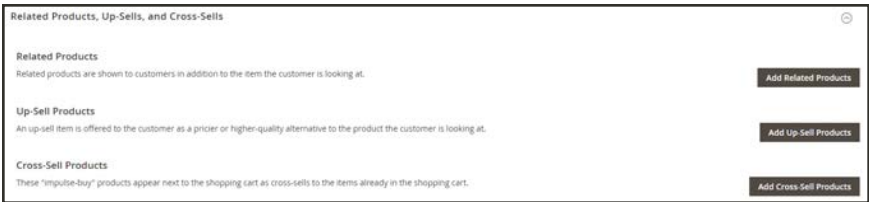
Related products are meant to be purchased in addition to the item the customer is viewing. The customer can place the item in the shopping cart by simply clicking the checkbox. The placement of the Related Products block varies according to theme and page layout. In the example below, it appears at the bottom of the Product View page. With a 2 column layout, the Related Product block often appears in the right sidebar.



*Related Products*

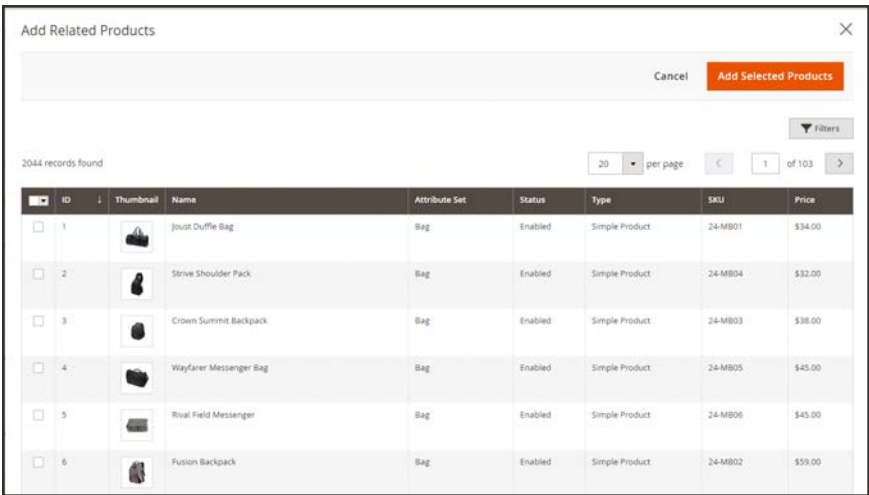
To set up related products:

- 1. Open the product in edit mode.
- 2. Scroll down and expand  the **Related Products, Up-Sells, and Cross-Sells** section. Then, tap **Add Related Products**.



Related Products

- 3. Use the **filter controls** to find the products that you want.
- 4. In the list, mark the checkbox of any product you want to feature as a related product.

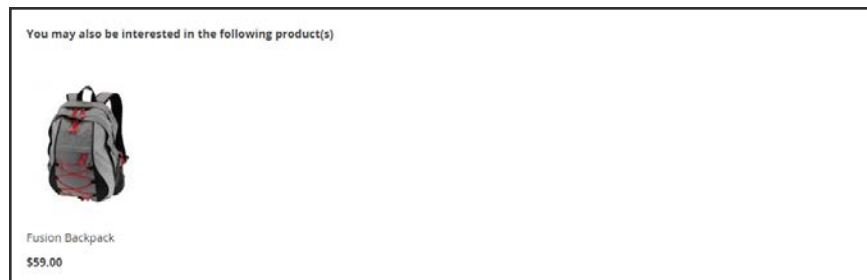


Related Products

- 5. When complete, tap **Add Selected Products**.


## Up-sells

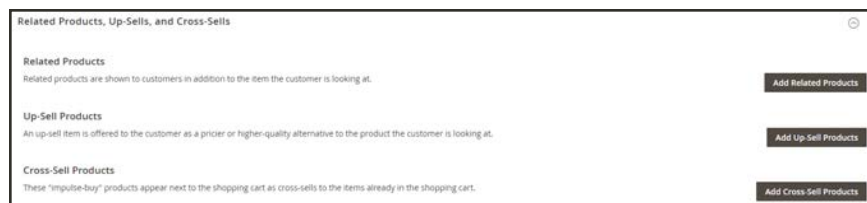
Up-sell products are items that your customer might prefer instead of the product currently considered. An item offered as an up-sell might be of a higher quality, more popular, or have better profit margin. Up-sell products appear on the product page under a heading such as, “You may also be interested in the following product(s).”



*Upsell*

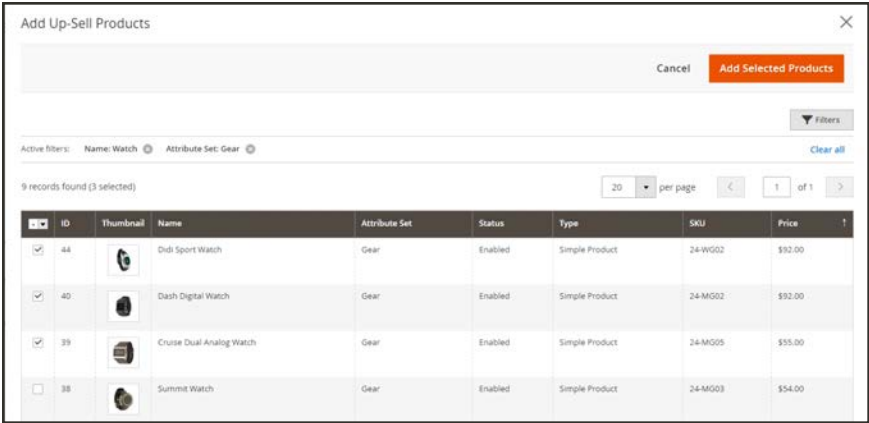
### To select up-sell products:

1. Open the product in edit mode.
2. Scroll down and expand  the **Related Products, Up-Sells, and Cross-Sells** section. Then, tap **Add Up-Sell Products**.



3. Use the **filter controls** to find the products that you want.

- 4. In the list, mark the checkbox of any product you want to feature as an up-sell product.



Upsell Products

- 5. When complete, tap **Add Selected Products**.


Cross-sells

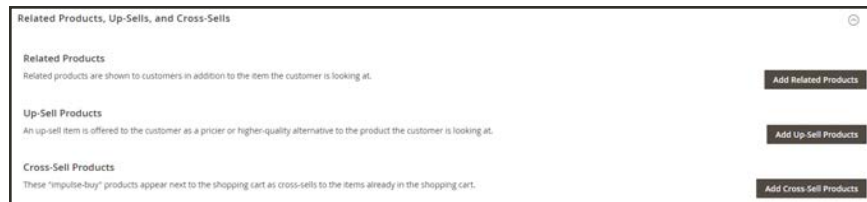
Cross-sell items are similar to impulse purchases positioned next to the cash register in the checkout line. Products offered as a cross-sell appear on the shopping cart page, just before the customer begins the checkout process.



Cross-sells in Shopping Cart

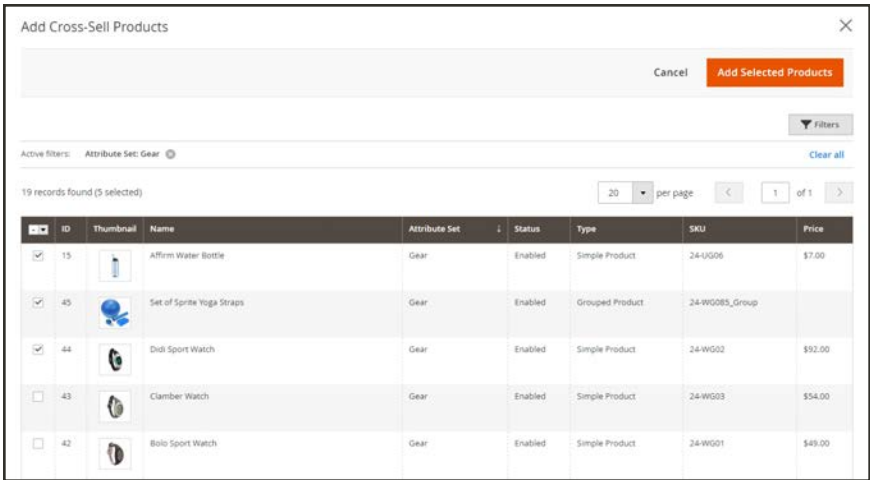
### To select cross-sell products:

1. Open the product in edit mode.
2. Scroll down and expand  the **Related Products, Up-Sells, and Cross-Sells** section. Then, tap **Add Cross-Sell Products**.



3. Use the **filter controls** to find the products that you want.

- 4. In the list, mark the checkbox of any product you want to feature as a cross-sell product.



Cross-sell Products


- 5. When complete, tap **Add Selected Products**.



## Customizable Options

Adding customizable options to a product is an easy way to offer customers a selection of options with a variety of text, selection, and date input types. Customizable options are a good solution if your inventory needs are simple. However, because they are based on variations of a single SKU, they cannot be used to manage stock. If you have multiple products with the same options, you can set up one product, and import the options to the other products.

### To create customizable options:

1. Open the product in edit mode.
2. Scroll down and expand  the **Customizable Options** section. Then, tap **Add Option**.



*Customizable Options*

3. In the upper-left corner, tap **New Option**. Then, do the following:
  - a. In the **Option Title** field, enter a name for the option.
  - b. Set the **Option Type** for data entry.
  - c. If the option is not required to purchase the product, clear the **Required** checkbox.



*New Option*

4. Tap **Add New Row**. Then, complete the following:

### Add Value

- a. In the **Title** field, enter a name for this option.
- b. In the **Price** field, enter any markup or markdown from the base product price that applies to this option.
- c. Set **Price Type** to one of the following:
 

Fixed	The price of the variation differs from the price of the base product by a fixed monetary amount, such as \$1.
Percentage	The price of the variation differs from the price of the base product by a percentage, such as 10%.
- d. Enter a **SKU** for the option. The option SKU is a suffix that is added to the product SKU.
- e. To change the order of the options, tap the **Change Order** icon , and drag the option to a new position in the list.

### Change Order of Options

- f. Repeat this step for each option to be added.
5. When complete, tap **Save**.

## To import customizable options:

1. In the Customizable Options section, tap **Import Options**.



### *Customizable Options*

2. All products with customizable options appear in the grid.
3. In the list, mark the checkbox of the product with the options that you want to import.
4. Tap **Import**.
5. When complete, you can continue to add more custom options, or tap **Save and Close**.

## Input Controls

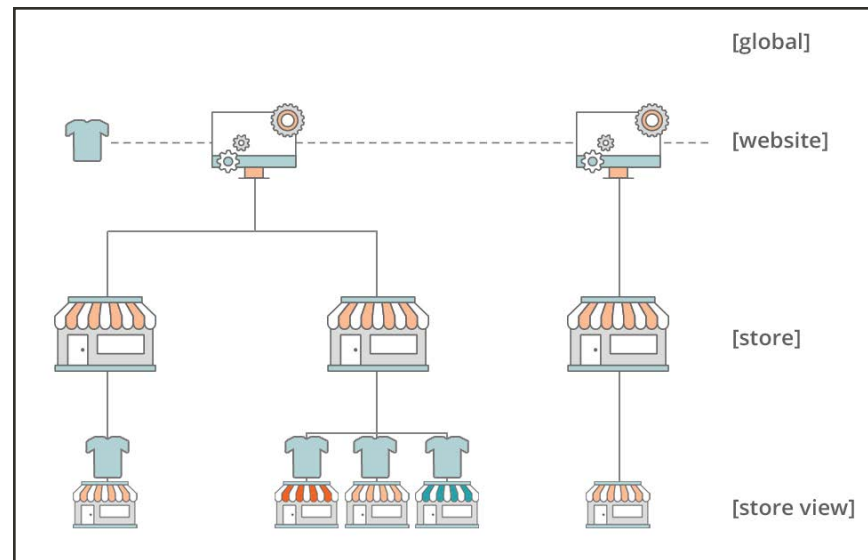
INPUT TYPE	DESCRIPTION	
TEXT		
	Field	A single line input field for text.
	Area	A multiple-line input box for paragraphs of text. You can use the WYSIWYG Editor to format the text with HTML tags, or type HTML directly into the text area.
FILE		
	File	A file to be uploaded by the customer.
SELECT		
	Drop-down	A drop-down list of options. Only one item can be selected at a time.
	Radio Buttons	A set of options that allows only one to be selected at a time.

**Input Controls (cont.)**

INPUT TYPE		DESCRIPTION
	Checkbox	A checkbox is a variation of a yes/no option. If the product has more than one checkbox, multiple selections can be made at the same time.
	Multiple Select	A drop-down list of options that accepts multiple selections. To select multiple options, hold down the Ctrl (PC) or Command (Mac) key.
<b>DATE</b>		
Date	Date	An input field for a date value. The date can be typed directly into the field, selected from a list or calendar. The method of input used and format of the date is determined by the <b>Date &amp; Time Custom Options</b> configuration.
	Date & Time	An input field for date and time values.
	Time	An input field for a time value.


## Product in Websites

The Product in Websites section identifies each website where the product is available, according to the **store hierarchy**.



*Multisite Installation*

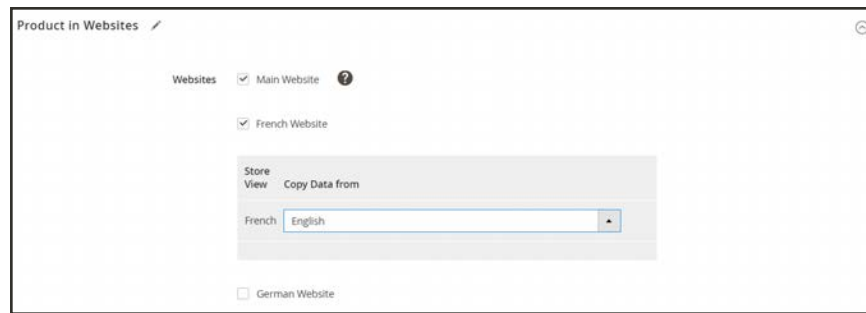
### To copy a product to a different website:

1. Open the product in edit mode.
2. Scroll down and expand  the **Product in Websites** section.



*Product in Websites*

3. Mark the checkbox of the website where the product is to be copied  
For an single website installation, the website checkbox is marked by default.
4. Choose the **Store View** where the product is to be copied from.

*Product in Websites*

5. When complete, tap **Save**. Then, do the following:
  - a. When you return to the product record, set the **Store View** chooser to the store view to which the product was copied. When prompted to confirm scope switching, tap **OK**.
  - b. Enter the **Price** of the product for this store view.

Because the scope of the base currency is set to "website," it is possible to sell the product for a different price in each website.

6. When complete, tap **Save**.

# Design

The Design settings give you the ability to apply a different theme to the product page, change the column layout, determine where product options appear, and enter custom XML code.



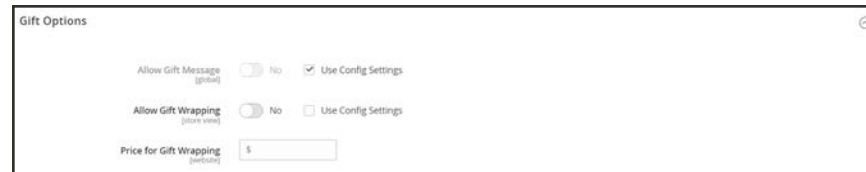
Design

## Field Descriptions

FIELD	SCOPE	DESCRIPTION
Theme	Store View	Gives you the ability to apply a different theme to the product. Options: (All available themes)
Layout	Store View	Gives you the ability to apply a different layout to the product page. Options:
		No layout updates      This option is preselected by default and does not apply layout changes.
		Empty      This option lets you define your own layout, such as a 4-column page. Requires an understanding of XML.
		1 column      Applies the 1-column layout.
		2 columns with left bar      Applies the 2 column layout.
		2 columns with right bar      Applies the 2-columns with right bar layout.
Display product options in	Store View	Options: Product Info Column / Block after Info Column
Layout Update XML	Store View	Add XML code to customize the theme.

## Gift Options

Gift Options can be set at the product level to allow a gift message to be included during checkout. To override the default configuration setting, clear the Use Config Settings checkbox.


The screenshot shows a 'Gift Options' configuration panel. It contains three settings: 'Allow Gift Message' with a toggle set to 'No' and a checked 'Use Config Settings' checkbox; 'Allow Gift Wrapping' with a toggle set to 'No' and an unchecked 'Use Config Settings' checkbox; and 'Price for Gift Wrapping' with a text input field containing a dollar sign and a cursor.

*Gift Options*

### To set gift options for a single product:

1. Open the product in edit mode.

Scroll down and expand  the **Gift Options** section. Then, do the following:

- a. To override the default setting, clear the **Use Config Settings** checkbox.
  - b. Set **Allow Gift Message** as needed for the product.
  - c. Set **Allow Gift Wrapping** as needed for the product.
  - d. If applicable, enter the **Price for Gift Wrapping**.
2. When complete, tap .



# Downloadable Information

The Downloadable Information section is used to generate the links to downloadable products and samples. To learn more, see: [Downloadable Product](#).

Downloadable Information

☒ is this downloadable Product?

Links

Title

(store view)

Links

(group)

☐ Links can be purchased separately

Title	Price	File	Sample	Shareable	Max. Downloads
<div>Add Link</div>					

Alphanumeric, dash and underscore characters are recommended for filenames. Improper characters are replaced with '\_'.  
Samples

Title

(store view)

Samples

Title	File
<div>Add Link</div>	

Alphanumeric, dash and underscore characters are recommended for filenames. Improper characters are replaced with '\_'.

Downloadable Information

Magento Commerce User Guide

cclviii

# Grouped Products




The Grouped Products section is used to add individual products to a **Grouped** product. After the products are added, they appear in the section.

Grouped Products

A grouped product is made up of multiple, standalone products that are presented as a group. You can offer variations of a single product, or group them by season or theme to create a coordinated set. Each product can be purchased separately, or as part of the group.

Add Products to Group

< 1 of 1 >

ID	Thumbnail	Name	Attribute Set	Status	SKU	Price	Default Quantity	Actions
33		Sprite Yoga Strap 6 foot	Sprite Yoga Strap	Enabled	24-WG085	\$14.00	<input type="text" value="0.0000"/>	<a href="#">Remove</a>
34		Sprite Yoga Strap 8 foot	Sprite Yoga Strap	Enabled	24-WG086	\$17.00	<input type="text" value="0.0000"/>	<a href="#">Remove</a>
35		Sprite Yoga Strap 10 foot	Sprite Yoga Strap	Enabled	24-WG087	\$21.00	<input type="text" value="0.0000"/>	<a href="#">Remove</a>

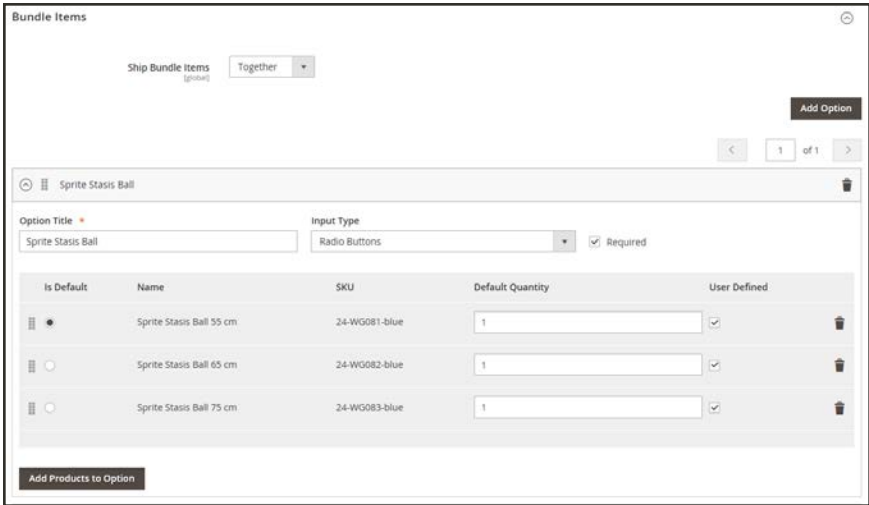
Grouped Product Items

## Bundle Items

The Bundle Items section is used to add items to a **Bundle** product type, and also to edit the current selection of items.



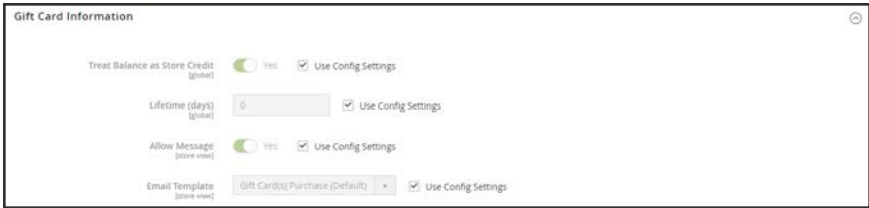
Bundle Items Section



Bundle Items

## Gift Card Information

The Gift Card Information section can be used to override the **configuration** settings that determine how the card is managed.



Gift Card Information





## CHAPTER 14:

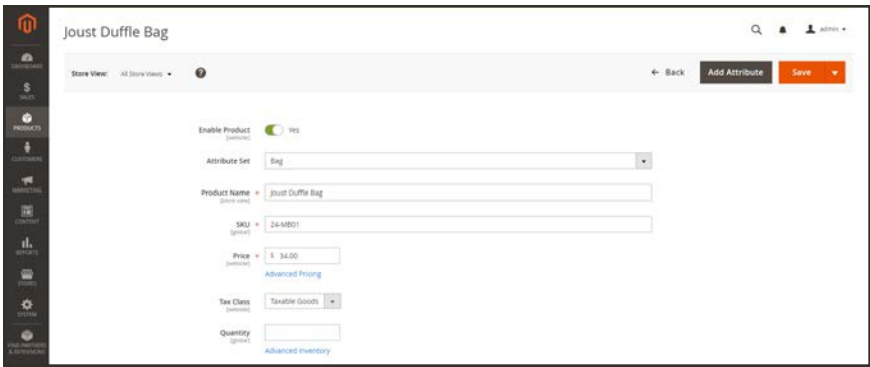
# Managing Pricing

Magento supports a number of pricing options that you can use for promotions, or to meet the minimum advertised pricing requirements of the manufacturer. Changes to product pricing can be made on schedule, or by price rule that is applied at the product level or in the shopping cart. Topics in this chapter:

- [Advanced Pricing](#)
- [Group Price](#)
- [Special Price](#)
- [Tier Price](#)
- [Minimum Advertised Price](#)

# Advanced Pricing

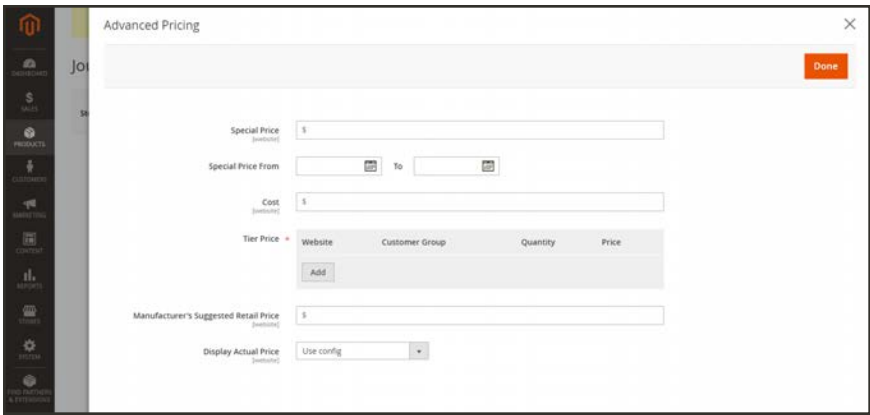
The Advanced Pricing settings define the required conditions for special pricing based on the customer group and website, and also determine quantity discount tier pricing.



Advanced Pricing

## To display the Advanced Pricing options:

- 1. Open the product in edit mode.
- 2. Under the **Price** field, click **Advanced Pricing**.




Advanced Pricing

## Field Descriptions

FIELD	DESCRIPTION								
Group Price	<p>Sets up promotional prices for specific customer groups within the selected website. Options include:</p> <table> <tr> <td>Web Site</td><td>Identifies the website where the group price rule applies. This option appears only if the installation has multiple websites.</td></tr> <tr> <td>Customer Group</td><td>(Required) Identifies the customer group that qualifies to receive the group price.</td></tr> <tr> <td>Price</td><td>(Required) Specifies the product price for members of the customer group, within the specific website.</td></tr> <tr> <td>Action</td><td>Deletes the current Group Price rule.</td></tr> </table>	Web Site	Identifies the website where the group price rule applies. This option appears only if the installation has multiple websites.	Customer Group	(Required) Identifies the customer group that qualifies to receive the group price.	Price	(Required) Specifies the product price for members of the customer group, within the specific website.	Action	Deletes the current Group Price rule.
Web Site	Identifies the website where the group price rule applies. This option appears only if the installation has multiple websites.								
Customer Group	(Required) Identifies the customer group that qualifies to receive the group price.								
Price	(Required) Specifies the product price for members of the customer group, within the specific website.								
Action	Deletes the current Group Price rule.								
<div>Add Group Price</div>	Inserts an additional row for a new Group Price rule								
Special Price	<p>Offers a discounted price during the time period defined by the From/To dates.</p> <p>In the storefront when a special price is available, the retail price is crossed out and the special price appears below in large, bold text.</p> <table> <tr> <td>From</td><td>Sets the first date the Special Price is available. You can either enter the date or select it from the calendar.</td></tr> <tr> <td>To</td><td>Sets the last date the Special Price is available. You can either enter the date or select it from the calendar.</td></tr> </table>	From	Sets the first date the Special Price is available. You can either enter the date or select it from the calendar.	To	Sets the last date the Special Price is available. You can either enter the date or select it from the calendar.				
From	Sets the first date the Special Price is available. You can either enter the date or select it from the calendar.								
To	Sets the last date the Special Price is available. You can either enter the date or select it from the calendar.								
Cost	The actual cost of the item.								
Tier Price	<p>Offers a quantity discount to members of a specific customer group and website. Options include:</p> <table> <tr> <td>Web Site</td><td>Identifies a specific website where the tier price rule applies.</td></tr> <tr> <td>Customer Group</td><td>Identifies a specific customer group that qualifies to receive the tier price discount.</td></tr> <tr> <td>Quantity</td><td>(Required) The quantity that must be purchased to receive the tier price.</td></tr> </table>	Web Site	Identifies a specific website where the tier price rule applies.	Customer Group	Identifies a specific customer group that qualifies to receive the tier price discount.	Quantity	(Required) The quantity that must be purchased to receive the tier price.		
Web Site	Identifies a specific website where the tier price rule applies.								
Customer Group	Identifies a specific customer group that qualifies to receive the tier price discount.								
Quantity	(Required) The quantity that must be purchased to receive the tier price.								

**Field Descriptions (cont.)**

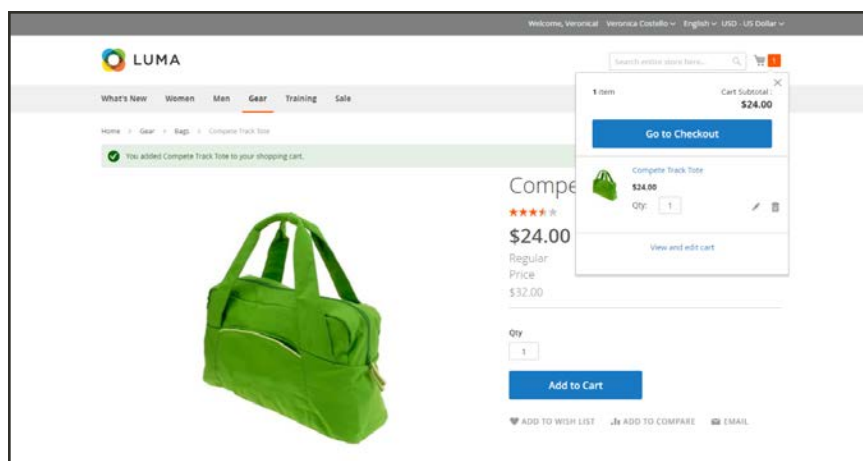
FIELD	DESCRIPTION								
Price	(Required) The discounted product price for the quantity purchased.								
	Deletes the current tier price rule.								
<div>Add</div>	Inserts an additional row for a new tier price rule definition.								
Manufacturer's Suggested Retail Price	The manufacturer's suggested retail price (MSRP) for the product.								
Display Actual Price	<p>Determines where the actual price of the product is visible to the customer. Options:</p> <table> <tr> <td data-bbox="662 785 889 856">Use Config</td><td data-bbox="889 785 1458 856">Uses the current configuration setting for the price display.</td></tr> <tr> <td data-bbox="662 877 889 989">On Gesture</td><td data-bbox="889 877 1458 989">Displays the actual product price in a popup, in response to the "Click for price" or "What's this?" link.</td></tr> <tr> <td data-bbox="662 1010 889 1081">In Cart</td><td data-bbox="889 1010 1458 1081">Displays the actual product price in the shopping cart.</td></tr> <tr> <td data-bbox="662 1102 889 1194">Before Order Confirmation</td><td data-bbox="889 1102 1458 1194">Displays the actual product price at the end of the checkout process, just before the order is submitted.</td></tr> </table>	Use Config	Uses the current configuration setting for the price display.	On Gesture	Displays the actual product price in a popup, in response to the "Click for price" or "What's this?" link.	In Cart	Displays the actual product price in the shopping cart.	Before Order Confirmation	Displays the actual product price at the end of the checkout process, just before the order is submitted.
Use Config	Uses the current configuration setting for the price display.								
On Gesture	Displays the actual product price in a popup, in response to the "Click for price" or "What's this?" link.								
In Cart	Displays the actual product price in the shopping cart.								
Before Order Confirmation	Displays the actual product price at the end of the checkout process, just before the order is submitted.								



## Group Price

A discounted price on any product can be extended to members of a specific customer group, provided they shop while logged in to their accounts. The discounted price appears on the product page with the regular price noted below, and replaces the regular price in the shopping cart.

Customer group prices are a component of tier pricing, and are set up in a similar way. The only difference is that the customer group prices have a quantity of 1.



*Group Price Discount*

### To set up a group price:

1. Open the product in edit mode.
2. Below the **Price** field, click **Advanced Pricing**.
3. In the **Tier Price** section, tap **Add**. Then, do the following:
  - a. If your Magento installation includes multiple **Websites**, choose the one(s) where the group price applies.
  - b. Choose the **Customer Group** that is to receive the discount.
  - c. Enter a quantity of 1.
  - d. Enter the discounted **Price**.

Advanced Pricing

Special Price

Special Price From  To

Cost

Manufacturer's Suggested Retail Price

Display Actual Price

Website	Customer Group	Quantity	Price
All websites (USD)	General	1	\$ 24.00

Add


Done

Save

*Group Price*

4. To add another group price tap **Add** and repeat the previous steps.
5. When complete, tap **Done**. Then, tap **Save**.

Shopping Cart

Item	Price	Qty	Subtotal
 Complete Track Tote	\$24.00	1	\$24.00

Gift options  Move to Wishlist

Update Shopping Cart

Summary

Estimate Shipping and Tax

Subtotal	\$24.00
Shipping (Flat Rate - Fixed)	\$5.00
Tax	\$1.98
<b>Order Total</b>	<b>\$30.98</b>

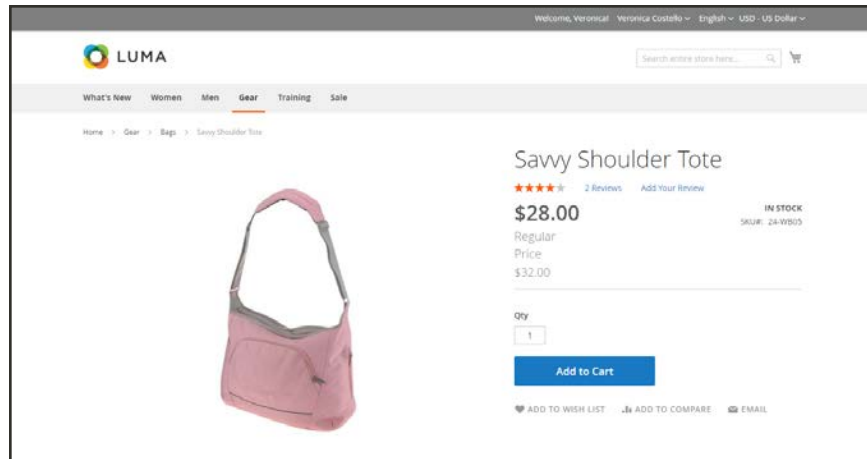
Proceed to Checkout

Check Out with Multiple Addresses

*Group Price Applied in Shopping Cart*

## Special Price

A special price can be offered during a period of time as a **Scheduled Update**. During the specified time period, the special price appears instead of the regular price, followed by “was (previous price).”



*Special Price*

### To apply a special price:

1. Open the product in edit mode.
2. Tap **Scheduled Update**. Then, do the following:
  - a. In the **Update Name** field, enter a name for the special price promotion.
  - b. Enter a brief **Description**.
  - c. Use the **Calendar** (📅) to choose the **Start Date** and **End Date** for the special price promotion. Use the **Hour** and **Minute** sliders to choose the start and end time, as well. Then, tap **Close**.

*Save as New Update*

- d. Scroll down to the **Price** field, and click **Advanced Pricing**. Then, enter the amount of the **Special Price**.

*Special Pricing Settings*

3. When complete, tap **Done**. Then, tap **Save**.

The Scheduled Change appears at the top of the page.

Scheduled Changes

Schedule New Update

Oct 27, 2017

12:00 AM

Start

Watch Special

Oct 31, 2017

11:59 PM

End

Aim Analog Watch 15% discount special

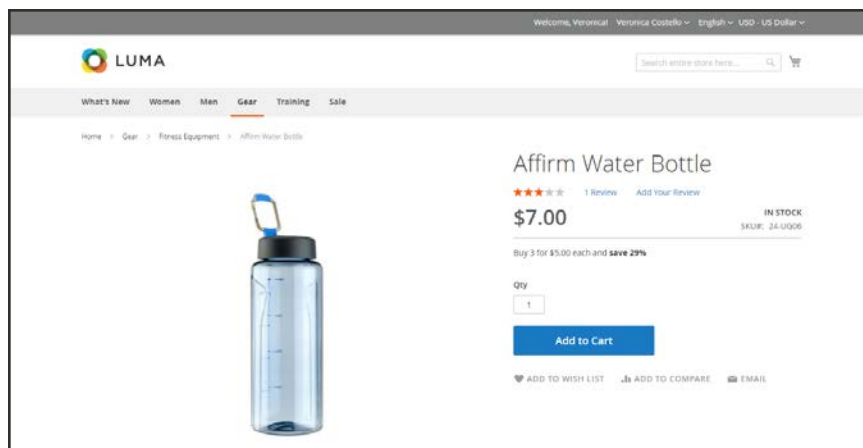
View/Edit

Preview

*Scheduled Change*

## Tier Price

Tier pricing lets you offer a quantity discount from the catalog list and product detail pages. The discount can be applied to a specific store view or customer group.



*Tier Price on Product Page*

The product page calculates the quantity discount and displays a message such as:

Buy 3 for \$5.00 each and save 29%

The prices in the storefront take precedence from the highest to the lowest quantity. Therefore, if you have a tier for the quantity 5 and one for the quantity 10, and a customer adds 5, 6, 7, 8 or 9 items to the shopping cart, the customer receives the discounted price that you specified for the quantity 5 tier. As soon as the customer adds the 10th item, the discounted price specified for the quantity 10 tier supersedes the tier for a quantity of 5, and discounted price for 10 applies.

### To set up a tier price:

1. Open the product in edit mode.
2. Below the **Price** field, click **Advanced Pricing**.
3. In the Tier Price section, tap **Add**. Then, do the following:

The screenshot shows the 'Advanced Pricing' configuration window. It includes the following fields and sections:

- Special Price**: A text input field with a dollar sign prefix.
- Special Price From**: A range selector with 'From' and 'To' fields, each with a calendar icon.
- Cost**: A text input field with a dollar sign prefix.
- Tier Price**: A section with a table:
 

Website	Customer Group	Quantity	Price
All Websites (USD)	ALL GROUPS	5	\$ 5.00

 Below the table is an 'Add' button.
- Manufacturer's Suggested Retail Price**: A text input field with a dollar sign prefix.
- Display Actual Price**: A dropdown menu currently set to 'Use config'.
- Done**: An orange button in the top right corner.

### *Tier Pricing*

- a. If your store has multiple websites, choose the **Website** where the tier pricing applies.
- b. If applicable, choose the **Customer Group** to receive the discount.
- c. In the **Qty** field, enter the quantity that must be ordered to receive the tier price.
- d. In the **Item Price** field, enter the adjusted price of the item.

To apply the same tier to more than one group, create a separate tier for each group, but with the same Qty and Price information.

4. To add another group price, tap **Add** and repeat the previous steps.
5. When complete, tap **Done**. Then, tap **Save**.

## Minimum Advertised Price

Merchants are sometimes prohibited from displaying a price that is lower than the manufacturer's suggested retail price (MSRP). Magento's Minimum Advertised Price (MAP) gives you the ability to remain in compliance with the manufacturer's requirements while offering your customers a better price. Because requirements differ from one manufacturer to another, you can configure your store to prevent the display of your actual price on pages where it is not allowed to appear according to the terms of the manufacturer.

### MAP Logic

For products with prices that depend on a selected options, (such as custom options, or simple products with their own SKUs and stock management), the following logic is used:

- MAP is applied to the main price. The prices of options, bundle items, and associated products (which add or subtract from the main price) appear normally.
- If a product does not have a main price, and its price is derived from the associated product prices (such as in a grouped product), the MAP settings of the associated products are applied.
- If a product in the cart has the Manufacturer's Suggested Retail Price (MSRP) specified, the price is not crossed-out.

For other price settings, the following MAP logic is used:

- If tier pricing is set, the tier price appears according to the Display Actual Price setting.
- If a special price is set, it is considered to be the actual price for MAP.

In the order management and customer management tools, as well as in the reports sections of the Admin, only the actual price appears.

## Using MAP with Product Types

PRODUCT TYPE	DESCRIPTION
Simple, Virtual	The actual price does not automatically appear on catalog list and product pages, but is included only according to the Display Actual Price setting. Custom option prices appear normally.
Grouped	The prices of associated simple products do not automatically appear on catalog list and product pages, but are included only according to the Display Actual Price setting.
Configurable	The actual price does not automatically appear on catalog list and product pages, but is included only according to the Display Actual Price setting. Option prices appear normally.
Bundle (with fixed price)	<p>The actual price does not automatically appear on catalog pages, but is included only according to the Display Actual Price setting. The prices of bundle items appear normally.</p> <div> <p>MAP is not available for <b>bundle products</b> with dynamic pricing.</p> </div>
Downloadable	The actual price does not automatically appear on catalog list and product pages, but is included only according to the Display Actual Price setting. The price associated with each download link appears normally.

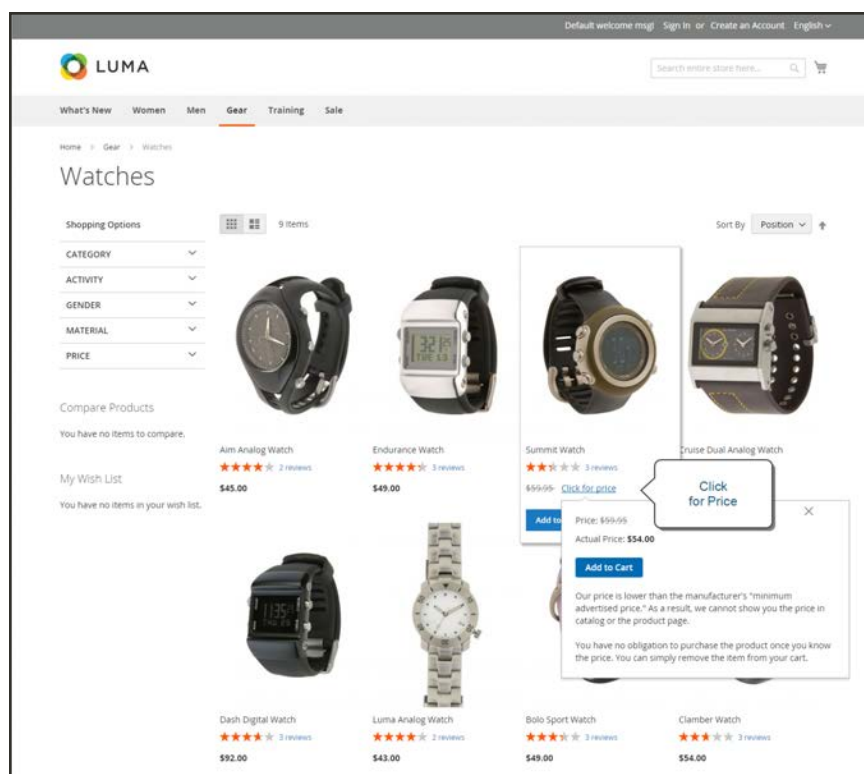
## Using MAP with Price Settings

PRICE SETTING	DESCRIPTION
Tier Price	<p>If tier pricing is set, the tier pricing message is not displayed in the catalog. On the product page a notification is displayed that indicates that the price can be lower when ordering more than a certain quantity, but the discount is displayed in percentages only. For associated products of a grouped product, the discounts are not displayed on the product page.</p> <p>The tier price is shown according to the Display Actual Price setting.</p>
Special Price	If the Special price is specified, the special price is displayed according to the Display Actual Price setting.



## Configuring MAP

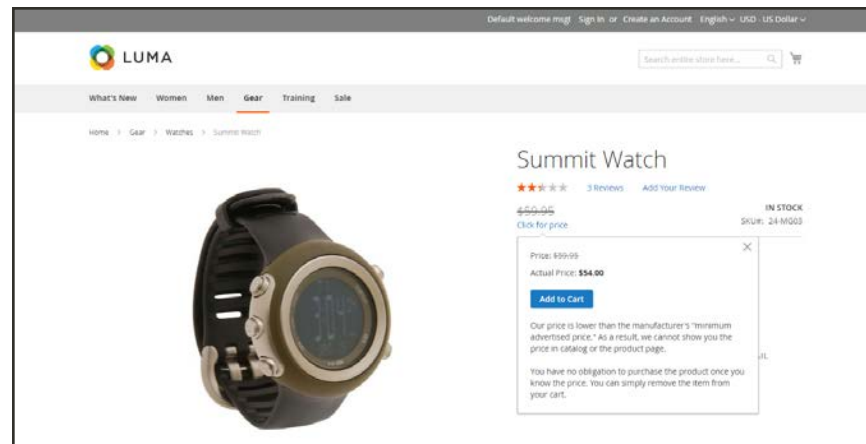
Your store's MAP settings can be applied to all products in your catalog, or configured for specific products. When Minimum Advertised Price is enabled globally, all product prices in the storefront are hidden from view. There are a variety of configuration options that you can use to remain in compliance with the terms of your agreement with the manufacturer, while still offering your customers a better price.



*Actual Price Appears “On Gesture”*

On the global level, you can enable or disable MAP, apply it to all products, define how the actual price is displayed, and edit the text of the related messages and information tips that appear in the store.

When MAP is enabled, the product-level MAP settings become available. You can apply MAP to an individual product by entering the MSRP, and choosing how you want the actual price to appear in the store. Product-level MAP settings override the global MAP settings.



*Click for Price*

### To configure MAP:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. If applicable, in the upper-right corner, set **Store View** to the view where the configuration applies.
3. In the panel on the left under **Sales**, choose **Sales**.
4. Expand ☑ the **Minimum Advertised Price** section.
5. If necessary, set **Enable MAP** to “Yes.” Then, do the following:

Minimum Advertised Price	
Enable MAP <small>(website)</small>	<div>Yes</div> <div><b>Warning!</b> Enabling MAP by default will hide all product prices on Storefront.</div> <div><input type="checkbox"/> Use system value</div>
Display Actual Price <small>(website)</small>	<div>On Gesture</div> <div><input checked="" type="checkbox"/> Use system value</div>
Default Popup Text Message <small>(store view)</small>	<div>Our price is lower than the manufacturer's "minimum advertised price." As a result, we cannot show you the price in catalog or the product page. &lt;br /&gt;&lt;br /&gt; You have no obligation to purchase the product once you know the price. You can simply remove the item from your cart.</div> <div><input checked="" type="checkbox"/> Use system value</div>
Default "What's This" Text Message <small>(store view)</small>	<div>Our price is lower than the manufacturer's "minimum advertised price." As a result, we cannot show you the price in catalog or the product page. &lt;br /&gt;&lt;br /&gt; You have no obligation to purchase the product once you know the price. You can simply remove the item from your cart.</div> <div><input checked="" type="checkbox"/> Use system value</div>

*Minimum Advertised Price*

### Method 1: Configure MAP for All Products:

1. To determine when and where you want the actual price to be visible to customers, do the following:
  - a. To change the default value, clear the **Use system value** checkbox.
  - b. Set **Display Actual Price** to one of the following:
    - In Cart
    - Before Order Confirmation
    - On Gesture (on click)
2. Enter the text that you want to appear in the **Default Popup Text Message**.
3. Enter any additional explanation that you want to appear in the **Default “What’s This” Text Message**.
4. When complete, tap **Save Config**.

### Method 2: Configure MAP for a Single Product

1. On the Admin sidebar, tap **Products**. Then under **Inventory**, choose **Catalog**.
2. Open the product in **Edit** mode.
3. In the panel on the left under **Advanced Settings**, choose **Advanced Pricing**. Then, do the following:

The screenshot shows the 'Advanced Pricing' configuration panel. It includes the following elements:

- Special Price:** A text input field with a dollar sign icon.
- Special Price From:** A text input field with a calendar icon.
- To:** A text input field with a calendar icon.
- Cost:** A text input field with a dollar sign icon.
- Tier Price:** A table with columns: Website, Customer Group, Quantity, and Price. Below the table is an 'Add' button.
- Manufacturer's Suggested Retail Price:** A text input field with a dollar sign icon.
- Display Actual Price:** A dropdown menu currently set to 'On Gesture'.

*Manufacturer's Suggested Retail Price*

- a. Enter the **Manufacturer's Suggested Retail Price**.

In this example, the product price is \$54.00, and the MSRP is 59.95.

- b. Set **Display Actual Price** to one of the following:

Use config	(Default) Applies the MAP configuration setting.
On Gesture	Displays the actual product price in a popup when the customer clicks the “Click for price” or “What’s this?” link.
In Cart	Displays the actual product price in the shopping cart.
Before Order Confirmation	Displays the actual product price at the end of the checkout process, just before the order is confirmed.

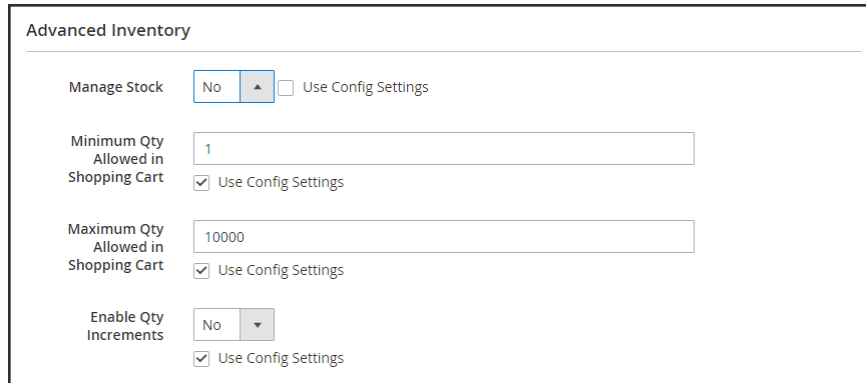
The Manufacturer's Suggested Retail Price and Display Actual Price fields appear only when **Minimum Advertised Price** is enabled in the configuration.

6. When complete, tap **Done**. Then, tap **Save**.

## CHAPTER 15:

# Managing Inventory

Each product in your catalog has both a short and long version of the Advanced Inventory options, depending on whether you want to manage stock for the product. The long form appears when Manage Stock is set to “Yes.” The initial values reflect the default **Product Stock Options** set in the configuration.



The screenshot shows the 'Advanced Inventory' configuration panel. It contains four sections: 'Manage Stock' with a dropdown set to 'No' and an unchecked 'Use Config Settings' checkbox; 'Minimum Qty Allowed in Shopping Cart' with a text input set to '1' and a checked 'Use Config Settings' checkbox; 'Maximum Qty Allowed in Shopping Cart' with a text input set to '10000' and a checked 'Use Config Settings' checkbox; and 'Enable Qty Increments' with a dropdown set to 'No' and a checked 'Use Config Settings' checkbox.

*Advanced Inventory (Short Form)*

### Method 1: Without Stock Management

1. Open the product in edit mode.
2. In the panel on the left under **Advanced Settings**, choose **Advanced Inventory**.
3. Set **Manage Stock** to “No.” If necessary, clear the **Use Config Settings** checkbox to make the field available.
4. Enter the **Minimum Qty Allowed in Shopping Cart**.
5. Enter the **Maximum Qty Allowed in Shopping Cart**.
6. If you want to sell by quantity increment, do the following:
  - a. Set **Enable Qty Increments** to “Yes.”
  - b. In the **Qty Increments** field, enter the number of products that must be purchased in an incremental step. For example, if you enter 6, the customer must purchase the product in quantities of 6, 12, 18, and so on.
7. When complete, tap **Save**.

## Field Descriptions

FIELD	SCOPE	DESCRIPTION
Manage Stock	Global	Determines if inventory control is used to manage this product in your catalog. Options: Yes / No
Minimum Qty Allowed in Shopping Cart	Global	Determines the minimum number of the product that can be purchased in a single order.
Maximum Qty Allowed in Shopping Cart	Global	Determines the maximum number of the product that can be purchased in a single order.
Enable Qty Increments	Global	Determines if the product can be sold in quantity increments. Options: Yes / No
Qty Increments	Global	<p>Enter the number of products that must be purchased at the same time. For example, if set to 6, the customer must purchase a quantity of 6, 12, 18, and so on.</p> <p>When a product is sold in quantity increments, the number appears in the upper-right corner, next to the shopping cart link. If the customer tries to purchase the product in any other quantity, a message appears in the shopping cart,</p>

## Method 2: With Stock Management

1. Open the product in edit mode.
2. In the panel on the left under **Advanced Settings**, choose **Advanced Inventory**.
3. Set **Manage Stock** to “Yes.” If necessary, clear the **Use Config Settings** checkbox to make the field available. Then, do the following:
  - a. Enter the **Qty** currently in stock.
  - b. Enter the **Qty for Item’s Status to Become Out of Stock**.
  - c. Enter the **Minimum Qty Allowed in Shopping Cart**.
  - d. Enter the **Maximum Qty Allowed in Shopping Cart**.
4. If the quantity is a decimal value, do the following:
  - a. Set **Qty Uses Decimals** to “Yes.”
  - b. If the quantity purchased **Can be Divided into Multiple Boxes for Shipping**, select “Yes.”
5. Set **Backorders** to one of the following:

- No Backorders
  - Allow Qty Below 0
  - Allow Qty Below 0 and Notify Customer
6. In the **Notify for Quantity Below** field, enter the stock level that triggers a Quantity Below notification.
  7. To sell the product in quantity increments, do the following:
    - a. Set **Enable Qty Increments** to “Yes.”
    - b. In the **Qty Increments** field, enter the number of products that must be purchased in an incremental step. For example, if you enter 6, the customer must purchase the product in quantities of 6, 12, 18, and so on.
  8. If the product is currently in stock, set **Stock Availability** to “In Stock.”
  9. When complete, tap **Save**.

Advanced Inventory

Manage Stock

Yes

Use Config Settings

Qty

100

Qty for Item's Status to Become Out of Stock

0

Use Config Settings

Minimum Qty Allowed in Shopping Cart

1

Use Config Settings

Maximum Qty Allowed in Shopping Cart

10000

Use Config Settings

Qty Uses Decimals

No

Can be Divided into Multiple Boxes for Shipping

No

Backorders

No Backorders

Use Config Settings

Notify for Quantity Below

1

Use Config Settings

Enable Qty Increments

No

Use Config Settings

Stock Availability

In Stock

*Advanced Inventory (Long Form)*

## Field Descriptions

FIELD	SCOPE	DESCRIPTION
Manage Stock	Global	<p>Determines if inventory control is used to manage this product in your catalog. Options:</p> <p>Yes      Displays the long form with all stock management options.</p> <p>No        Display the short form without stock management options.</p>
Qty	Global	The quantity of the item that is currently in stock.
Qty for Item's Status to Become Out of Stock	Global	Determines the stock level at which a product is considered to be out of stock.
Minimum Qty Allowed in Shopping Cart	Global	Determines the minimum number of the product that can be purchased in a single order.
Maximum Qty Allowed in Shopping Cart	Global	Determines the maximum number of the product that can be purchased in a single order.
Qty Uses Decimals	Global	<p>Determines if customers can use a decimal value rather than a whole number when entering the quantity ordered. Options:</p> <p>Yes      Permits values to be entered as decimals, rather than whole numbers, which is suitable for products sold by weight, volume or length.</p> <p>No        Requires quantity values to be entered as whole numbers.</p>
Can be Divided into Multiple Boxes for Shipping	Global	Determines if parts of the product can be shipped separately. Options: Yes / No
Backorders	Global	<p>Determines how backorders are managed. Backorders do not change the processing status of the order. Funds are still authorized or captured immediately when the order is placed, regardless of whether the product is in stock. Products are shipped as they become available. Options:</p>



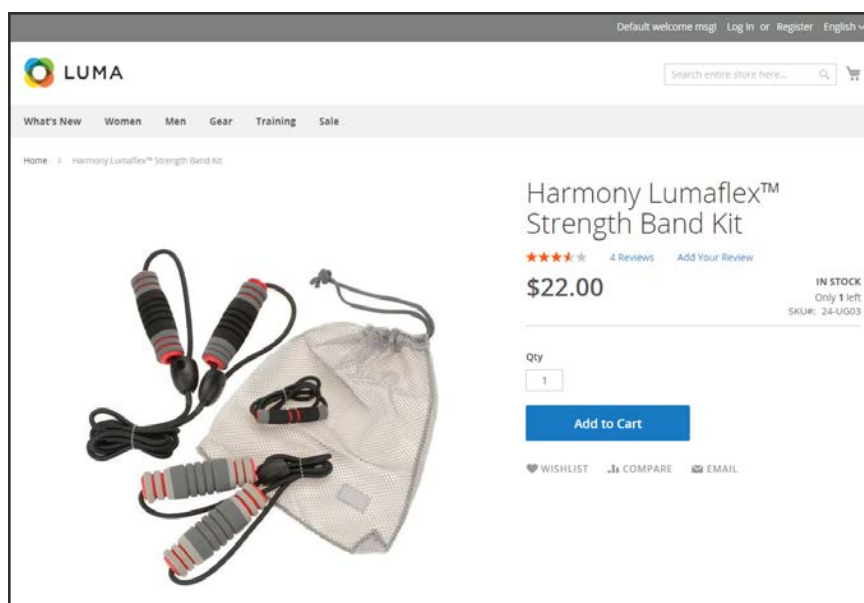
**Field Descriptions (cont.)**

FIELD	SCOPE	DESCRIPTION
		<p>No Backorders Does not accept backorders when product is out of stock.</p> <p>Allow Qty Below 0 Accepts backorders when the quantity falls below zero.</p> <p>Allow Qty Below 0 and Notify Customer Accepts backorders when the quantity falls below zero, but notifies customers that orders can still be placed.</p>
Notify for Quantity Below	Global	Determines the stock level at which notification is sent that the inventory has fallen below the threshold.
Enable Qty Increments	Global	Determines if the product can be sold in quantity increments. Options: Yes / No
Stock Availability	Global	<p>Determines the current availability of the product. Options:</p> <p>In Stock Makes the product available for purchase.</p> <p>Out of Stock Unless Backorders are activated, prevents the product from being available for purchase and removes the listing from the catalog.</p>

## Stock Options

Your catalog can be configured to display the availability of each item as “In Stock” or “Out of Stock.” The configuration setting applies to the catalog as a whole, and the message changes according to the stock status of the product. There are several display variations possible, including how “out of stock” products are managed in the catalog and in product listings.

The out of stock threshold indicates when a product needs to be reordered, and can be set to any number greater than zero. Another way you can use the stock availability threshold is to manage products that are in high demand. If you want to capture new customers, rather than sell to high-quantity buyers, you can set a maximum quantity to prevent a single buyer from taking out your entire inventory.



*In Stock, Only 1 Left*

### To configure stock options:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Inventory**.
3. Expand ☯ the **Stock Options** section, and do the following:
  - a. To return items to stock if an order is canceled, **Set Items' Status to be in Stock When Order in Canceled** to “Yes.”
  - b. To adjust the quantity on hand when an order is placed, set **Decrease Stock When Order is Placed** to “Yes.”
  - c. Set **Display Out of Stock Products** to “Yes” to continue to display products in the catalog that are no longer in stock.

If **price alerts** are enabled, customers can sign up to be notified when the product is back in stock.

- d. To display the message, “Only x left,” enter the number in the **Display X left Threshold** field.

The message begins to appear when the quantity in stock reaches the threshold. For example, if set to 3, the message “Only 3 left” appears when the quantity in stock reaches 3. The message adjusts to reflect the quantity in stock, until the quantity reaches zero.

- e. To display an “In Stock” or “Out of Stock” message on the product page, set **Display Products Availability In Stock on Storefront** to “Yes.”

Stock Options		
Set Items' Status to be In Stock When Order is Cancelled	Yes	[GLOBAL]
Decrease Stock When Order is Placed	Yes	[GLOBAL]
Display Out of Stock Products	No	[GLOBAL]
Products will still be shown by direct product URLs.		
Only X left Threshold	0	[WEBSITE]
Display products availability in stock on Storefront.	Yes	[STORE VIEW]


### Stock Options

4. When complete, tap **Save Config**.

## Product Stock Options

The Product Stock Options configuration determines the default product inventory settings at the product level. The configuration applies to individual products, rather than to the contents of the cart as a whole.

### To configure the default inventory settings:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Inventory**.
3. Expand  the **Product Stock Options** section, and do the following:
  - a. To activate inventory control for your catalog, set **Manage Stock** to “Yes.”

Product Stock Options

Please note that these settings apply to individual items in the cart, not to the entire cart.

Manage Stock

Yes

[GLOBAL]

Changing can take some time due to processing whole catalog.

Backorders

No Backorders

[GLOBAL]

Changing can take some time due to processing whole catalog.

Maximum Qty Allowed in Shopping Cart

10000


[GLOBAL]

Out-of-Stock Threshold

0

[GLOBAL]

Minimum Qty Allowed in Shopping Cart

Customer Group	Minimum Qty	Action
ALL GR	1	

Add

[GLOBAL]

Notify for Quantity Below

1

[GLOBAL]

Enable Qty Increments

No

[GLOBAL]

Automatically Return Credit Memo Item to Stock

No

[GLOBAL]

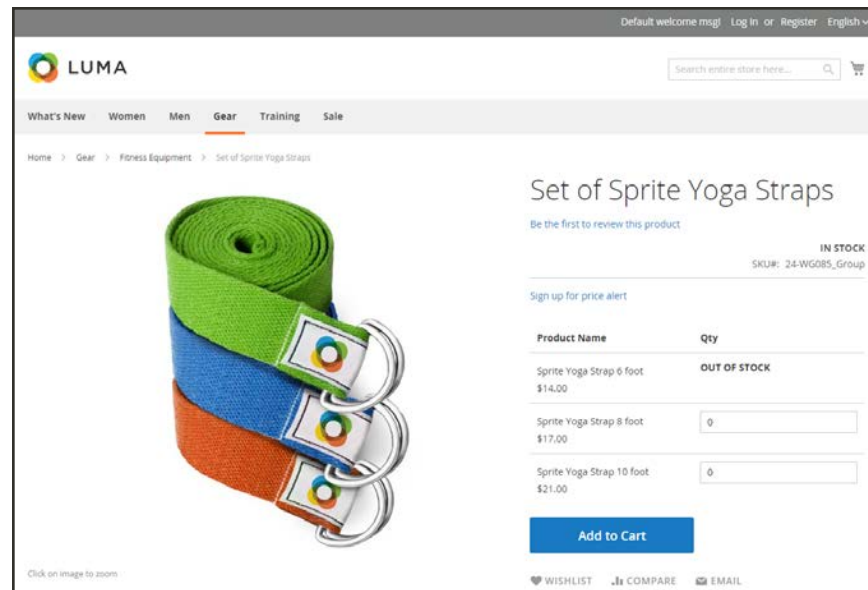
### Product Stock Options

- b.** Set **Backorders** to one of the following:

No Backorders	To not accept backorders when product is out of stock.
Allow Qty Below 0	To accept backorders when the quantity falls below zero.
Allow Qty Below 0 and Notify Customer	To accept backorders when the quantity falls below zero, and notify the customer that the order can still be placed.
  - c.** Enter the **Maximum Qty Allowed in Shopping Cart**.
  - d.** Enter the **Qty for Item's Status to Become Out of Stock**.
  - e.** Enter the **Minimum Qty Allowed in Shopping Cart**.
  - f.** In the **Notify for Quantity Below** field, enter the stock level that triggers notification that the item is out of stock.
  - g.** To activate quantity increments for the product, set **Enable Qty Increments** to “Yes.” Then in the **Qty Increments** field, enter the number of the items that must be purchased to meet the requirement. For example, an item that is sold in increments of 6 can be purchased in quantities of 6, 12, 18, and so on.
  - h.** When a credit memo is issued for the item, set **Automatically Return Credit Memo Item to Stock** to “Yes” if you want to return the item to inventory by default.
- 4.** When complete, tap **Save Config**.

## Stock Message Scenarios

You can use a combination of configuration settings to control stock availability messages on product pages and in listings of products on catalog pages.



*Grouped Product with “Out of Stock” Message*

## Product Page Stock Messages

There are several variations of messaging available for the product page, depending on the combination of Manage Stock and Stock Availability settings.

**Example 1: Show Availability Message**

**Scenario 1:** This combination of settings causes the availability message to appear on the product page, according to the stock availability of each product.

STOCK OPTIONS		MESSAGE
Display product availability in stock in the frontend:	Yes	
<b>Product Inventory</b>		
Manage Stock	Yes	
Stock Availability	In Stock	"Availability: In Stock"
	Out of Stock	"Availability: Out of Stock"

**Scenario 2:** When stock is not managed for a product, this combination of settings can be used to display the availability message on the product page.

STOCK OPTIONS		MESSAGE
Display product availability in stock in the frontend:	Yes	
<b>Product Inventory</b>		
Manage Stock	No	"Availability: In Stock"

**Example 2: Hide Availability Message**

**Scenario 1:** This combination of configuration and product settings prevents the availability message from appearing on the product page.

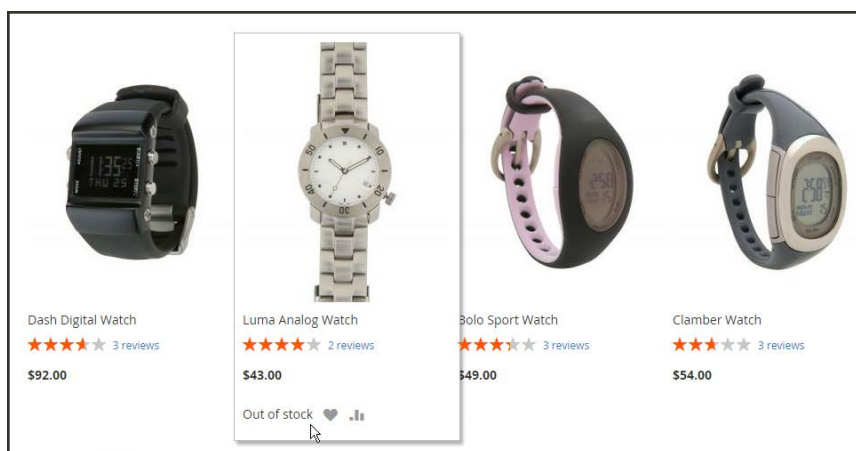
STOCK OPTIONS		MESSAGE
Display product availability in stock in the frontend:	No	
<b>Product Inventory</b>		
Manage Stock	Yes	
Stock Availability	In Stock	None
	Out of Stock	None

**Scenario 2:** When stock is not managed for a product, this combination of configuration and product settings prevents the availability message from appearing on the product page.

STOCK OPTIONS		MESSAGE
Display product availability in stock in the frontend:	No	
Product Inventory		
Manage Stock	No	None

## Catalog Page Stock Messages

The following display options are possible for the category and search results lists, depending on the product availability and configuration settings.



*“Out of Stock” Message on Category Page*



**Example 1: Show Product with “Out of Stock Message”**

This combination of configuration settings includes out of stock products in the category and search results lists, and displays an “out of stock” message.

STOCK OPTIONS		MESSAGE
Display Out of Stock Products	Yes	“Out of stock”
Display product availability in stock in the frontend	Yes	
Display Out of Stock Products	Yes	None
Display product availability in stock in the frontend	No	

**Example 2: Show Product without “Out of Stock Message”**

This combination of configuration settings includes out of stock products in the category and search results lists, but does not display a message.

STOCK OPTIONS		MESSAGE
Display Out of Stock Products	Yes	None
Display product availability in stock in the frontend	No	

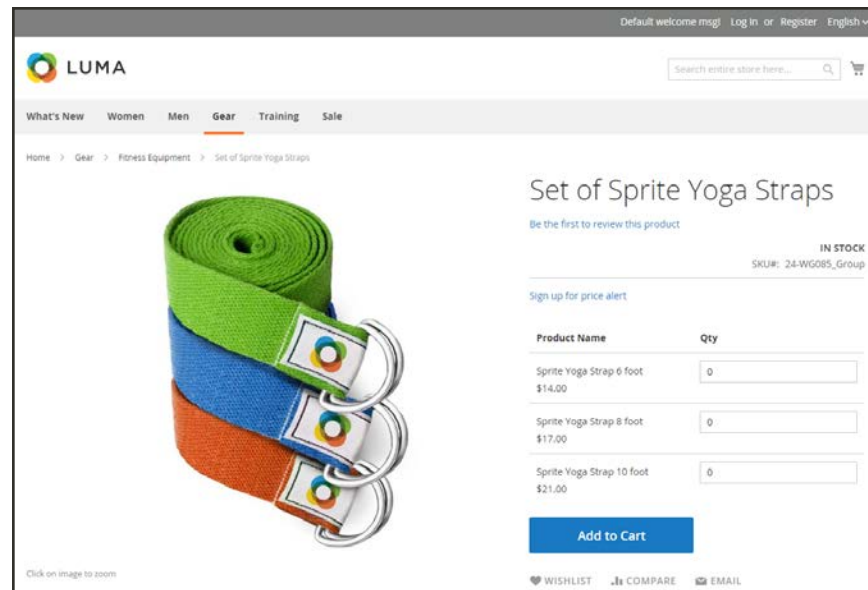
**Example 3: Hide Product Until Back in Stock**

This configuration setting omits out of stock products entirely from the category and search results lists, until they are back in stock.

STOCK OPTIONS		MESSAGE
Display Out of Stock Products	No	None

## Product Alerts

Customers can subscribe to two types of alerts by email: price change alerts and in-stock alerts. For each type of alert, you can determine if customers are able to subscribe, select the email template that is used, and identify the sender of the email.



### *Sign Up for Price Alert*

When price change alerts are enabled, a “Sign up for price alert” link appears on every product page. Customers can click the link to subscribe to alerts related to the product. Guests are prompted to open an account with your store. Whenever the price changes, or the product goes on special, everyone who has signed up to be notified receives an email alert.

The in-stock alert creates a link called “Sign up to get notified when this product is back in stock” for every product that is out of stock. Customers can click the link to subscribe to the alert. When the product is back in stock, customers receive email notification that the product is available. Products with alerts have a Product Alerts tab in the Product Information panel that lists the customers who have subscribed to an alert.

### To set up product alerts:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Catalog**.
3. Click to expand the **Product Alerts** section, and do the following:
  - a. To offer price change alerts to your customers, set **Allow Alert When Product Price Changes** to “Yes.”
  - b. Set **Price Alert Email Template** to the template that you want to use for the price alert notifications.
  - c. To offer alerts when out-of-stock products become available again, set **Allow Alert When Product Comes Back in Stock** to “Yes.”

The “Sign up to get notified when this product is back in stock” message appears only when Inventory Stock Options - Display Out of Stock Products is set to “Yes.”

- d. Set **Stock Alert Email Template** to the template that you want to use for product stock alerts.
- e. Set **Alert Email Sender** to the **store contact** that you want to appear as the sender of the email alert.

The screenshot shows the 'Product Alerts' configuration panel. It contains five rows of settings, each with a label, a dropdown menu, and a link to view the configuration for a specific store or website.

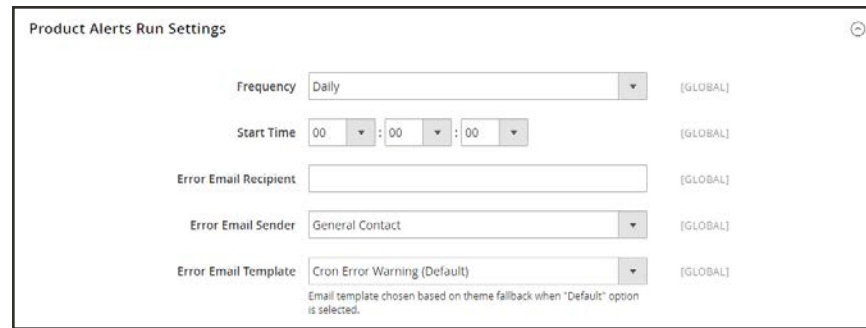
Setting	Value	View Link
Allow Alert When Product Price Changes	No	[STORE VIEW]
Price Alert Email Template	Price Alert (Default)	[STORE VIEW]
<small>Email template chosen based on theme fallback when "Default" option is selected.</small>		
Allow Alert When Product Comes Back in Stock	No	[WEBSITE]
Stock Alert Email Template	Stock Alert (Default)	[STORE VIEW]
<small>Email template chosen based on theme fallback when "Default" option is selected.</small>		
Alert Email Sender	General Contact	[STORE VIEW]

### Product Alerts

4. When complete, tap **Save Config**.

## Product Alert Run Settings

These settings enable you to select how often Magento checks for changes that require alerts to be sent. Additionally, you can select the recipient, sender, and template for emails that are sent if the sending of alerts fails.



*Product Alert Run Settings*

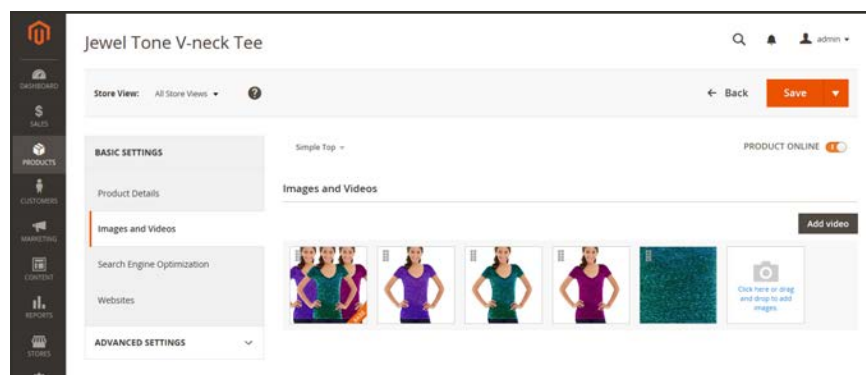
### To set up product alerts:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Catalog**.
3. Expand ☑ the **Product Alerts Run Settings** section, and do the following:
  - a. To determine how often product alerts are sent, set **Frequency** to one of the following:
    - Daily
    - Weekly
    - Monthly
  - b. To determine the time of day product alerts are sent, set **Start Time** to the hour, minute, and second.
  - c. In the **Error Email Recipient** field, enter the email of the person to be contacted if an error occurs.
  - d. In the **Error Email Sender** field, select the store identity that appears as the sender of the error notification.
  - e. Set **Error Email Template** to the transactional email template to be used for the error notification.
4. When complete, tap **Save Config**.

## CHAPTER 16:

# Images and Videos

Using high-quality images of consistent proportion gives your catalog a professional look with commercial appeal. If you have a large catalog with several images per product, you can easily have hundreds, if not thousands of product images to manage. Before you get started, establish a naming convention for your image files, and organize them so you can find the originals if you ever need them.



*Product Images*

A single product image is rendered in different sizes throughout the catalog. The size of the image container on the page is defined in the style sheet, but how the image is used is determined by the role that is assigned to the image. The main product image, or “base” image, must be large enough to produce the magnification that is needed for zoom. In addition to the main image, a smaller version of the same image might appear in product listings, or as a thumbnail in the shopping cart. You can upload an image in the largest size that is needed, and let Magento render the sizes needed for each use. The same image can be used for all roles, or a different image can be assigned to each role. By default, the first image that is uploaded is assigned to all three roles.

## Uploading Product Images

For each product, you can upload multiple images, rearrange their order, and control how each image is used. If you have a large quantity of images to manage, you might prefer to import them as a batch, rather than upload each one individually. To learn more, see:

[Importing Product Images](#).

### To manage images:

1. Open the product in edit mode. Scroll down and expand the **Images and Videos** section. Then, do any of the following:

#### Upload an Image

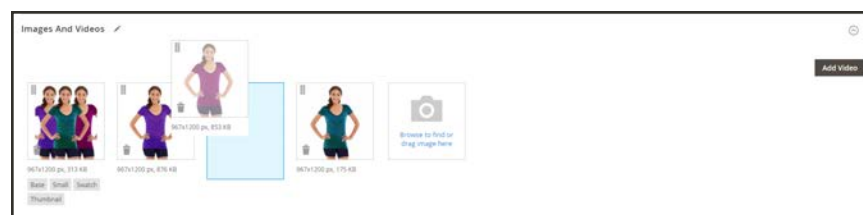
- Drag an image from your desktop, and drop it on the **camera** (📷) tile in the Images box.
- In the Images box, tap the **camera** (📷) tile, and navigate to the image file on your computer. Then, select the image, and tap **Open**.



*Upload or Drag and Drop*

#### Rearrange Images

To change the order of images in the gallery, tap the **Sort** (☰) icon at the bottom of the image tile. Then, drag the image to a different position in the Images box.

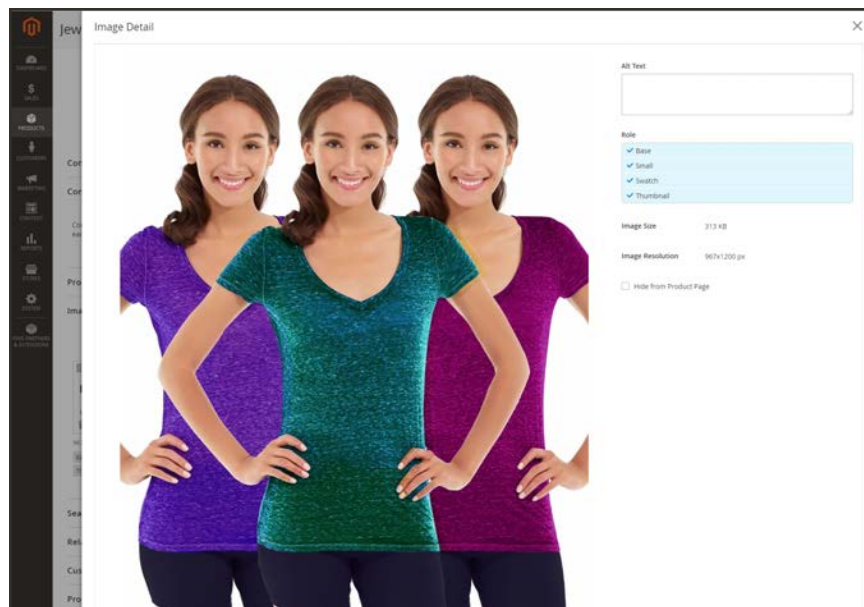


*Change Order*

#### Delete an Image

To remove an image from the gallery, tap the **Delete** (🗑️) icon in the upper-right corner of the image tile. Then, tap **Save**.

2. Tap the image that you want to open in detail view: Then, do any of the following:



*Image Detail View*

## Enter Alt Text

Image Alt text is referenced by screen readers to improve web accessibility, and by search engines when indexing the site. Some browsers display the Alt text on mouseover. Alt text can be several words long, and include carefully selected key words.

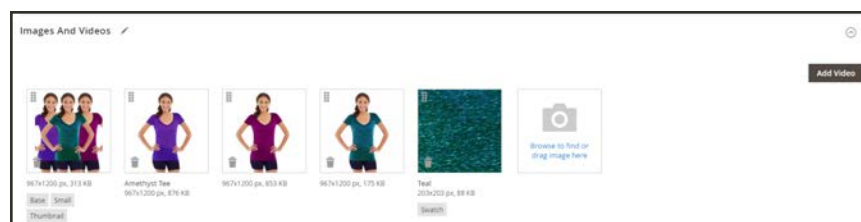
In the **Alt Text** box, enter a brief description of the image.

## Assign Roles

By default, all roles are assigned to the first image that is uploaded to the product. To reassign a role to another image, do the following:

1. Tap an image tile to open the image in detail view.
2. In the **Role** box, choose the role that you want to assign to the image.

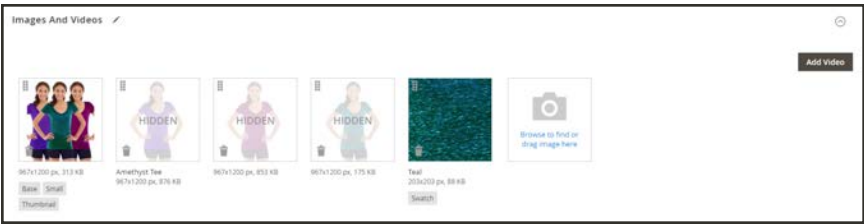
When you return to the Images and Videos section, the currently assigned roles appear below each image.



*Assigned Roles*

Hide Image

To exclude an image from the thumbnail gallery, mark the **Hidden** checkbox. Then, tap **Save**.



Hidden Images

- 3. To close detail view, click the **Close** ( ✕ ) box in the upper-right corner.
- 4. When complete, tap **Save**

Image Roles

IMAGE ROLE	DESCRIPTION
Thumbnail	Thumbnail images appear in the thumbnail gallery, shopping cart, and in some blocks such as Related Items. Example size: 50 x 50 pixels
Small Image	The small image is used for the product images in listings on category and search results pages, and to display the product images needed for sections such as for Up-sells, Cross-sells, and the New Products List. Example size: 470 x 470 pixels
Base Image	The base image is the main image on the product detail page. Image zoom is activated if you upload an image that is larger image than the image container. Example sizes: 470 x 470 pixels (without Zoom) 1100 x 1100 pixels (with Zoom)
Swatch	A swatch can be used to illustrate the color, pattern, or texture. Example size: 50 x 50 pixels



## Adding Product Video

To add product video, you must first obtain an API Key from your Google account, and enter it in the configuration of your store. Then, you can link to the video from the product.

### Step 1: Get Your YouTube API Key

1. Log in to your Google account, and visit the [Google Developers Console](#). Then, do the following:
  - a. Under Use Google APIs, click **Enable and manage APIs**.
  - b. In the panel on the left choose **Credentials**. Expand the Add Credentials menu, and choose **API key**.
  - c. When prompted to create a new key, choose **Server key**. Enter a name for the key, and tap **Create**.
2. Wait a few moments while the key is generated. Then, copy the key to the clipboard.  
In the next step, you will paste the key into your store's configuration.

### Step 2: Configure Magento

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Catalog**.
3. Expand ☑ the **Product Video** section. Then, paste your **YouTube API key**.

The screenshot shows a configuration box titled "Product Video" with a close icon in the top right corner. Inside the box, there is a label "YouTube API key" followed by a text input field. To the right of the input field is a button labeled "[STORE VIEW]".

*Product Video*

4. When complete, click **Save Config**.
5. When prompted, refresh the cache.

### Step 3: Link to the Video

1. Open a product in edit mode. Then in the Images and Video section, tap **Add Video**.

If you haven't yet entered your YouTube API key, tap **OK** to continue. You won't be able to link to a YouTube video, but you can go through the process.



#### Add Video

2. Enter the **URL** of the YouTube or Vimeo video.
3. Enter the **Title** and **Description** of the video.
4. To upload a **Preview Image**, browse to the image and select the file.
5. If you prefer to use the video meta data, tap **Get Video Information**.
6. To determine how the video is used in the store, mark the checkbox of each **Role** that applies:
  - Base Image
  - Small Image
  - Swatch Image
  - Thumbnail
  - Hide from Product Page
7. When complete, tap **Save**.

New Video

Cancel

Save

Url

atch?v=iZBbQHnk54k&feature=youtu.be

Youtube or Vimeo supported

Title


New Luma Yoga Collection

Description

Get fit and look fab in new seasonal styles.

Preview Image

C:\Users\condra\Docum Browse...



Get Video Information

Role


☒ Base Image

☐ Small Image

☐ Thumbnail

☐ Hide from Product Page

New Luma Yoga Collection



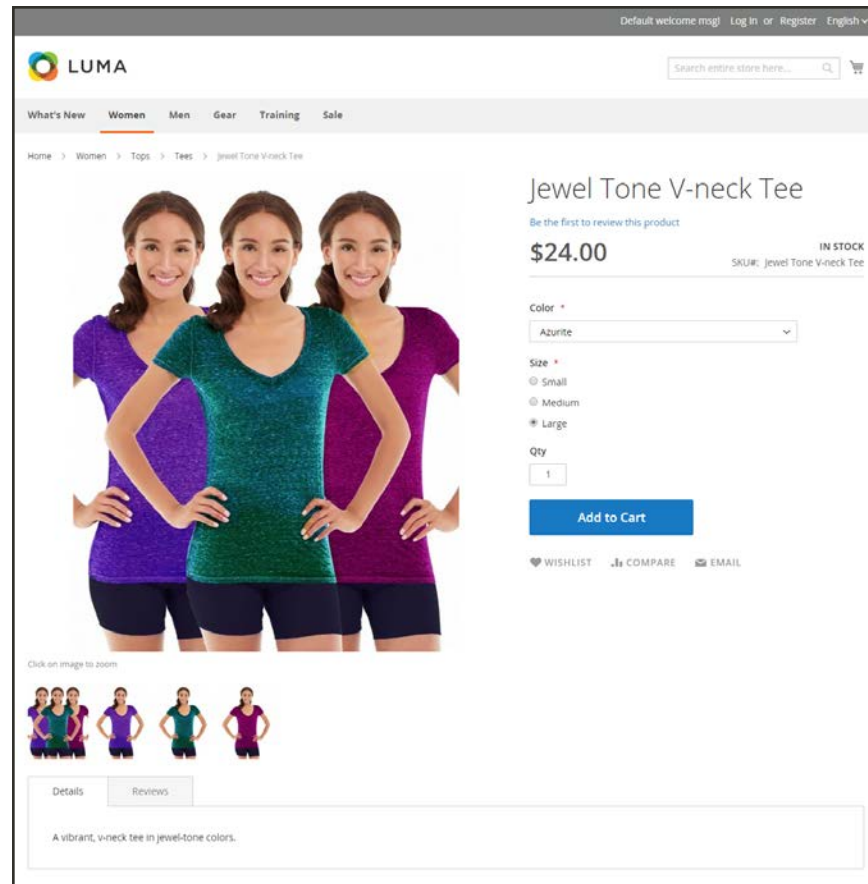
New Video

Field Descriptions

FIELD	DESCRIPTION
URL	The URL of the associated video.
Title	The video title.
Description	The video description.
Preview Image	An uploaded image that is used as a preview of the video in your store.
<div>Get Video Information</div>	Retrieves the video meta data that is stored on the host server. You can use the original data, or update it as needed.
Role	Determines how the preview image is used in your store. Options: Base Image Small Image Thumbnail Swatch Image Hide from Product Page

## Media Gallery

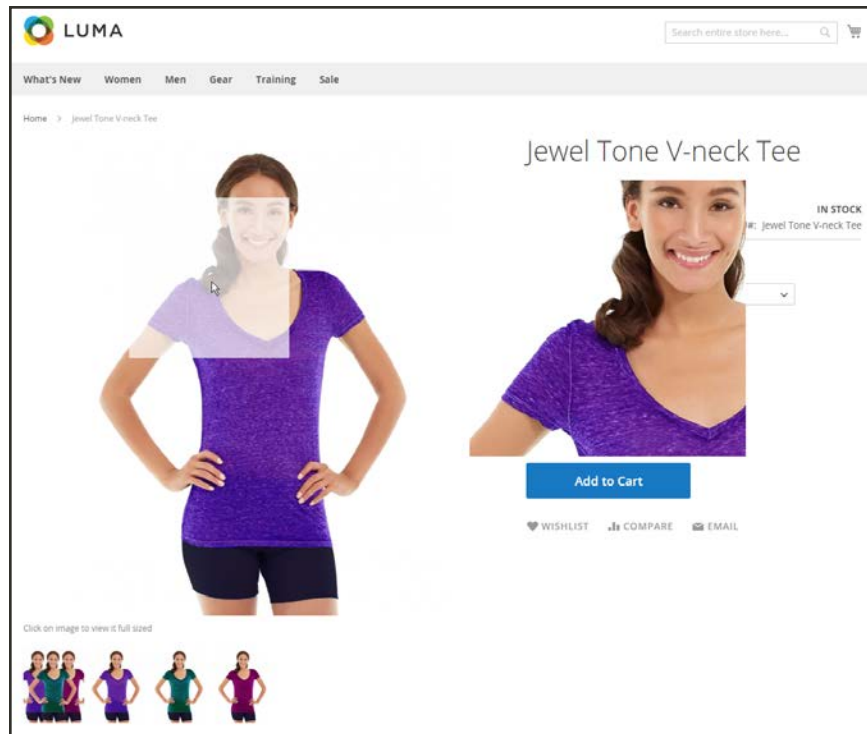
The media gallery on the product page displays multiple images, video, or swatches related to the product. Each thumbnail can show a different view or variation of the product. Click a thumbnail to browse through the gallery, Although the position of the gallery varies by theme, the default position is just below the main image on the product page.



*Media Gallery*

## Image Zoom

Customers can view a magnified portion of the image on mouseover, if the image is large enough to create the zoom effect. When zoom is activated, you can click the main image and move the cursor around to magnify different parts of the image. The magnified selection appears to the right of the image.



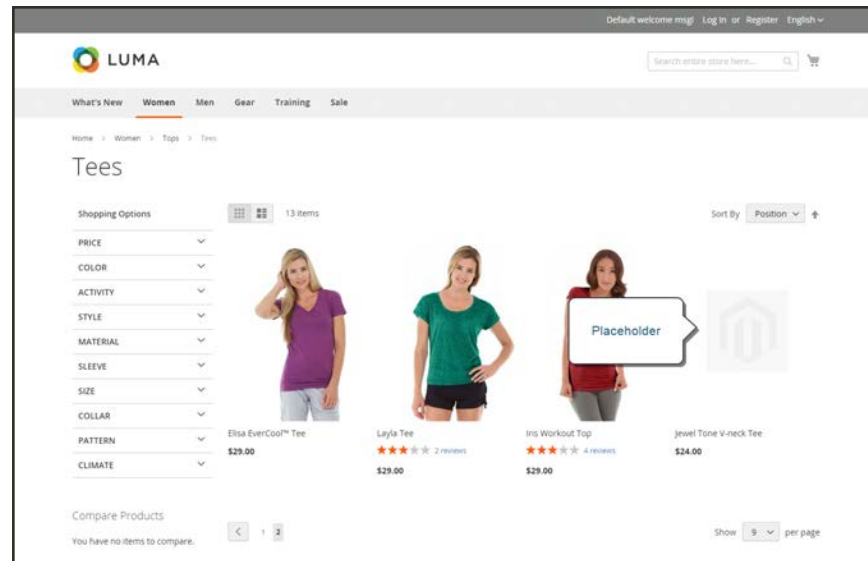
*Image Zoom*

## Light Boxes and Sliders

There are many third-party light boxes and sliders that you can use to enhance the presentation of your product images. Look for extensions in [Magento Marketplace](#).


## Placeholders

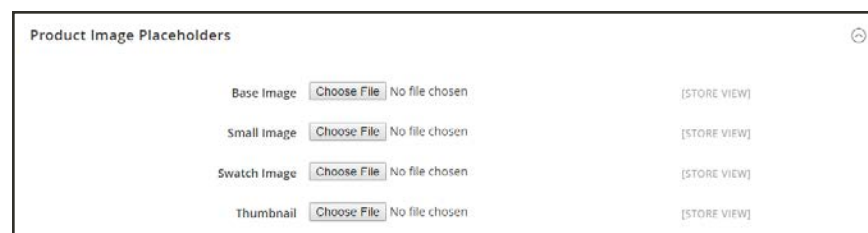
Magento uses temporary images as placeholders until the permanent product images become available. A different placeholder can be uploaded for each role. The initial placeholder image is the Magento logo, which you can replace with an image of your choice.



*Image Placeholder*

### To upload placeholder images:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, and choose **Catalog**.
3. Expand  the **Product Image Placeholders** section.
4. For each image role, tap **Choose File**. Find the image on your computer and upload the file. You can use the same image for all three roles, or upload a different placeholder image for each role.



*Product Image Placeholders*

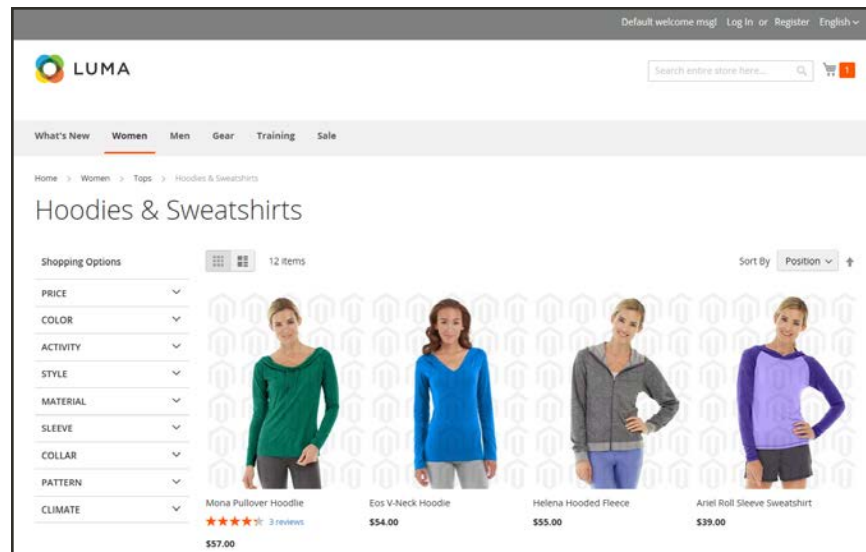
5. When complete, tap **Save**.

## Watermarks

If you go to the expense of creating your own original product images, there is not much you can do to prevent unscrupulous competitors from stealing them with the click of a mouse. However, you can make them a less attractive target by placing a watermark on each image to identify them as your property. A watermark file can be either a .jpg (jpeg), .gif, or .png image. Both .gif and .png formats support transparent layers, which can be used to give the watermark a transparent background.


The watermark used for the “small” image in the following example is a black logo with a transparent background, and saved as a .png file with the following settings:

Size: 50x50  
Opacity: 5  
Position: Tile



*Tiled Watermark*

### To add watermarks to product images:

1. On the Admin sidebar, tap **Content**. Then under **Design**, choose **Configuration**.
2. Find the store view that you want to configure. Then in the **Action** column, click **Edit**.
3. Under **Other Settings**, expand  the **Product Image Watermarks** section.
4. Complete the **Base**, **Thumbnail**, **Small**, and **Swatch Image** image settings as follows. The fields in each section are the same.
  - a. Enter the **Image Opacity** as a percentage. For example: 40
  - b. Enter the **Image Size**, in pixels. For example: 200 x 200
  - c. Tap **Upload**, and choose the image file that you want to use.
  - d. Set **Image Position** to determine where the watermark appears.



The screenshot shows the 'Product Image Watermarks' configuration window with the 'Base' tab selected. It contains the following fields and controls:

- Image:** A button labeled 'Upload' with the text 'Allowed file types: jpeg, gif, png.' below it.
- Image Opacity:** A text input field with a '%' symbol on the right.
- Image Size:** A text input field with the text 'Example format: 200x300.' below it.
- Image Position:** A dropdown menu currently showing 'Stretch'.

*Product Image Watermarks - Base*

5. When complete, tap **Save Config**.
6. When prompted to refresh the cache, tap the **Cache Management** link in the system message. Then, refresh the invalid cache.



*Refresh Cache*

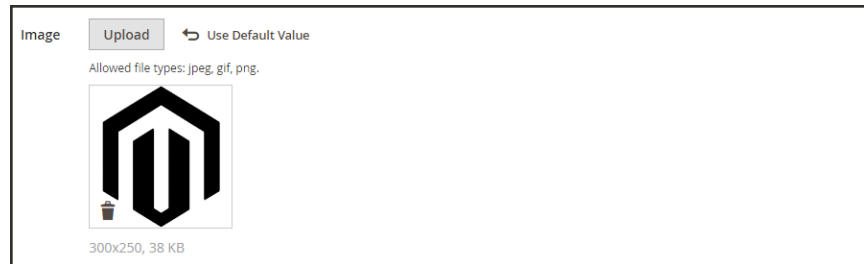
### To restore the default value:

Tap **Use Default Value** (.



**To delete a watermark:**

1. In the lower-left corner of the image, tap **Delete** (🗑️).

*Delete Watermark*

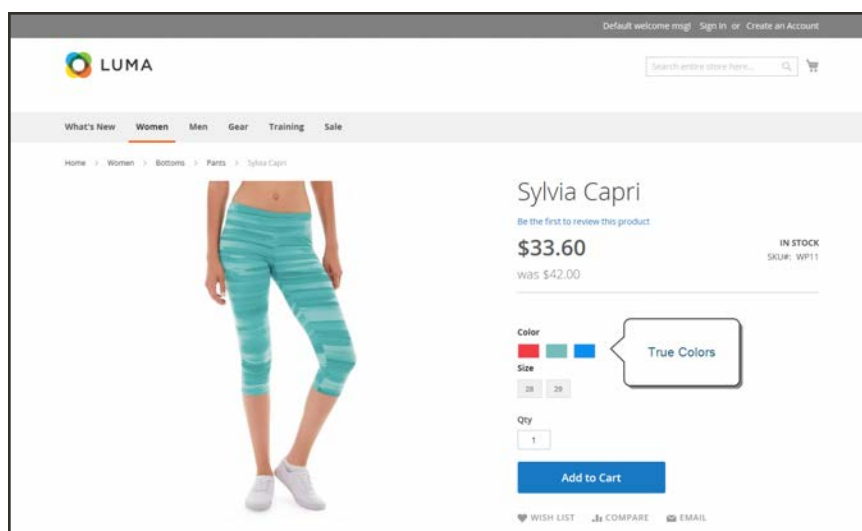
2. Tap **Save Config**.
3. When prompted to refresh the cache, tap the **Cache Management** link in the system message. Then, refresh the invalid cache.

If the watermark image persists in the storefront, return to Cache Management and tap **Flush Magento Cache**.

## Swatches

Customers have high expectations when it comes to color, and it is crucial that product descriptions accurately represent each available color, pattern, or texture. For example, the capris in the illustration below are not simply available in red, green, and blue. Rather, they are available only in very specific shades of red, green, and blue, which are probably unique to this product.

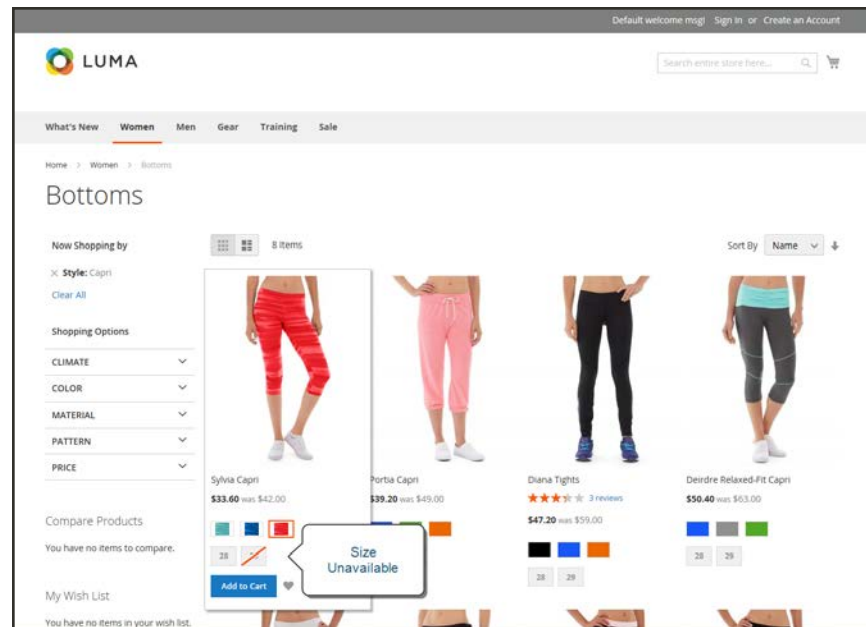
For **configurable products**, color can be indicated by a visual swatch, text swatch, or a drop-down input control. Swatches can be used on the product page, in product listings, and in **layered navigation**. On the product page, swatches are synchronized to display the corresponding product image when the swatch is chosen. When chosen, the corresponding value appears in the input field, and the swatch is outlined as the current selection.



*Swatches on Product Page*

### Text-Based Swatches

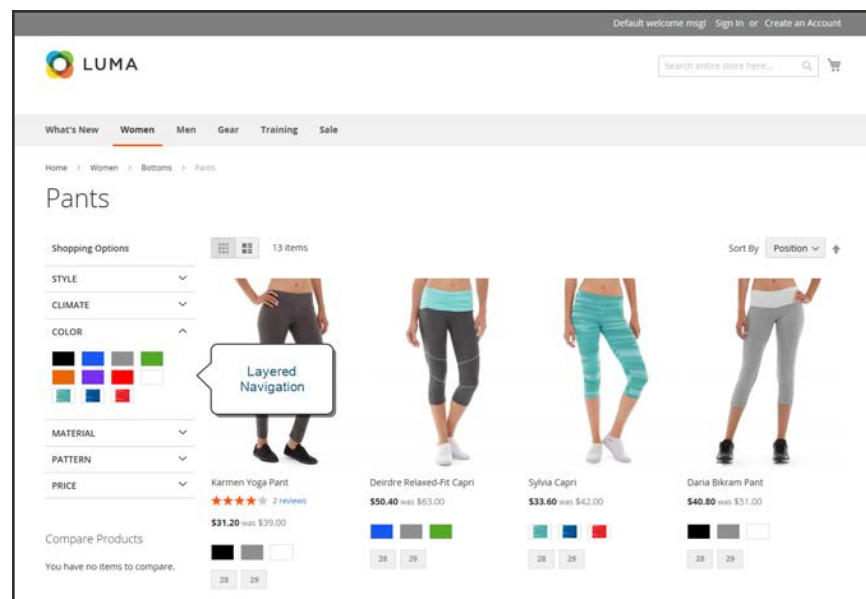
If an image isn't available for a swatch, the attribute value appears as text. A text-based swatch is like a button with a text label, and behaves in the same way as a swatch with an image. When text-based swatches are used to show the available sizes, any size that is not available is crossed out.



*Text-Based Swatches for Size*

## Swatches in Layered Navigation

Swatches can also be used in layered navigation, provided that the Use in Layered Navigation property of the color attribute is set to “Yes.” The following example shows both text-based and color image swatches in layered navigation.



*Swatches in Layered Navigation*

## Creating Swatches

Swatches can be defined as a component of the color attribute, or set up locally for a specific product as uploaded **product images**.

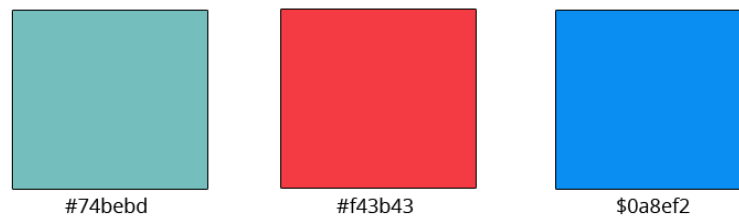
In the following examples, the Sylvia Capris are available in specific values of red, green, and blue. Because the swatches were taken from the product image, each is a true representation of the color. The color attribute is used to manage the information for all product colors and swatches.

### Step 1: Create the Swatches

Use either of the following methods to create swatches for your products:

#### Method 1: Add a Color Swatch













1. To capture the true color of a product, open the image in a photo editor and use the eye dropper tool to identify the exact color. Then, take note of the equivalent hexadecimal value.



*Hexadecimal Color Values*

2. On the Admin sidebar, tap **Stores**. Then under **Attributes**, choose **Product**.
3. In the grid, open the **color** attribute in edit mode.
4. Verify that **Catalog Input Type for Store Owner** is set to “Visual Swatch.”
5. Under **Manage Swatch** (values of your attribute), tap **Add Swatch**. Then, do the following:

Manage Swatch (values of your attribute)

	Is Default	Swatch	Admin	Default Store View
	<input checked="" type="radio"/>		Black	
	<input type="radio"/>		Blue	
	<input type="radio"/>		Brown	
	<input type="radio"/>		Gray	
	<input type="radio"/>		Green	
	<input type="radio"/>		Lavender	
	<input type="radio"/>		Multi	
	<input type="radio"/>		Orange	
	<input type="radio"/>		Purple	
	<input type="radio"/>		Red	
	<input type="radio"/>		White	
	<input type="radio"/>		Yellow	

Add Swatch

*Manage Swatch Values*


- a. In the Swatch column, tap the new swatch to display the menu. Then, select **Choose a color**.



The screenshot shows the 'Add Swatch' button and a dropdown menu with options: 'Choose a color', 'Upload a file', and 'Clear'. A callout bubble points to the 'Choose a color' option.

*Choose a Color*







- b. In the color picker, place your cursor in the # field, and press the **Backspace** key to delete the current value. Then, enter the six-character hexadecimal value of the new color..



The screenshot shows the color picker interface with a color wheel and a 'Hexadecimal Color' input field. The input field contains the text '#ffffff'.

- c. To save the swatch, tap the Color Wheel (🎨) in the lower-right corner of the color picker.
- d. In the Admin column, enter a label to describe the color to the store administrator. Then if applicable, enter the translation of the color for each each language supported. In the following example, we include the SKU for reference in the Admin label because the colors are used only for a specific product. You can include a space or underscore in the label, but not a hyphen.

- e. In the **Is Default** column, select the swatch that is to be the default option.
- f. To change the order of the swatches, simply drag each swatch into position.

	<input type="radio"/>		<input type="text" value="Red SW11"/>	<input type="text" value="Red"/>
	<input type="radio"/>		<input type="text" value="Green SW11"/>	<input type="text" value="Green"/>
	<input type="radio"/>		<input type="text" value="Blue SW11"/>	<input type="text" value="Blue"/>

*Swatch Labels*

6. When complete, tap **Save Attribute**. Then when prompted, refresh the cache.
7. The last step is to open each product in **Edit** mode, and update the **Color** attribute with the correct swatch. To update multiple products at the same time, follow the steps below.

### Method 2: Upload a Swatch Image

1. To capture an image for a swatch, open the product image in a photo editor, and save a square area of the image that depicts the color, pattern, or texture. Then repeat for each variation of the product. The size and dimensions of the swatch is determined by the theme. As a general rule, saving an image as a square helps to preserve the aspect ratio of a pattern.

*Swatch Images*

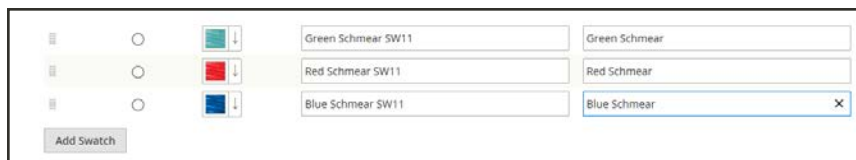
2. On the Admin sidebar, tap **Stores**. Then under **Attributes**, choose **Product**.
3. In the grid, open the **color** attribute in edit mode.
4. Verify that **Catalog Input Type for Store Owner** is set to “Visual Swatch.”
5. Under **Manage Swatch** (values of your attribute), tap **Add Swatch**. Then, do the following:

- a. In the Swatch column, tap the new swatch to display the menu. Then, choose **Upload a file**.



*Upload a File*

- b. Navigate to the swatch file that you prepared, and choose the file to upload.
- c. Repeat these steps for each swatch image.
- d. Enter the labels for the Admin and Storefront. In this example, we include the SKU in the admin label for reference because these colors are used only for a specific product. You can include a space or underscore in the label, but not a hyphen.

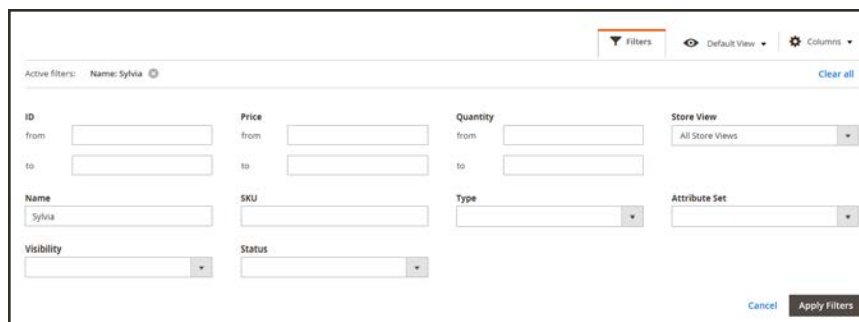


*Enter Labels*

6. When complete, tap **Save Attribute**. Then when prompted, refresh the cache.
7. The last step is to open each product in Edit mode, and update the Color attribute with the correct swatch. To update multiple products at the same time, follow the steps below.

## Step 2: Update Your Products

1. On the Admin sidebar, tap **Products**. Then under **Inventory**, choose **Catalog**.
2. **Filter** the list by Name or SKU to include only the applicable products. The following example filters the list on a partial product name.



*Filters*

- 3. In the grid, mark the checkbox of each product to which the swatch applies. In this example, all blue capris are selected. Then, set the **Actions** control to “Update Attributes.”

Actions

7 records found (2 selected)

20 per page

< 1 of 1 >

	Name	Type	Attribute Set	SKU	Price	Quantity	Visibility	Status	Websites	Action
<input type="checkbox"/>	Sylvia Capri-29-Red	Simple Product	Bottom	WP11-29-Red	\$42.00	100.0000	Not Visible Individually	Enabled	Main Website	<a href="#">Edit</a>
<input type="checkbox"/>	Sylvia Capri-29-Green	Simple Product	Bottom	WP11-29-Green	\$42.00	100.0000	Not Visible Individually	Enabled	Main Website	<a href="#">Edit</a>
<input checked="" type="checkbox"/>	Sylvia Capri-29-Blue	Simple Product	Bottom	WP11-29-Blue	\$42.00	100.0000	Not Visible Individually	Enabled	Main Website	<a href="#">Edit</a>
<input type="checkbox"/>	Sylvia Capri-28-Red	Simple Product	Bottom	WP11-28-Red	\$42.00	100.0000	Not Visible Individually	Enabled	Main Website	<a href="#">Edit</a>
<input type="checkbox"/>	Sylvia Capri-28-Green	Simple Product	Bottom	WP11-28-Green	\$42.00	100.0000	Not Visible Individually	Enabled	Main Website	<a href="#">Edit</a>
<input checked="" type="checkbox"/>	Sylvia Capri-28-Blue	Simple Product	Bottom	WP11-28-Blue	\$42.00	100.0000	Not Visible Individually	Enabled	Main Website	<a href="#">Edit</a>
<input type="checkbox"/>	Sylvia Capri	Configurable Product	Bottom	WP11	\$42.00	0.0000	Catalog Search	Enabled	Main Website	<a href="#">Edit</a>

Update Attributes

- 4. Scroll down to the **Color** attribute, and mark the **Change** checkbox.

Color

Blue SW11

[GLOBAL]

☒ Change

Change

- 5. Choose the swatch that applies to the selected products, and tap **Save**. Then when prompted, refresh the cache.



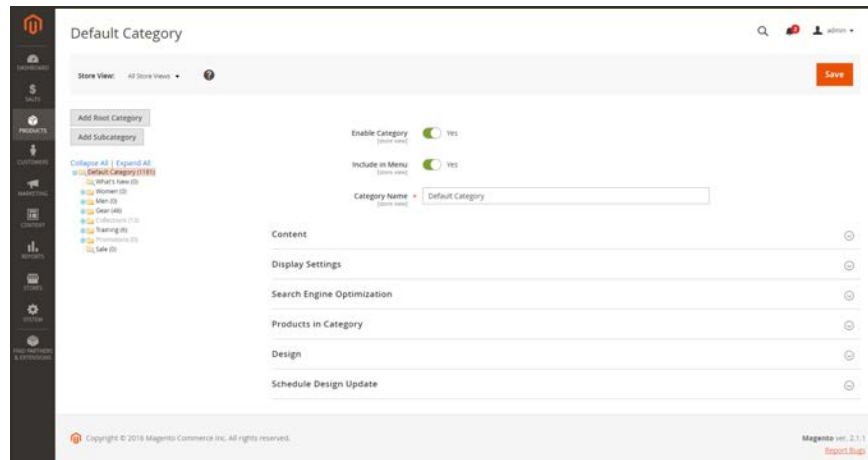
Swatch in Storefront



## CHAPTER 17:

# Categories

Before you add products to your catalog, you need to establish the basic category structure of your catalog. Every product must be assigned to at least one category. Categories are usually created in advance, before products are added to the catalog. However, you can also add categories “on the fly” while creating a product.



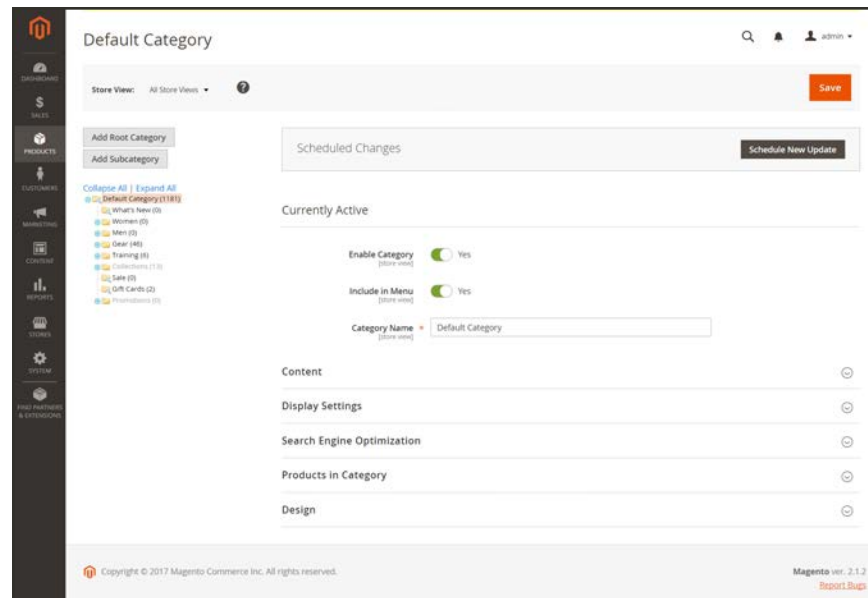
*Category Tree*

## Controls

FIELD	DESCRIPTION
Add Root Category	Creates a new root category.
Add Subcategory	Adds a subcategory below the current category or subcategory.
Collapse All / Expand All	Either collapses or expands the category tree.
Delete	Removes the current category or subcategory from the tree.
Save	Saves any changes made to the category.

## Creating Categories

The category structure of your catalog is like an upside-down tree, with the root at the top. Each section of the tree can be expanded and collapsed. Any disabled or hidden categories are grayed out. The first level of categories below the root typically appear as options in the main menu. You can have as many additional subcategories as you need. Categories can be dragged and dropped to other locations in the tree. The category ID number appears in parentheses after the category name at the top of the page.



*Category Tree*

### Process Overview:

Step 1: **Create a Category**

Step 2: **Complete the Basic Information**

Step 3: **Complete the Category Content**

Step 4: **Complete the Display Settings**

Step 5: **Complete the Search Engine Optimization Settings**

Step 6: **Choose the Products in Category**

Step 7: **Complete the Design Settings**

## Step 1: Create a Category

1. On the Admin sidebar, tap **Products**. Then under Inventory, choose **Categories**.
2. Set **Store View** to determine where the new category is to be available.
3. In the category tree, tap the parent category of the new category. The parent is one level above the new category.

If you're starting from the beginning without any data, there might be only two categories in the list: "Default Category," which is the root, and an "Example Category."

4. Tap **Add Subcategory**.

## Step 2: Complete the Basic Information

1. If you want the category to be immediately available in the store, set **Enable Category** to the "Yes" position.
2. To include the category in the **top navigation**, set **Include in Menu** to the "Yes" position.
3. Enter the **Category Name**.



*Basic Information*


4. Tap **Save** and continue.

## Step 3: Complete the Category Content

1. Expand ☑ the **Content** section.
2. To display a **Category Image** at the top of the page, tap **Upload**. Then, choose the image that you want to represent the category.
3. In the **Description** box, enter the text that you want to appear on the category landing page. Then, format the text as needed. To learn more, see: [Using the Editor](#).
4. To include a content block on the category landing page, choose the **CMS Block** that you want to appear.
5. Tap **Save** and continue.

*Content*

### Step 4: Complete the Display Settings

1. Expand  the **Display Settings** section.
2. Set **Display Mode** to one of the following:
  - Products Only
  - Static Block Only
  - Static Block and Products
3. If you want the category page to include the “Filter by Attribute” section of layered navigation, set **Anchor** to the “Yes” position.
4. To change the **Available Product Listing Sort By** options, do the following:
  - a. Clear the **Use All** checkbox.
  - b. Select one or more of the available values to be available for customers to sort the list. By default, all available values are included. For example, the values might include:
    - Position
    - Product Name
    - Price
5. To set the default sort order for the category, choose the **Default Product Listing Sort By** value.
6. To change the default layered navigation **price step** setting, do the following:
  - a. Clear the **Use Config Settings** checkbox.
  - b. Enter the value to be used as an incremental price step for layered navigation.
7. Tap **Save** and continue.

The screenshot shows the 'Display Settings' panel with the following options:

- Display Mode** (store view): A dropdown menu set to 'Products only'.
- Anchor** (global): A toggle switch set to 'Yes'.
- Available Product Listing Sort By** (store view): A list of options including 'Position', 'Product Name', and 'Price'. The 'Use All' checkbox is checked.
- Default Product Listing Sort By** (store view): A dropdown menu set to 'Position'. The 'Use Config Settings' checkbox is checked.
- Layered Navigation Price Step** (store view): A text input field containing a dollar sign '\$'. The 'Use Config Settings' checkbox is checked.

*Display Settings*

### Step 5: Complete the Search Engine Optimization Settings

1. Expand ☺ the **Search Engine Optimization Settings** section.
2. Enter a **URL Key** for the category, or let the system automatically create one that is based on the category name.
3. Complete the following **meta data** for the category:
  - Meta Title
  - Meta Keywords
  - Meta Description


The screenshot shows the 'Search Engine Optimization' panel with the following input fields:

- URL Key** (store view): A text input field.
- Meta Title** (store view): A text input field.
- Meta Keywords** (store view): A text input field.
- Meta Description** (store view): A text input field.

*Search Engine Optimization*

4. Tap **Save** and continue.

Step 6: Choose the Products in Category

- 1. Expand  the **Products in Category** section. Then, use one of the following methods to add products to the category.
- 2. Use the **filters** as needed to find the products.

To display all records that are not yet included in the category, set the record chooser in the first column to "No." Then, click **Search**.

- 3. In the first column, mark the checkbox of each product to include in the category.

Products in Category

SearchReset Filter2026 records found

20per page1 of 102

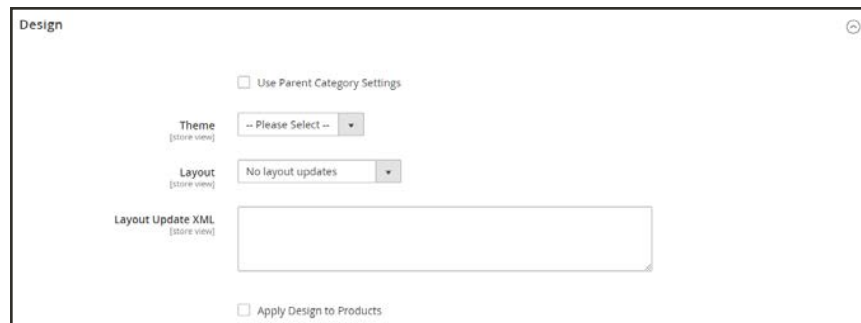
<input type="checkbox"/>	ID	Name	SKU	Price	Position
No				From	From
				To	To
<input checked="" type="checkbox"/>	195	Abominable Hoodie	MH09	\$69.00	
<input checked="" type="checkbox"/>	189	Abominable Hoodie-L-Blue	MH09-L-Blue	\$69.00	
<input checked="" type="checkbox"/>	190	Abominable Hoodie-L-Green	MH09-L-Green	\$69.00	

Selected Products

- 4. Tap **Save** and continue.

### Step 7: Complete the Design Settings

1. Expand ☑ the **Design** section.
2. To change the design of the category pages, choose the **Theme** that you want to apply.
3. To change the column layout of the category pages, choose the **Layout** that you want to apply.
4. To enter custom code, enter valid XML code in the **Layout Update XML** box.



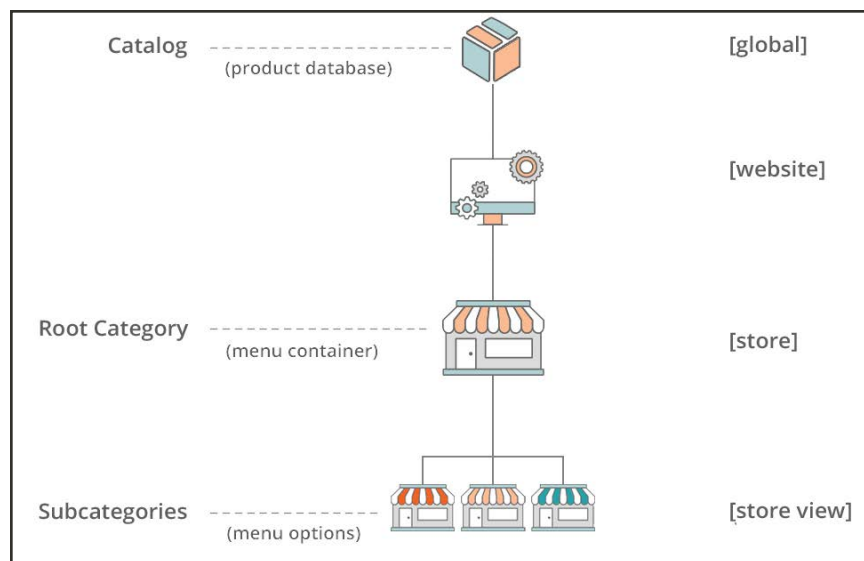
The screenshot shows the 'Design' settings panel. At the top, there is a checkbox labeled 'Use Parent Category Settings'. Below it, the 'Theme' section has a dropdown menu with '-- Please Select --' and a '(store view)' link. The 'Layout' section has a dropdown menu with 'No layout updates' and a '(store view)' link. The 'Layout Update XML' section has a large text area for entering XML code and a '(store view)' link. At the bottom, there is a checkbox labeled 'Apply Design to Products'.

*Design*

5. When complete, tap **Save**.

## Root Categories

The products in the main menu are determined by the **root category** that is assigned to the store. The root category is basically a container for the main menu. You can create a new catalog with an entirely new set of products, or copy products from an existing catalog. The catalog can be assigned to the current store, or to any other store in the same website.



### *Scope of Main Menu*

From the Admin, the category structure is like an upside-down tree, with the root on top. The root has a name, but no URL key, and does not appear in the **top navigation** of the store. All other categories in the menu are nested below the root. Because the root category is the highest level of the catalog, your store can have only one root category active at a time. You can, however, create additional root categories for alternate catalog structures, different stores, and views.

The following example shows how to create a new root category and assign it to a different store.

#### **Process Overview:**

Step 1: **Create a New Root Category**

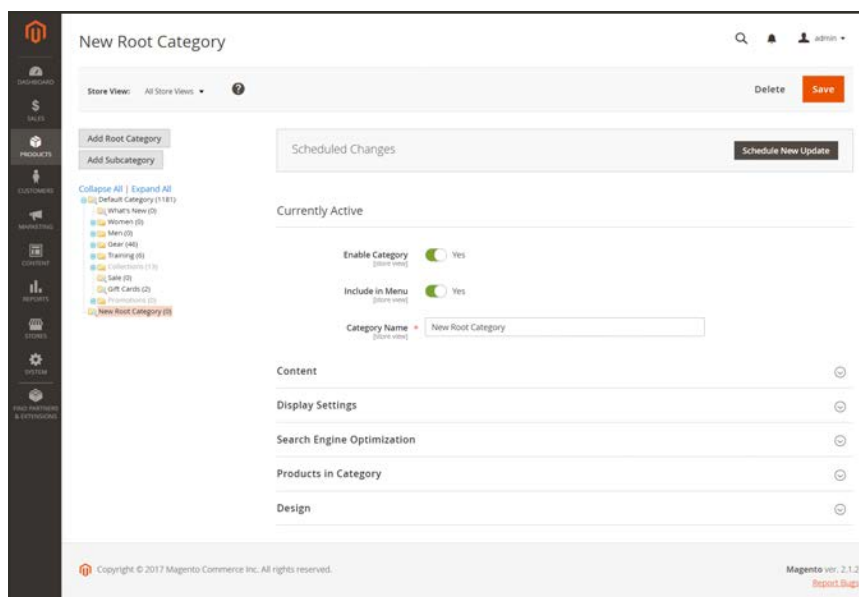
Step 2: **Build Out the Main Menu**

Step 3: **Assign the Root Category to the Store**



## Step 1: Create a New Root Category

1. On the Admin sidebar, tap **Products**. Then under **Inventory**, choose **Categories**.
2. In the panel on the left, tap **Add Root Category**.



*New Root Category*

3. Assign a **Category Name**.  
The name you choose will initially be assigned to all store views.
4. If you want to add products to the catalog from the current catalog, do the following:
  - a. Expand the **Products in Category** section.
  - b. Use the **search filters** to find the products you want. Then, mark the checkbox of each product that you want to copy into the new catalog.
5. When complete, tap **Save**.

## Step 2: Build Out the Main Menu

1. In the panel on the left, select the new root category that you created in the previous step.
2. Tap **Add Subcategory**. Then, follow the instructions to create the **category structure** for the main menu.

### Step 3: Assign the Root Category to the Store

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **All Stores**.
2. In the **Stores** column of the grid, click the store that you want to assign the new catalog.
3. Set **Root Category** to the new root category that you created.
4. Make sure that the store has a **Default Store View** assigned. The store must have at least one **store view**.
5. When complete, tap **Save Store**.
6. To verify that the store has a new catalog, do the following:
  - a. On the Admin sidebar, tap **Products**. Then, choose **Catalog**.

Any products that were copied to the new catalog appear in the grid.
  - b. Visit the storefront to verify that the new catalog and main menu are working correctly.

## Hidden Categories

There are many ways to use hidden categories. You might want to create additional category levels for your own internal purposes, but show only the higher-level categories to your customers. Or, you might want to link to a category that is not included in the navigation menu.

### To create hidden categories:

1. On the Admin sidebar, tap **Products**. Then under **Inventory**, choose **Categories**.
2. In the category tree, select the category you want to hide. Then, do the following:
  - a. Set **Is Active** to “Yes.”
  - b. Set **Include in Menu** to “No.”
3. In the **Display Settings** section, set **Anchor** to “No.”

The hidden category is active, but does not appear in the top menu, or in layered navigation.

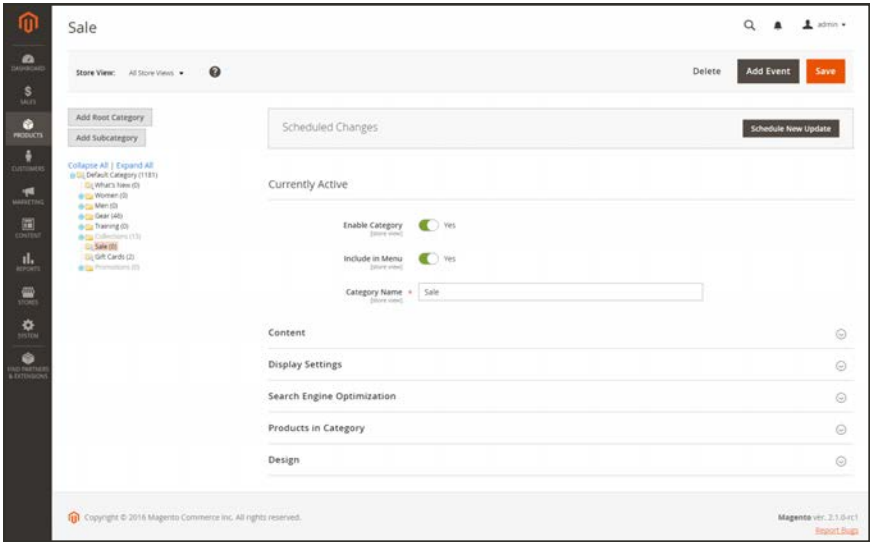
4. Although the category is hidden, you can still create subcategories beneath it, and make them active. Complete the following settings for each hidden subcategory:
  - a. Set **Enable Category** to “Yes.”
  - b. In the **Display Settings** section, set **Anchor** to “Yes.”

As active categories, you can now link to them from other places in your store, but they will not appear in the menu.

5. When complete, tap **Save**.

# Scheduled Changes

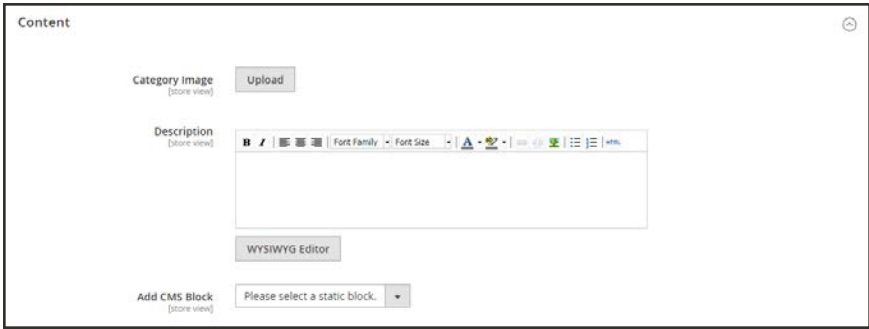
Category updates can be applied on schedule, and grouped with other content changes. You can create a new campaign based on scheduled changes to the category, or apply the changes to an existing campaign. To learn more, see: [Content Staging](#).



*Scheduled Changes*

## Content Settings

The Content settings determines any additional content that is to appear on the category page. In addition to the list of category products, the page can include an image, text description, and CMS block.



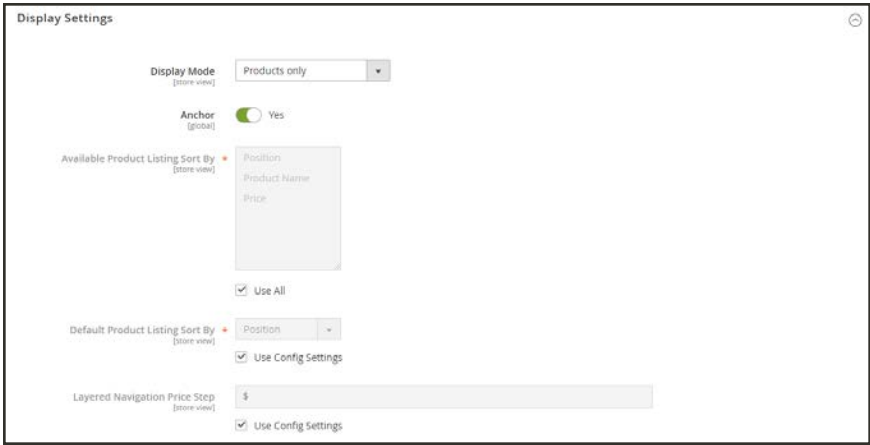
Category Content

### Field Descriptions

FIELD	SCOPE	DESCRIPTION
Category Image	Store View	Uploads an image that appears at the top of the category page.
		<div>Upload</div> Uploads an image for the category page.
Description	Store View	Enter a description of the category content.
		<div>WYSIWYG Editor</div> Toggles the editor between WYSIWYG and HTML modes.
Add CMS Block	Store View	Adds an existing CMS block to the category page.

# Display Settings

The Display Settings determine which content elements appear on a category page and the order in which products appear. You can enable CMS blocks, set the anchor status of the category, and manage sorting options from the Display Settings tab.



Display Settings

## Field Descriptions

FIELD	DESCRIPTION
Display Mode	Determines the content elements displayed on the category page. Options: Products Only Static Block Only Static Block and Products
Anchor	When set to “Yes,” includes the “filter by attribute” section in the layered navigation. Options: Yes / No
Available Product Listing Sort By	(Required) The default values are Position, Name, and Price. To customize the sorting option, clear the Use All Available Attributes checkbox and select the attributes you want to use. You can define and add attributes as needed.
Default Product Listing Sort By	(Required) To define the default “Sort By” option, clear the “Use Config Settings” checkbox and select an attribute.
Layered Navigation Price Step	By default, Magento displays the price range in increments of 10, 100, and 1000, depending on the products in the list. To change the Price Step range, clear the “Use Config Settings” checkbox.

# Search Engine Optimization

The Search Engine Optimization section specifies the **URL Key** and **meta data** fields that are used by search engines to index the category. Although some search engines ignore meta keywords, others continue to use them. The current **SEO best practice** is to incorporate high-value keywords in both the meta title and meta description.

Search Engine Optimization

URL Key

bottoms-women

Create Permanent Redirect for old URL

Meta Title

Meta Keywords

Meta Description

Search Engine Optimization

## Field Descriptions

FIELD	SCOPE	DESCRIPTION
URL Key	Store View	<p>Determines the online address of the category page. The URL key is added to the base URL of the store, and appears in the address bar of a browser. In the configuration, you can either include or exclude the category URL key in the product URL.</p> <p>The URL Key should be all lowercase characters, with hyphens instead of spaces. Do not include a suffix such as .html, because it is managed in the configuration.</p>
Meta Title	Store View	<p>The title appears in the title bar and tab of your browser, and is also the title on a search engine results page (<b>SERP</b><sup>1</sup>). The meta title should be unique to the page, and less than 70 characters in length.</p>
Meta Keywords	Store View	<p>Relevant keywords for the category Consider using keywords that customers might use to find products in the category.</p>

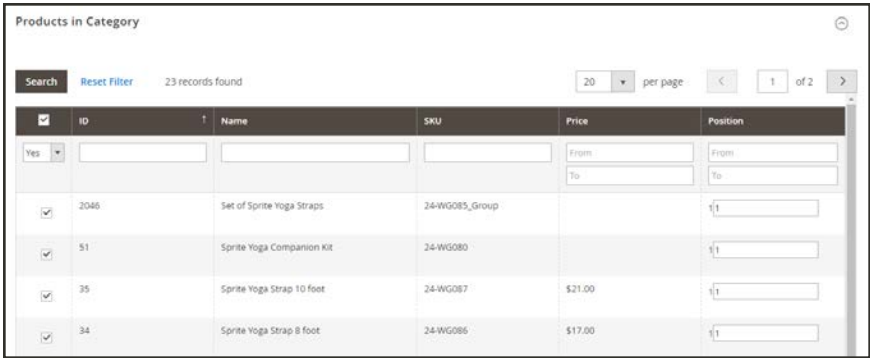
<sup>1</sup>Search Engine Results Page

Field Descriptions (cont.)

FIELD	SCOPE	DESCRIPTION
Meta Description	Store View	The meta description provides a brief overview of the page for search results listings. An ideal length is between 150-160 characters in length, with a maximum of 255 characters. Although not visible to the customer, some search engines include the meta description on the search results page.

Products in Category

The Products in Category section lists the products that are currently assigned to the category. The search filters at the top of each column are used to add and remove products from the category.



Category Products

Controls

FIELD	DESCRIPTION
Selection	<p>The checkbox in the header of the first column can be used to select or deselect all products.</p> <p>The control in the first row determines the type of search, and can be set to include any record, or only those that are either assigned or not assigned to the category. The checkbox in the first column of each row identifies products to be added to the category. Options: Yes / No / Any</p>
Search Filters	The <b>filter controls</b> at the top of each column can be used to enter specific values you want to either include or omit from the list, depending on the Select All setting.
Reset Filter	Clears all search filters.



**Controls (cont.)**

FIELD	DESCRIPTION
<input type="text" value="Search"/>	Searches the catalog based on the filter criteria, and displays the result.

## Sorting Category Products

The position of products in a category can be specified manually by dragging and dropping products into position, or by applying a predefined sort order. By default, products can be sorted by stock level, age, color, name, SKU, and price. Automatic sort overrides the current sort order, and resets any drag-and-drop positions that were set manually. The sort order of colors and the minimum stock level that can be required for products to be included in the list are set in the **Visual Merchandiser** configuration.

You can set up the category options separately for each store view to determine the selection of products, their relative position in the list, and the attributes that are available for category rules.

**Process Overview:**

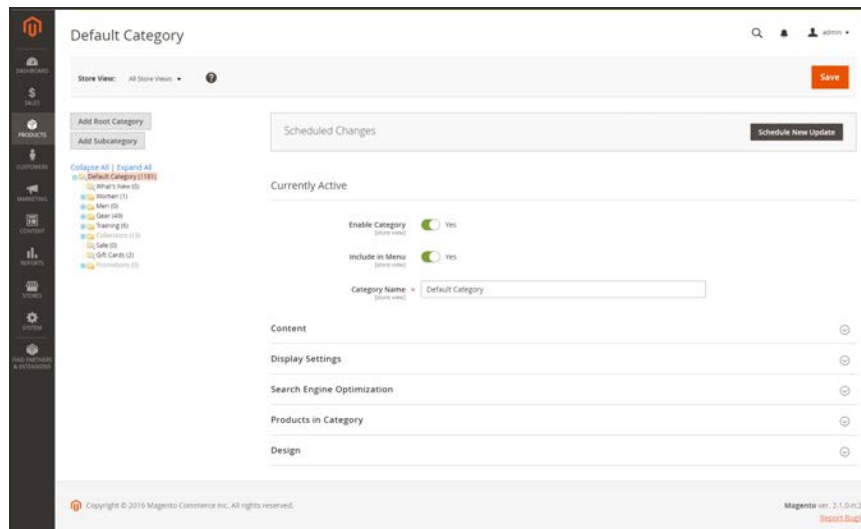
Step 1: **Set the Scope of the Configuration**

Step 2: **Sort the Products**

Step 3: **Save, Refresh, and Verify**


### Step 1: Set the Scope of the Configuration

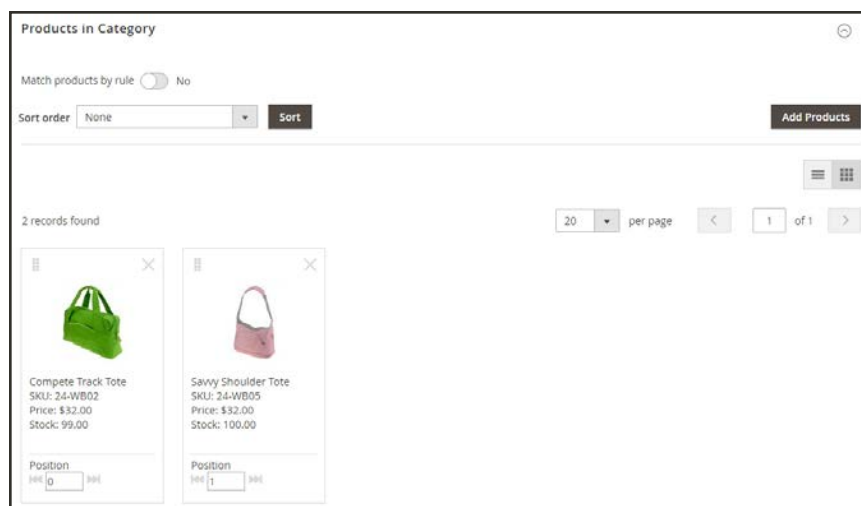
1. On Admin sidebar, choose **Products**. Then under **Inventory**, choose **Categories**.
2. If necessary, choose the **Store View** where the settings apply.
3. In the category tree on the left, choose the category that you want to edit.



Category Tree

## Step 2: Sort the Products

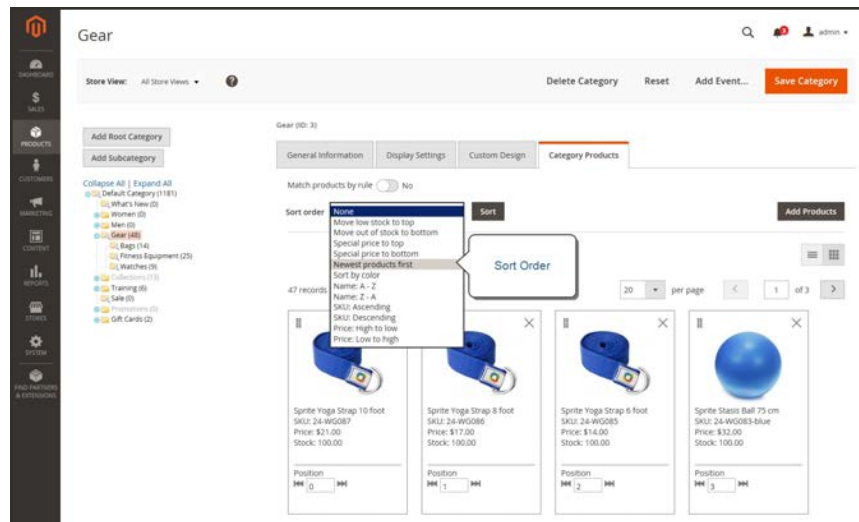
1. In the **Products in Category** section, tap the tiles (  ) button to show the product tiles in a grid. Then, use one of the following methods to sort the products:



Product Tiles

### Method 1: Manual Sort

1. Set **Sort Order** to your preference.
2. Tap **Sort** to apply the new sort order.

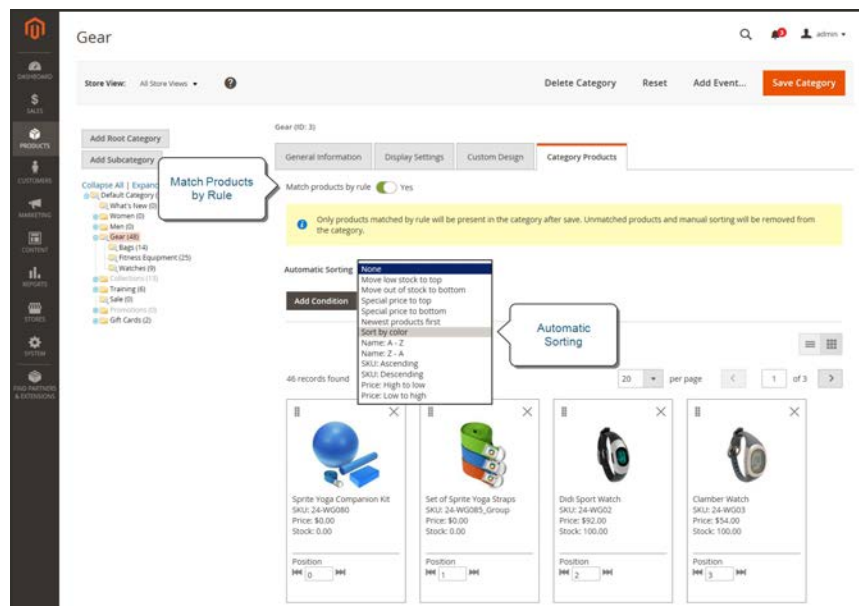


Sort Order

3. To save the sort order, tap **Save Category**.
4. When prompted, update any invalid indexes.

## Method 2: Automatic Sort

1. Set **Match products by rule** to “Yes.”




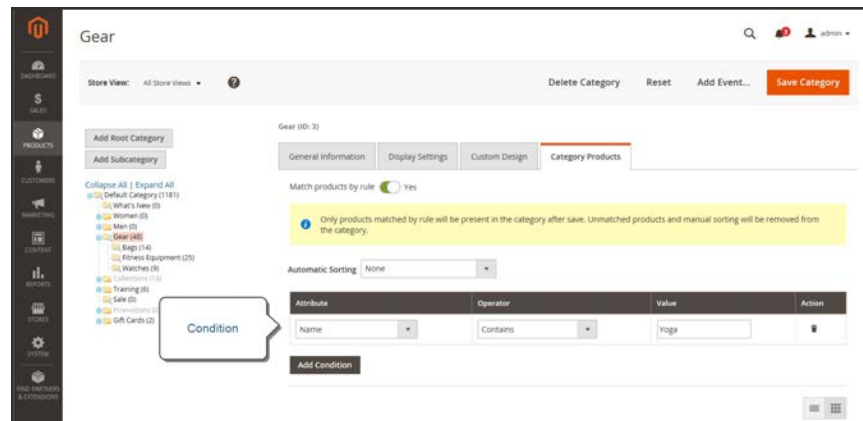
Match Products by Rule

2. Set **Automatic Sorting** to your preference.
3. Tap **Sort** to change the order of the list.
4. To save the sort order, tap **Save Category**.

2. When prompted, update any invalid indexers.

### Step 3: Create a Category Rule

1. Set **Match products by rule**  to “Yes.”
2. Tap **Add Condition**. Then, do the following:



*Category Condition*

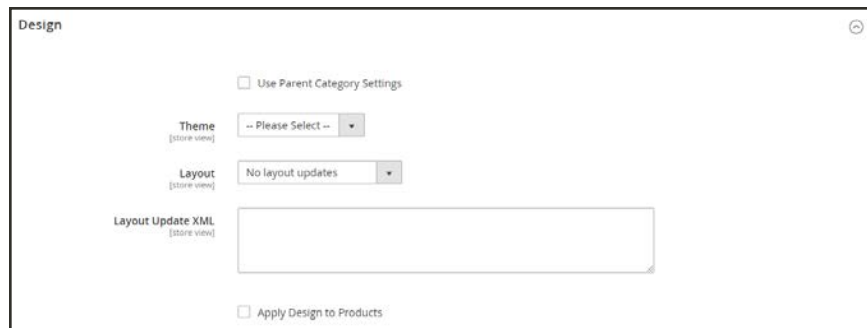
- a. Choose the **Attribute** that is the basis of the condition.
  - b. Set **Operator** to one of the following:
    - Equal / Not equal
    - Greater than / Greater than or equal to
    - Less than / Less than or equal to
    - Contains
  - c. Enter the appropriate **Value**.
3. To add another condition, tap **Add Condition** and repeat the process.

### Step 4: Save, Refresh, and Verify

1. When complete, tap **Save Category**.
2. When prompted to refresh the cache, click the **Cache Management** link and refresh each invalid cache.
3. In the storefront, verify that the product selection, sorting, and category rules work correctly. If you need to make adjustments, change the settings and try again.

## Design Settings

The Design section gives you control over the look and feel of a category and all assigned product pages, and page layout. You can customize a category page its assigned products for a promotion or to differentiate the category. For example, you might develop distinctive design for a brand or special line of products, or apply an update for a specific period of time.

The image shows a screenshot of the 'Design' settings form in a Magento application. The form is titled 'Design' in the top left corner. It contains several settings: a checkbox for 'Use Parent Category Settings' which is unchecked; a 'Theme' dropdown menu with the text '-- Please Select --' and a small 'store view' label below it; a 'Layout' dropdown menu with the text 'No layout updates' and a small 'store view' label below it; a 'Layout Update XML' text area with a small 'store view' label below it; and a checkbox for 'Apply Design to Products' which is unchecked. The form has a clean, minimalist design with a light gray background and a thin border.

*Design*

## Field Descriptions

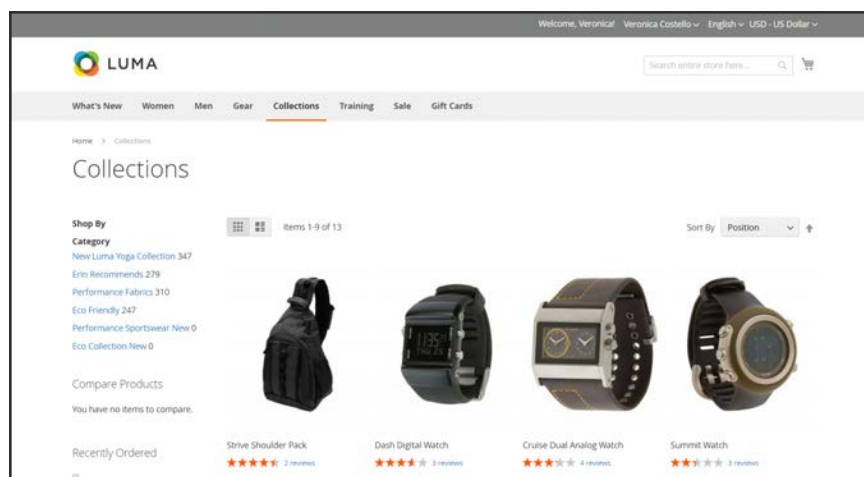
FIELD	DESCRIPTION
Use Parent Category Settings	Allows the current category to inherit the design settings from the parent category. Options: Yes / No
Theme	Applies a custom theme to the category.
Layout	Applies a different layout to the category page. Options: <div> <div>No layout updates</div> <div>Preselected by default, and does not apply layout changes to the category page.</div> </div> <div> <div>Empty</div> <div>Use to define your own page layout. (Requires an understanding of XML.)</div> </div> <div> <div>1 column</div> <div>Applies a one-column layout to the category page.</div> </div> <div> <div>2 columns with left bar</div> <div>Applies a two-column layout with a left sidebar to the category page.</div> </div> <div> <div>2 columns with right bar</div> <div>Applies a two-column layout with a right sidebar to the category page.</div> </div> <div> <div>3 columns</div> <div>Applies a three-column layout to the category page.</div> </div>
Layout Update XML	Updates the theme layout with custom XML code.
Apply Design to Products	When selected, applies the custom settings to all products in the category.

## Category Permissions

Category access can be limited to specific customer groups, or restricted entirely. You can control the display of product prices, and determine which customer groups can add products to the cart, and specify the landing page.

Category Permissions has a global scope and when enabled, restricts access to each category according to its individual permissions. By default, Category Permissions is not enabled.


For example, if you sell only to wholesale customers, you can allow anyone to browse the catalog, but display prices and allow purchases only to those in the Wholesale customer group. In the following example, only logged in users have access to the “Collections” category. For guests, the “Collections” option doesn’t appear in the main menu.



*Only Logged-In Users See “Collections” Category*

When enabled, a new “Category Permissions” section appears on the Category page that allows you to apply the needed access for each category. You can add multiple permission rules to each category for different websites and customer groups.

### To apply category permissions:

1. Enable and configure Category Permissions.
2. On the Admin sidebar, tap **Products**. Then under Inventory, choose **Categories**.
3. In the category tree, select the target category.
4. Expand  the Category Permissions section, and do the following:

Category Permissions

Permissions do not depend on store views.

Website	Customer Group	Browsing Category	Display Product Prices	Add to Cart	Action
<input type="text" value="-- Please Select --"/>	<input type="text" value="-- Please Select --"/>	<input type="radio"/> Allow <input type="radio"/> Deny <input checked="" type="radio"/> Use parent	<input type="radio"/> Allow <input type="radio"/> Deny <input checked="" type="radio"/> Use parent	<input type="radio"/> Allow <input type="radio"/> Deny <input checked="" type="radio"/> Use parent	

New Permission

Category Permissions Section

- a. Choose the applicable **Website** and **Customer Group**.
- b. Set the individual permissions as needed.
5. To create another permissions rule, tap **New Permission**. Then, complete the settings.
6. When complete, tap **Save**.

**To configure category permissions:**

1. On the Admin sidebar, tap **Stores**. Then under Settings, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Catalog**.
3. Expand the **Category Permissions** section.
4. Set **Enable** to “Yes.” Then, configure the following as needed:

Category Permissions

Enable [global] No

**Warning!** By default this feature restricts all categories.

Allow Browsing Category [website] No, Redirect to Landing Page

Landing Page [store view] 404 Not Found

Display Product Prices [website] No

Allow Adding to Cart [website] No

Disallow Catalog Search By [website]

NOT LOGGED IN  
General  
Wholesale  
Retailer

Category Permissions

**Browsing Category**

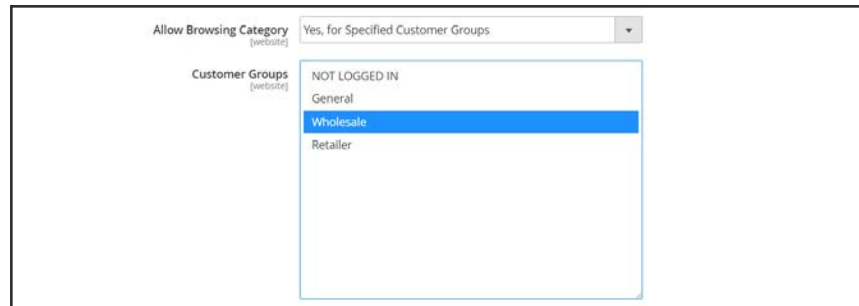
The Allow Browsing Category setting applies to all categories in the **website**.



### For Specific Customer Groups

To allow members of a specific customer group to browse through category products, do the following:

- a. Set **Allow Browsing Category** to “Specified Customer Groups”.
- b. In the **Customer Groups** box, select each group that is allowed to browse through products in the category. (For multiple options, hold down the Ctrl key, and click each group.)



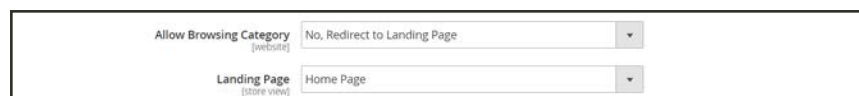
*Allow Browsing by Wholesale Customer Group*

### Redirect to Landing Page

The Allow Browsing Category setting applies to all categories in the **website**. However, a different Landing Page can be configured for each store view.

To restrict access and redirect to a landing page, do the following:

- a. Set **Allow Browsing Category** to “No, Redirect to Landing Page”.
- b. Choose the **Landing Page** to which visitors will be redirected.



*Redirect to Home Page*

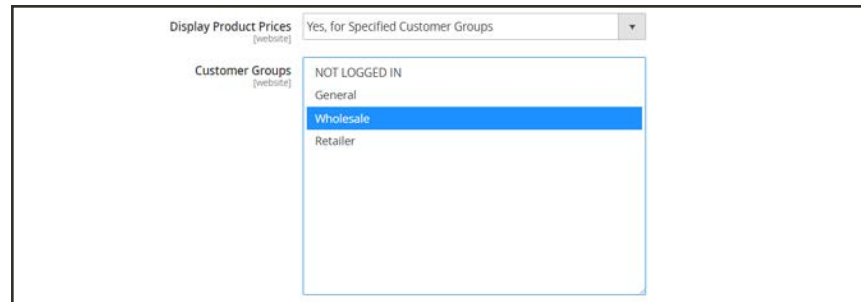
## Product Prices

The Display Product Prices setting applies to all categories in the **website**.

### For Specific Customer Groups

To allow only members of specific customer groups to see the price of products in the category, do the following:

- a. Set **Display Product Prices** to “Yes, for Specified Customer Groups”.
- b. In the **Customer Groups** box, select each group that is allowed to see the price of products in the category. (For multiple options, hold down the Ctrl key, and click each group.)



*Only Wholesale Customer Group Can See Prices*

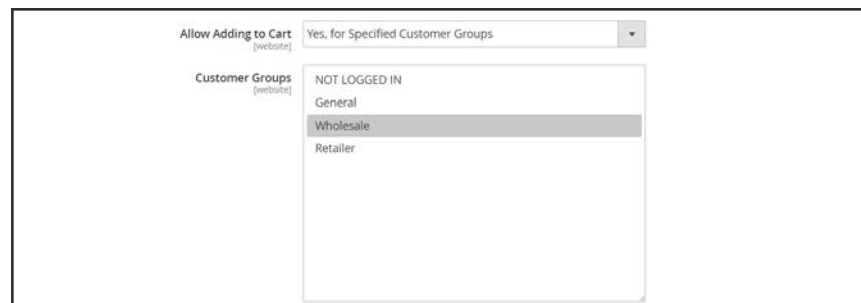
## Add to Cart

The Add to Cart setting applies to all categories in the [website](#).

### For Specific Customer Groups

To allow only members of specific customer groups to put category products into the shopping cart, do the following:

- a. Set **Allow Adding to Cart** to “Yes, for Specified Customer Groups”.
- b. In the **Customer Groups** box, select each group that is allowed to add products from the category to the cart. (For multiple options, hold down the Ctrl key, and click each group.)



*Only Wholesale Customer Group Can Put Product in Cart*

## Disallow Catalog Search

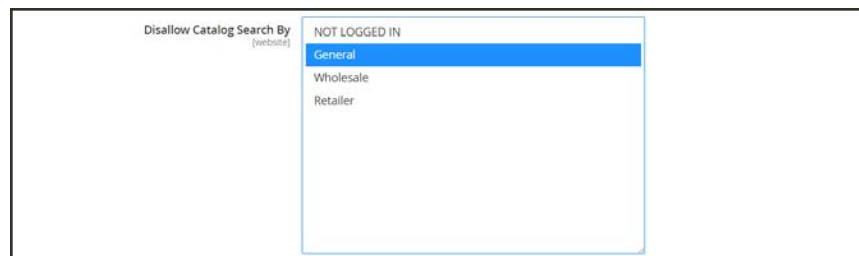
The Disallow Catalog Search setting prevents members of a specific customer group from using Catalog Search. The setting applies to all categories in the [website](#).

### For Guests

To allow only logged in customers to use Catalog Search, select “NOT LOGGED IN”.

### For Specific Customer Groups

In the **Disallow Catalog Search By** box, select each group to be prevented from using Category Search. (For multiple options, hold down the Ctrl key, and click each group.)



*Catalog Search Not Allowed for General Customer Group*

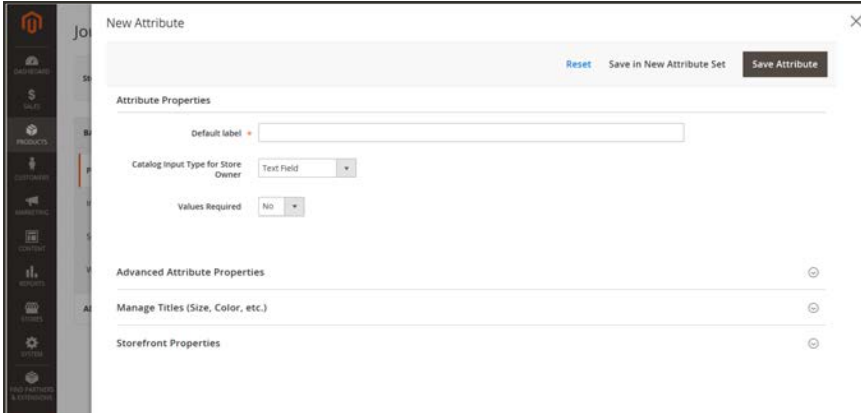
5. When complete, tap **Save Config**.
6. When prompted to update the cache, click the **Cache Management** link in the system message, and follow the instructions to refresh the cache.



## CHAPTER 18:

# Using Product Attributes

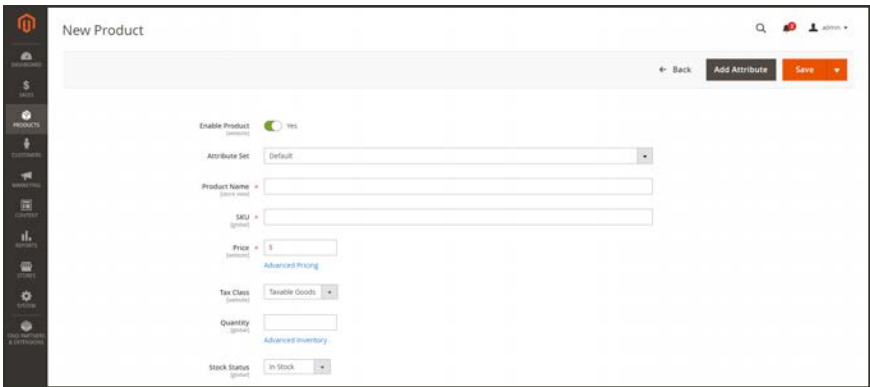
Attributes are the building blocks of your product catalog, and describe specific characteristics of a product. Attributes determine the type of input control that is used for product options, provide additional information for product pages, and are used as search parameters and criteria for layered navigation, product comparison reports, and promotions. You can create as many attributes as you need to describe the products in your catalog. Other attributes such as price, are built into the core Magento platform and are referred to as “system attributes.”



*Creating a New Attribute While Editing a Product*

# Adding an Attribute

Although attributes are managed from the Stores menu, you can also add new attributes “on the fly” while working on a product. You can choose from the list of existing attributes, or create a new attribute. The new attribute is added to the **attribute set** upon which the product is based.



Add Attribute

**Process Overview:**

Step 1: Add a New Attribute

Step 2: Describe the Basic Properties

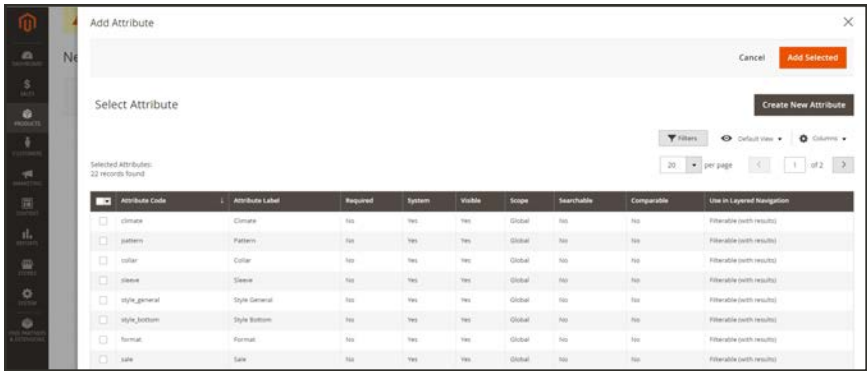
Step 3: Describe the Advanced Properties

Step 4: Enter the Field Label

Step 5: Describe the Frontend Properties

## Step 1: Add a New Attribute

1. Open the product in edit mode. Then in the upper-right corner, tap **Add Attribute**.



New Attribute

2. To add an existing attribute to the product, use the **filter controls** to find the attribute in the grid. Then, do the following:
  - a. Mark the checkbox in the first column of each attribute to be added.
  - b. Tap **Add Selected**.
3. To define a new attribute, tap **Create New Attribute**, and complete the following steps.

## Step 2: Describe the Basic Properties

1. Under **Attribute Properties**, enter a **Default Label** to identify the attribute.

2. Set **Catalog Input Type for Store Owner** to the type in **input control** to be used for data entry.  
If the attribute is used for a **configurable product**, choose “Dropdown.” Then, set **Required** to “Yes.”
3. For Dropdown and Multiple Select input types, do the following:
  - a. Under **Values**, tap **Add Value**.
  - b. Enter the first value that you want to appear in the list. You can enter one value for the Admin, and a translation of the value for each store view. If you have only one store view, you can enter only the Admin value and it will be used for the storefront as well.
  - c. Tap **Add Value** and repeat the previous step for each option that you want to include in the list.
  - d. Select **Is Default** to use the option as the default value.

Is Default	English	Admin	French	German	Spanish
<input checked="" type="radio"/>	Vanilla	Vanilla	Vanille	Vanille	Vainilla
<input type="radio"/>	Chocolate	Chocolate	Chocolat	Schokolade	Chocolate
<input type="radio"/>	Strawberry	Strawberry	Fraise	Erdbeere	Fresa

Add Value

Values

- 4. If you want to require the customer to choose an option before the product can be purchased, set **Required** to “Yes.”

**Step 3: Describe the Advanced Properties** (if needed)

- 1. Enter a unique **Attribute Code** in lowercase characters, and without spaces.

Attribute Code: flavor  
This is used internally. Make sure you don't use spaces or more than 30 symbols.

Scope: Global  
Declare attribute value saving scope.

Unique Value: No  
Not shared with other products.

Input Validation for Store Owner: None

Add to Column Options: Yes  
Add this attribute to the list of column options in the product grid.

Use in Filter Options: Yes  
Add this attribute to the list of filter options in the product grid.

Advanced Attribute Properties

- 2. Set **Scope** to indicate where in your store hierarchy the attribute can be used.  
If the attribute is used for a **configurable product**, choose “Global”.
- 3. If this attribute applies only to this product, set **Unique Value** to “Yes”.
- 4. To run a validity test of any data entered into a text field, set **Input Validation for Store Owner** to the type of data that the field should contain. This field is not available for input types with values that are selected. Input validation can be used for any of the following:



- Decimal Number
- Integer Number
- Email
- URL
- Letters
- Letters (a-z, A-Z) or Numbers (0-9)

 A screenshot of a web form showing a dropdown menu for 'Input Validation for Store Owner'. The dropdown is open, displaying a list of options: 'None' (highlighted in blue), 'Decimal Number', 'Integer Number', 'Email', 'URL', 'Letters', and 'Letters (a-z, A-Z) or Numbers (0-9)'. The background of the form is light gray.
*Input Validation*

5. If you want to be able to include the attribute as a column in the Products grid, set **Add to Column Options** to “Yes.”
6. If you want to be able to filter the Products grid by this column, set **Use in Filter Options** to “Yes.”

#### Step 4: Enter the Field Label

1. Expand ☏ the **Manage titles** section.
2. Enter a **Title** to be used as a label for the field. If your store is available in different languages, you can enter a translated title for each view.

 A screenshot of the 'Manage Titles' section in the Magento admin interface. The section is titled 'Manage Titles (Size, Color, etc.)' and has a collapse icon (☏) in the top right corner. Below the title, there is a section labeled 'Default Store View' which contains a text input field with the word 'Flavor' entered.
*Manage Titles*

#### Step 5: Describe the Storefront Properties

1. Expand ☏ the **Storefront Properties** section. Then, do the following:
  - a. To make the attribute available for search, set **Use in Search** to “Yes.”
  - b. To include the attribute in Product Compare, set **Comparable on Storefront** to “Yes.”

- c. To include dropdown, multiple select, or price attributes in layered navigation, set **Use in Search Results Layered Navigation** to one of the following:

Filterable (with results)

Layered navigation includes only those filters for which matching products can be found. Any attribute value that already applies to all products shown in the list does not appear as an available filter. Attribute values with a count of zero (0) product matches are also omitted from the list of available filters.

The filtered list of products includes only those that match the filter. The products list is updated only if the selected filter(s) change what is currently shown.

Filterable (no results)

Layered navigation includes filters for all available attribute values and their product counts, including those with zero (0) product matches. If the attribute value is a swatch, the value appears as a filter, but is crossed out.

- d. To use in layered navigation on search results pages, set **Use in Search Results Navigation** to “Yes.”
- e. In the **Position** field, enter a number to indicate the relative position of the attribute in the layered navigation block.
- f. To use the attribute in price rules, set **Use for Promo Rule Conditions** to “Yes.”
- g. To allow the text to be formatted with HTML, set **Allow HTML Tags on Storefront** to “Yes.”

This setting makes the WYSIWYG editor available when editing the field.

- h. To include the attribute on the product page, set **Visible on Catalog Pages on Storefront** to “Yes.”

2. Complete the following settings as supported by your theme:

- a. To include the attribute in product listings, set **Used in Product Listing** to “Yes.”
- b. To use attribute as a sort parameter for product listings, set **Used for Sorting in Product Listing** to “Yes.”

3. When complete, tap **Save Attribute**.

Storefront Properties

Use in Search

No

Comparable on Storefront

No

Use in Layered Navigation

No

Can be used only with catalog input type Dropdown, Multiple Select and Price.

Use in Search Results Layered Navigation

No

Can be used only with catalog input type Dropdown, Multiple Select and Price.

Position

Use for Promo Rule Conditions

No

Allow HTML Tags on Storefront

No

Visible on Catalog Pages on Storefront

Yes

Used in Product Listing

Yes

Depends on design theme.

Used for Sorting in Product Listing

No

Depends on design theme.

Storefront Properties

## Attribute Input Types

When viewed from the Admin, attributes are the fields that you complete when you create a product. The input type that is assigned to an attribute determines the type of data that can be entered and the format of the field or input control. From the standpoint of the customer, attributes provide information about the product, and are the options and data entry fields that must be completed to purchase a product.

### Attribute Input Types

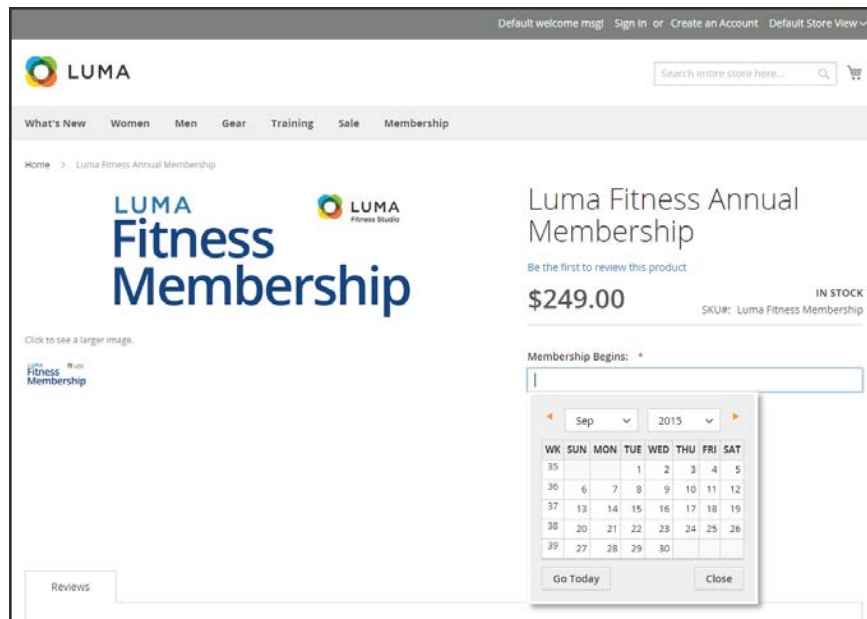
PROPERTY	DESCRIPTION
Text Field	A single line input field for text.
Text Area	A multiple-line input field for entering paragraphs of text such as a product description. You can use the WYSIWYG Editor to format the text with HTML tags, or type the tags directly into the text.
Date	Date values can be entered by making a selection from a drop-down list, or popup calendar (📅). Depending on your system configuration, dates can be typed directly into a field, or selected from the calendar or list. To format date and time values, see: <a href="#">Date &amp; Time Custom Options</a> .
Yes/No	Displays a drop-down list with pre-defined options of “Yes” and “No.”

**Attribute Input Types (cont.)**

PROPERTY	DESCRIPTION
Dropdown	Displays a drop-down list of values. Only one item can be selected at a time. The Dropdown input type is a key component of <b>configurable products</b> .
Multiple Select	Displays a drop-down list of values. To select more than one option, hold the Ctrl key down and click each item.
Price	This input type is used to create price fields that are in addition to the predefined attributes, Price, Special Price, Tier Price and Cost. The currency used is determined by your system configuration.
Media Image	Associates an additional image with a product, such as a product logo, care instructions, or ingredients from a food label. When you add a media image attribute to the attribute set of a product, it becomes an additional image type, along with Base, Small, and Thumbnail. The media image attribute can be excluded from the <b>media gallery</b> .
<b>Fixed Product Tax</b>	Lets you define FPT rates based on the requirements of your locale.
<b>Visual Swatch</b>	Displays a swatch that depicts the color, texture, or pattern of a configurable product. A visual swatch can be filled with a hexadecimal color value, or display an uploaded image that represents the color, material, texture, or pattern of the option.
<b>Text Swatch</b>	A text-based representation of a configurable product option that is frequently used for size. Text swatches can also include hexadecimal color values.

## Date & Time Options

You can customize the format of date and time fields, and select the input control that is used for data entry. Dates values can be selected from a drop-down list, or pop-up calendar.



*Pop-up Calendar*

### To format date/time fields:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, tap **Catalog**. Then, choose the **Catalog** option.
3. Expand the **Date & Time Custom Options** section.
4. To use a popup calendar as the input control for date fields, set **Use JavaScript Calendar** to “Yes.”
5. To establish the **Date Fields Order**, do the following:
  - a. Clear the **Use system value** checkbox.
  - b. Set the order of each part of the date field as needed:
    - Month
    - Day
    - Year
  - c. To set your preferred time format, do the following:
  - d. Clear the **Use system value** checkbox.
  - e. Set **Time Format** to one of the following:
    - 12h AM/PM
    - 24h
  - f. To establish the **Year Range** for the drop-down values, enter the year in “YYYY” format to set the **from** and **to** dates. If blank, the field defaults to the current year.

**Date & Time Custom Options**

Use JavaScript Calendar [store view] Yes

Date Fields Order [store view] Month / Day / Year ☒ Use system value

Time Format [store view] 12h AM/PM ☒ Use system value

Year Range [store view] from to  
Please use a four-digit year format.

### *Date & Time Custom Options*

6. When complete, tap **Save Config**.

# M ARKETING

## Contents

In this section of the guide, you'll learn how to leverage your store's built-in shopping tools to create opportunities for customer engagement, and how to set up targeted promotions with price rules. Leverage multiple sales channels by sending your product feeds to shopping sites and marketplaces. Then, use Google tools to analyze traffic, optimize your content, and plan your next campaign.

### Marketing Menu

#### Shopping Tools

Opportunities to Engage

Email a Friend

Wish Lists

Product Relationships

Compare Products

Recently Viewed / Compared Products

Product Reviews

#### Promotions

#### Merchandising

#### Communications

#### SEO & Search

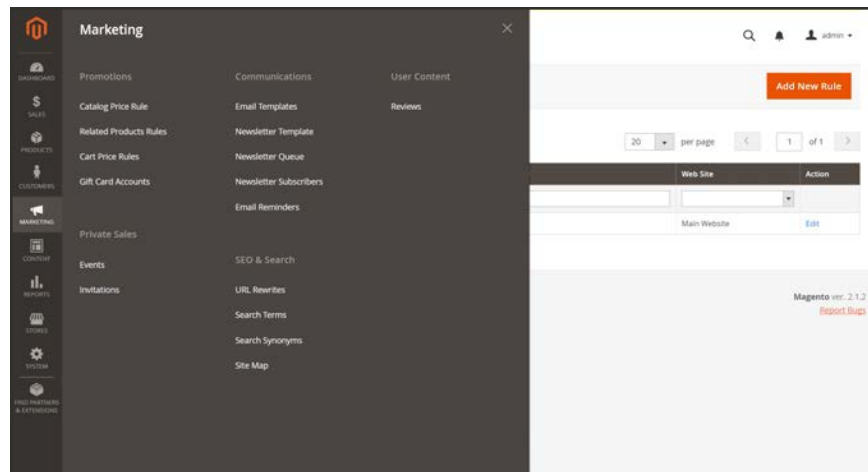
#### Google Tools



## CHAPTER 19:

# Marketing Menu

The Marketing menu provides access tools for managing promotions, communications, SEO, and user-generated content.



*Marketing Menu*

## To display the Marketing menu:

On the Admin sidebar, tap **Marketing**.

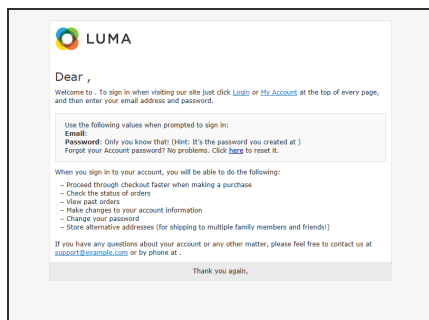
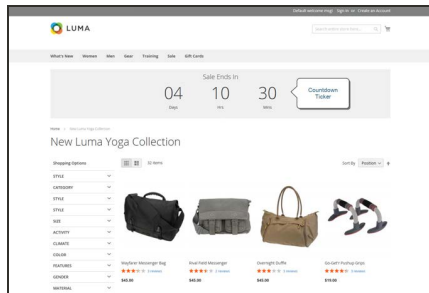


## Promotions

Create **catalog** and **cart** price rules that trigger discounts based on a variety of conditions. Set up promotions that spring into action when the required conditions are met. Create **related product rules** and manage **gift card accounts**.

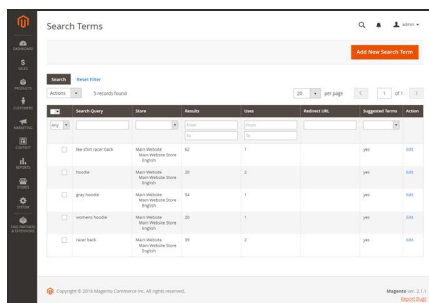
## Private Sales

Private sales and other catalog events are a great way to leverage your existing customer base to generate buzz and new leads with exclusive access for members only, or by invitation.



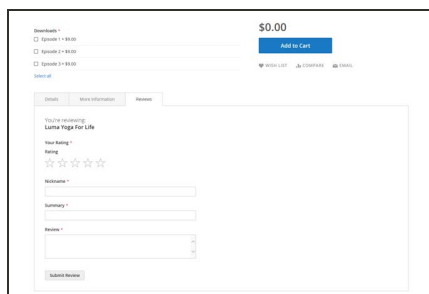
## Communications

Customize all notifications sent from your store. Create **newsletters** and publish **RSS** feeds. Set up rules that send **email reminders** to customers whenever the conditions are met.



## SEO & Search

Analyze **search terms** and synonyms to help customers find products in the store, manage **meta data**, and create a **site map**. Use **redirects** to manage URL changes and avoid broken links.



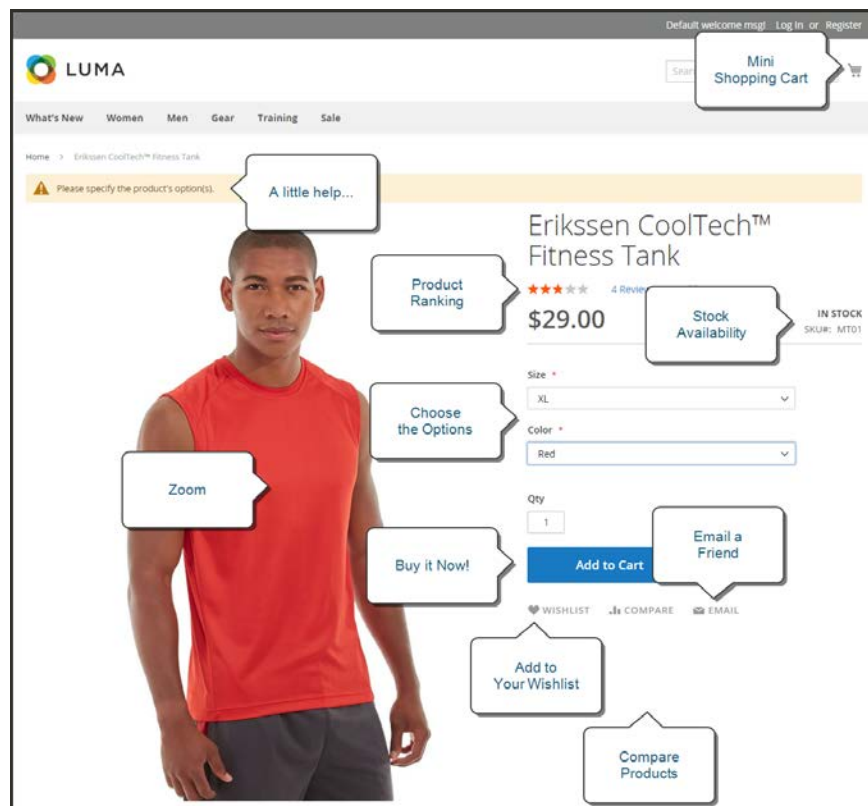
## User Content

Leverage user-generated product reviews to create a sense of community, and increase sales.

## CHAPTER 20:

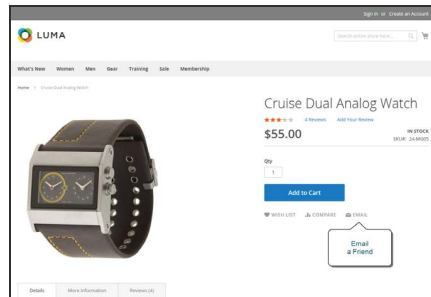
# Shopping Tools

Your store includes a set of shopping tools that create opportunities for customers to interact with your store, and share the experience with friends.



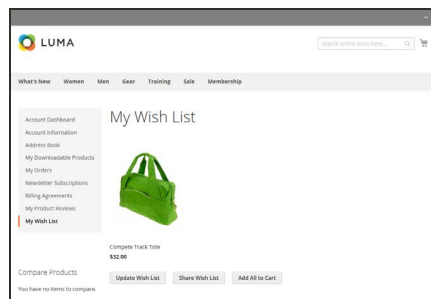
*Product Page*

# Opportunities to Engage



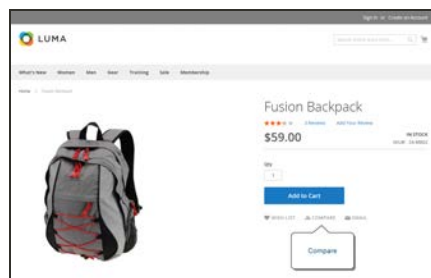
## Email a Friend

The Email a Friend link makes it easy for your customers to share links to products with their friends.



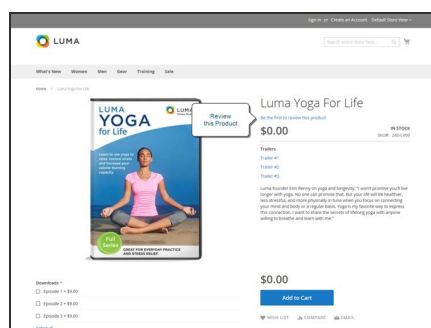
## Wish List

A wish list is a list of products that a registered customer can share with friends, or save to transfer to the cart at a later date.



## Compare Products

The Compare Products block lets your customers quickly compare the features of one product with another.

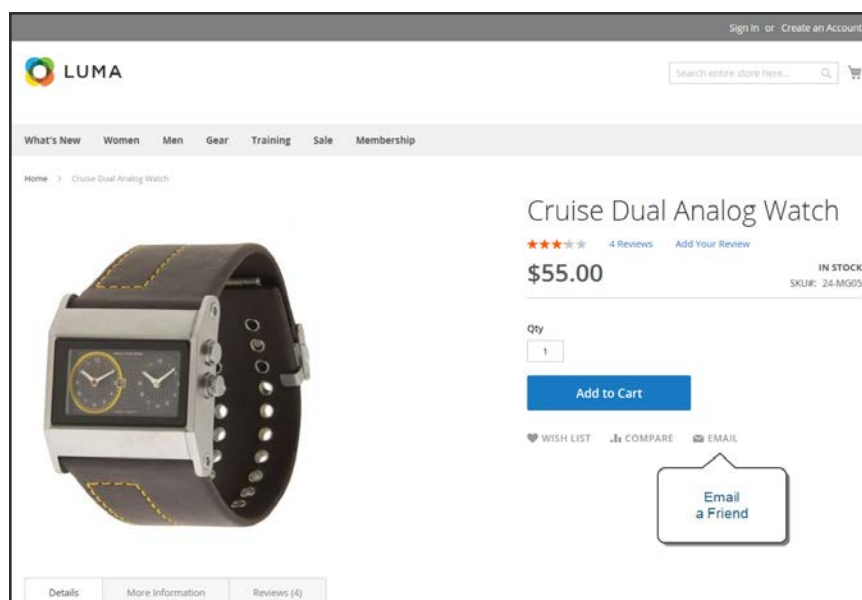


## Product Reviews

Product reviews help build a sense of community, and are considered to be more credible than any advertising money can buy.


## Email a Friend

The Email a Friend link makes it easy for your customers to share links to products with their friends. In the Magento demo store, the Email a Friend link appears as an envelope icon. The message template can be customized for your voice and brand. To prevent spamming, you can limit the number of recipients for each email, and the number of products that can be shared over a one-hour period.



*Email a Friend*

### To configure Email a Friend:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Email to a Friend**.
3. Expand  the **Email Templates** section. Then, do the following:

### *Email Templates*

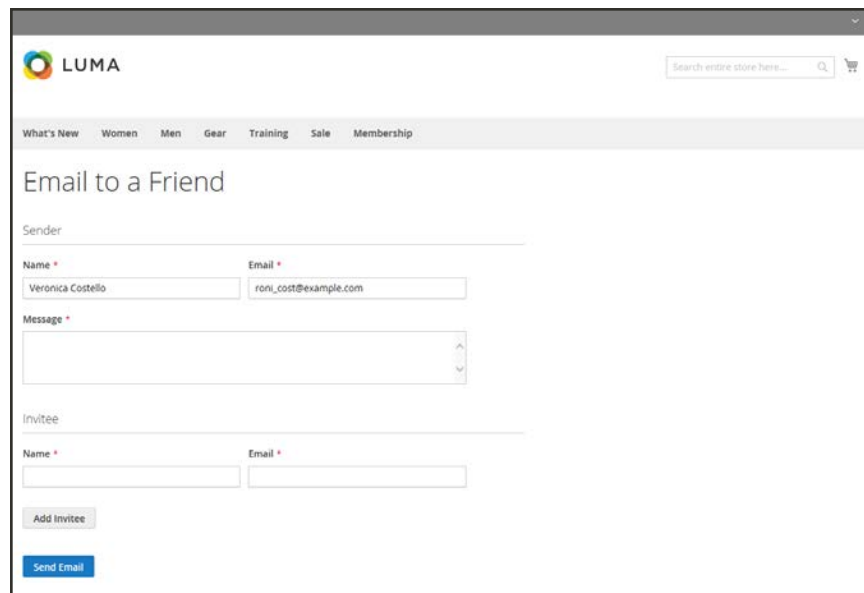
- a. Set **Enabled** to “Yes.”
  - b. Set **Select Email Template** to the template you want to use as the basis of the messages.
  - c. If you want to require that only registered customers can send email to friends, set **Allow for Guests** to “No.”
  - d. In the **Max Recipients** field, enter the maximum number of friends who can be on the distribution list for a single message.
  - e. In the **Max Products Sent in 1 Hour** field, enter the maximum number of products that can be shared by a single user with friends over a one-hour time period.
  - f. Set **Limit Sending By** to one of the following methods to identify the sender of emails:
 

IP Address	(Recommended) Identifies the sender by the IP address of the computer that is used to send the emails.
Cookie (unsafe)	Identifies the sender by browser cookie. This method is less effective because the sender can delete the cookie to bypass the limit.
4. When complete, tap **Save Config.**

### To send email to a friend:

1. On a catalog page, click the **Email a Friend** link. Then, do one of the following:
  - Log in to your customer account.
  - Sign up for a new account.
2. Complete the **Message** and enter the recipient **Name** and **Email Address**. To add more recipients, do the following:
  - a. Tap **Add Invitee**.
  - b. Enter the **Name** and **Email Address** of the additional person.

You can send the message to as many additional people as the configuration allows.
3. When ready to send the message, tap **Send Email**.

The screenshot shows the 'Email to a Friend' form in a web browser. At the top is the LUMA logo and a search bar. Below is a navigation menu with links: What's New, Women, Men, Gear, Training, Sale, and Membership. The main heading is 'Email to a Friend'. The form is divided into two sections: 'Sender' and 'Invitee'. The 'Sender' section has fields for 'Name' (containing 'Veronica Costello') and 'Email' (containing 'roni\_cost@example.com'), followed by a 'Message' text area. The 'Invitee' section has fields for 'Name' and 'Email'. At the bottom of the form are two buttons: 'Add Invitee' and 'Send Email'.

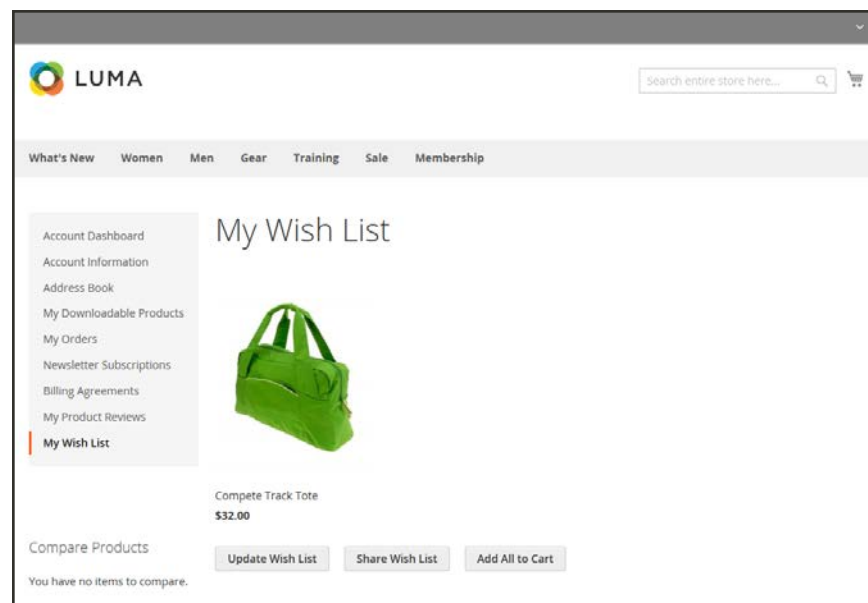
*Email a Friend Form*

## Wish Lists

A wish list is a list of products that a registered customer can share with friends, or save to transfer to the cart at a later date. When wish lists are enabled, the Add to Wishlist link appears on the category and product pages of each product in the store. Depending on the theme, it might be a text link or a graphic image.

Shared wish lists are sent from a store email address, but the body of the message contains a personalized note from the customer. You can customize the email template that is used when wish lists are shared, and choose the store contact that appears as the sender.

Wish lists can be updated from the dashboard of the **customer account**. Items can be added or transferred between the wish list and cart by the customer or by the store administrator.



*Wishlist in Customer Account*

When a product with multiple options is added to a wish list, any options that have been selected by the customer are included in the wish list item description. For example, if the customer adds the same pair of shoes, but in three different colors, each pair appears as a separate wish list item. On the other hand, if the customer adds the same product to the wish list multiple times, the product appears only once, but with an updated quantity that reflects the number of times the product was added.



## Configuring Wish Lists

The configuration enables wish lists, and determines the email template and sender of email messages that are used when a wish list is shared.

### To configure the wish list:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Customers**, choose **Wish List**.
3. Expand ☯ the **General Options** section. Then, verify that **Enabled** is set to “Yes.”

The screenshot shows the 'General Options' section of the configuration interface. It features a toggle switch for 'Enabled' which is currently set to 'Yes'. Below the toggle, there is a checkbox labeled 'Use system value' which is checked.

### General Options


4. Expand ☯ the **Share Options** section. Then, do the following:

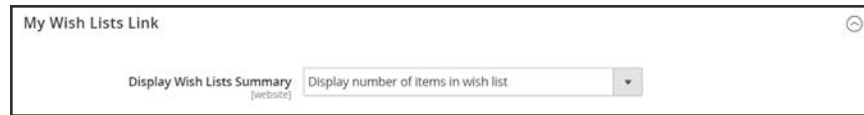
The screenshot shows the 'Share Options' section of the configuration interface. It contains four settings, each with a dropdown menu and a 'Use system value' checkbox:

- Email Sender**: Set to 'General Contact'. The checkbox 'Use system value' is checked.
- Email Template**: Set to 'Wish List Sharing (Default)'. The checkbox 'Use system value' is checked. Below the dropdown, a note states: 'Email template chosen based on theme fallback when "Default" option is selected.'
- Max Emails Allowed to be Sent**: Set to '10'. The checkbox 'Use system value' is checked. Below the input, a note states: '10 by default. Max - 10000'.
- Email Text Length Limit**: Set to '255'. The checkbox 'Use system value' is checked. Below the input, a note states: '255 by default'.

### Share Options

- a. Set **Email Sender** to the store contact that appears as the sender of the message.
- b. Set **Email Template** to the template to be used when a customer shares a wish list.
- c. To limit the number of emails a customer can send in a batch, enter the **Max Emails Allowed to be Sent**. The default value is 10, and the maximum allowed is 10,000.
- d. To limit the size of the message, enter the **Email Text Length Limit**. The default value is 255.

5. Expand  the **My Wish List Link** section. Then, set **Display Wish List Summary** to one of the following:
- Display number of items in wish list
  - Display item quantities

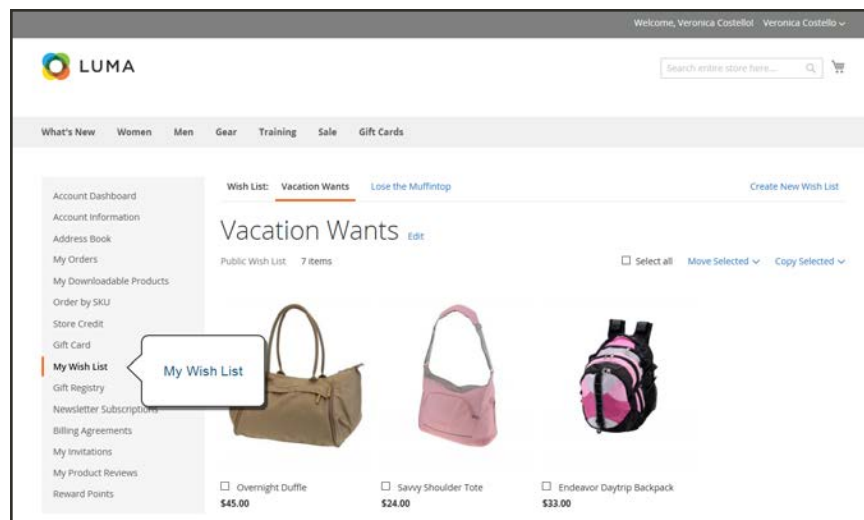


*My Wish List Link*

6. When complete, tap **Save Config.**

## Updating Wish Lists

Customers can manage their wish lists by logging in to their accounts. Store administrators can also manage customer wish lists from the Admin.



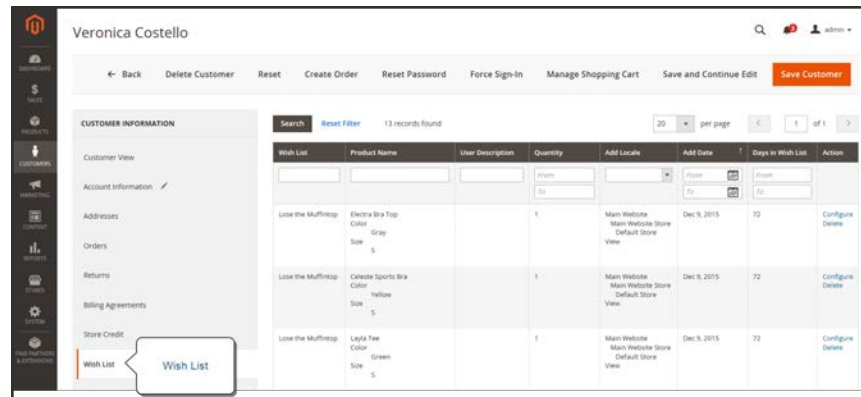
*"My Wish List" in Customer Account*

**To update the wish list from a customer account:**

1. Log in to your customer account. Then in the panel on the left, choose **My Wish List**.
2. Find the item you want to edit in the wish list, and do any of the following:
  - Update the Qty.
  - Edit the product options.
  - Add a comment.
  - Add to Gift Registry.
  - Move or Copy to a New Wish List.
  - Delete the item from the wish list.
  - Add to Cart
3. When complete, tap **Update Wishlist**.

### To update wish list items from the Admin:

1. On the Admin sidebar, tap Customers. Then choose **All Customers**.
2. Find the customer in the list. Then in the **Action** column, click **Edit**.
3. In the panel on the left, choose **Wish List**. Then, find the item to be edited in the list. Any options selected for the product appear below the product name.

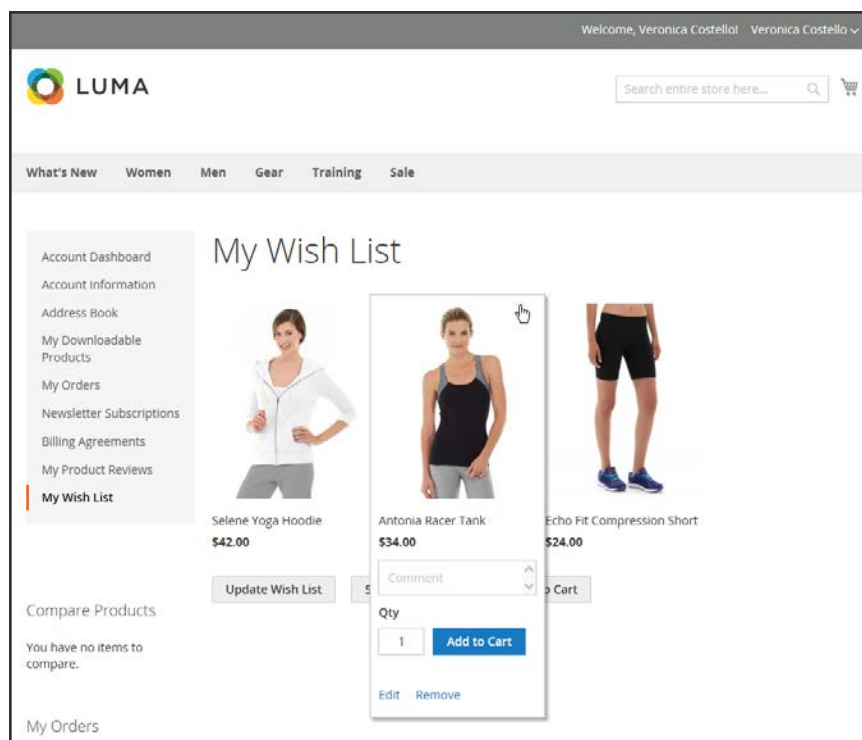


*Wish List from Admin*

4. To edit the product options, do the following:
  - a. In the **Action** column, click **Configure**.
  - b. Click **Configure**.
  - c. On the product page, update the options and **Quantity** as needed.
5. When complete, tap **Update Wishlist**.

## Sharing a Wish List

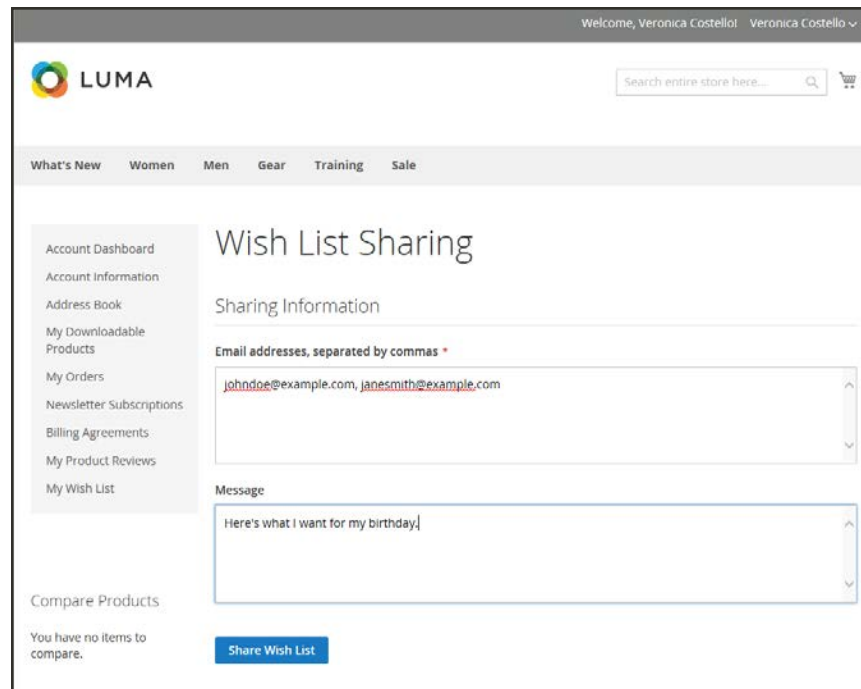
Customers can manage their wish lists from the dashboard of their accounts. Store administrators can also help customers manage their wish lists from the Admin.



*Customer Dashboard with Wish List*

### To share your wish list:

1. In the panel on the left of your customer account dashboard, choose **My Wish List**.
2. To add a comment to a specific item, hover over the image. Then type your **Comment** in the box.
3. To share your wish list, do the following:
  - a. Tap **Share My Wish List**.
  - b. Enter the email address of each recipient, separated by a comma.
  - c. Enter a **Message** for the body of the email.
4. When you're ready to send the message, tap **Share Wish List**.



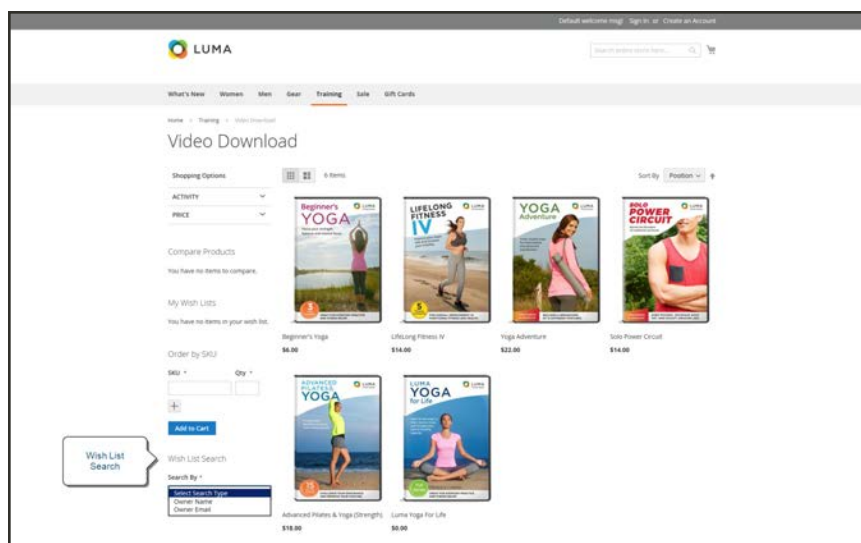
*Customer Dashboard with Wish List*

### To transfer an item to your cart:

1. To add a single item, do the following:
  - a. Hover over the item.
  - b. Enter the **Qty** that you want to add to the cart.
  - c. Tap **Add to Cart**.
2. To transfer all wish list items to the cart, tap **Add All to Cart**.

## Wish List Search

Any public wish list can be found using the Wish List Search **widget**. The widget enables a customer to search by the name or email address of the wish list owner. Store customers can find wish lists that belong to other customers, view them and order products from them, or add the products to their own wish lists. If an item it purchased from a public wish list by another customer, it is not removed from the original wish list. The Wish List Search widget can be added to any page of your store to make it easy for customers to find the wish lists of friends and family members.



*Wish List Search*

### To add a Wish List Search widget:

1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Widgets**.
2. In the upper-right corner, tap **Add Widget**. Then, in the **Settings** section, do the following:
  - a. Set **Type** to “Wishlist Search.”
  - b. Set **Design Package/Theme** to the theme of the store where the wishlist will be added.
  - c. Enter the **Widget Title**.
  - d. Set **Assign to Store Views** to the view or website where the widget is to be used.
  - e. In the **Layout Updates** section, tap **Add Layout Update**. Then, specify where you want the widget to appear.

### *Layout Update*

3. In the panel on the left, choose **Widget Options**. Then, do the following:
4. Set **Quick Search Form Types** to one of the following:

All Forms	Customers can search by all available parameters.
Owner Name	Customers can search for wish lists by owner name.
Owner Email	Customers can search for wish lists by owner email address.

Shipping addresses are not included in wish lists.

5. Configure the remaining widget properties as needed, following the standard **instructions**.
6. When complete, tap **Save**.
7. When prompted, refresh all invalid caches.



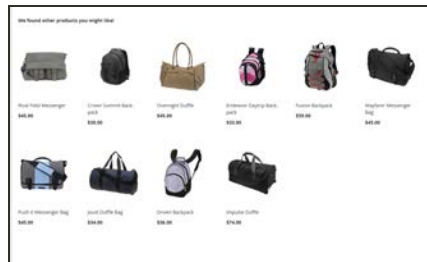
## Product Relationships

Products in your catalog can be promoted on other pages by defining the nature of the relationship between the products. The options available are: Up-sell products, Related products, and Cross-sell products.



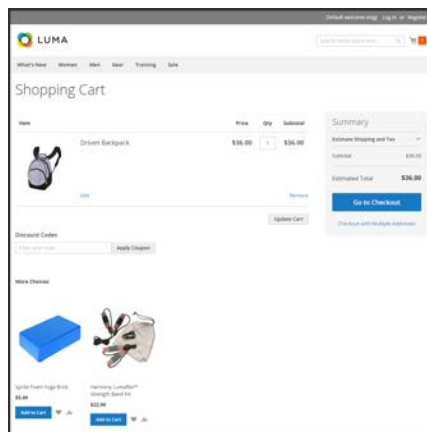
### Related Products

Related products are meant to be purchased in addition to the item the customer is viewing. They complement, enhance, or add optional features to the product.



### Up-sells

Up-sell products are items that are similar, but are perhaps of a higher-quality, more popular, or have a better profit margin than the item the customer is considering.



### Cross-sells

Cross-sell products are offered on the shopping cart page as last-minute purchases before the checkout process begins.



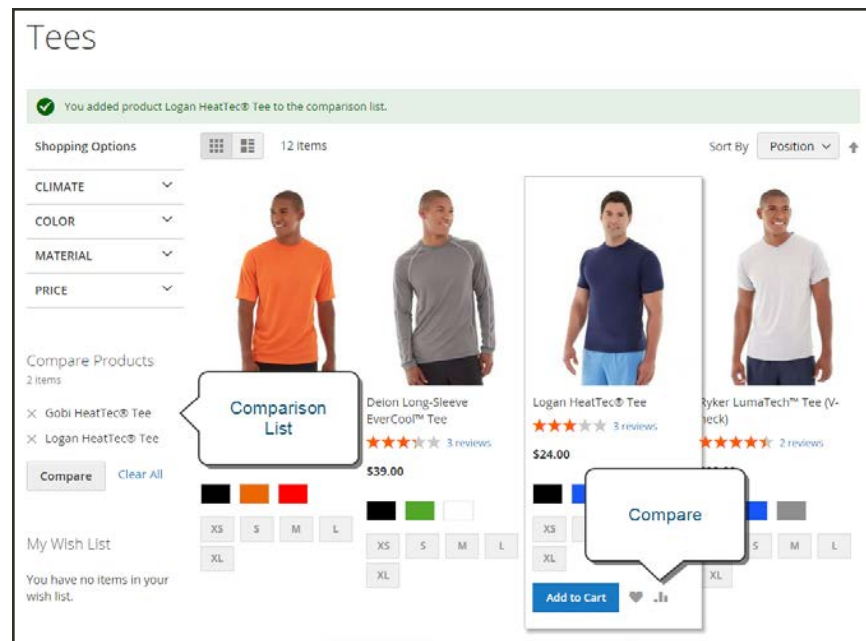
### Related Product Rules

Related product rules give you the ability to target the selection of products that are presented to customers as related products, up-sells, and cross-sells.

## Compare Products

Compare Products generates a detailed, side-by-side comparison of two or more products. Depending on the theme, the Add to Compare link might be represented by an icon or text. The Compare Products block might appear in either the left or right sidebar of a catalog page.


Unlike the [Recently Viewed / Compared Products](#) block, the Admin does not include additional configuration settings for Compare Products.



*Compare Products*

### To compare products:







1. From your storefront, find the products that you want to compare, and click the **Compare** link for each.
2. Depending on the theme and page layout, there might be a Compare Products block in the sidebar. If so, you can mark the checkbox of the products to include in the report, and tap **Compare**. The Compare Products report opens in a new window.
3. To print the report, tap **Print This Page**.
4. After navigating to other pages, you can click the link in the header or sidebar to return to the report.
  - To remove a single product from the report, tap **Delete** (✕).
  - To remove all products from the report, click the **Clear All** link.


**LUMA**

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## Compare Products

[Print This Page](#)

	<div>×</div> <div>  </div> <div> <b>Gobi HeatTec® Tee</b>   3 Reviews            \$29.00  <a href="#">Add to Cart</a>   </div>	<div>×</div> <div>  </div> <div> <b>Logan HeatTec® Tee</b>   3 Reviews            \$24.00  <a href="#">Add to Cart</a>   </div>
<b>SKU</b>	MS04	MS10
<b>Description</b>	<p>When the training gets intense, the Gobi HeatTec® Tee works as hard as you do to maintain your cool. The moisture-wicking material promises drier comfort, while breathable side panels deliver extra stretch that's sure to keep you moving.</p> <ul style="list-style-type: none"> <li>• Orange micropolyester shirt.</li> <li>• HeatTec® wicking fabric.</li> <li>• Crew neckline.</li> <li>• Machine wash/dry.</li> </ul>	<p>Soft and lightweight, the Logan HeatTec® Tee gets you through the long haul in total comfort. It boasts superior sweat-wicking performance to keep skin dry and cool, and strategic flat-lock seams to resist chafing.</p> <ul style="list-style-type: none"> <li>• Semi-fitted.</li> <li>• Crew neckline.</li> <li>• Machine wash/tumble dry.</li> </ul>

*Compare Products*

## Recently Viewed / Compared Products

The Recently Viewed and Recently Compared blocks usually appear in the right sidebar of a catalog page. The number of products listed in each block can be configured for each website, store, or store view.

### To configure Recently Viewed/Compared Products:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Catalog**.
3. Expand ☑ the **Recently Viewed/Compared Products** section. Then, do the following:

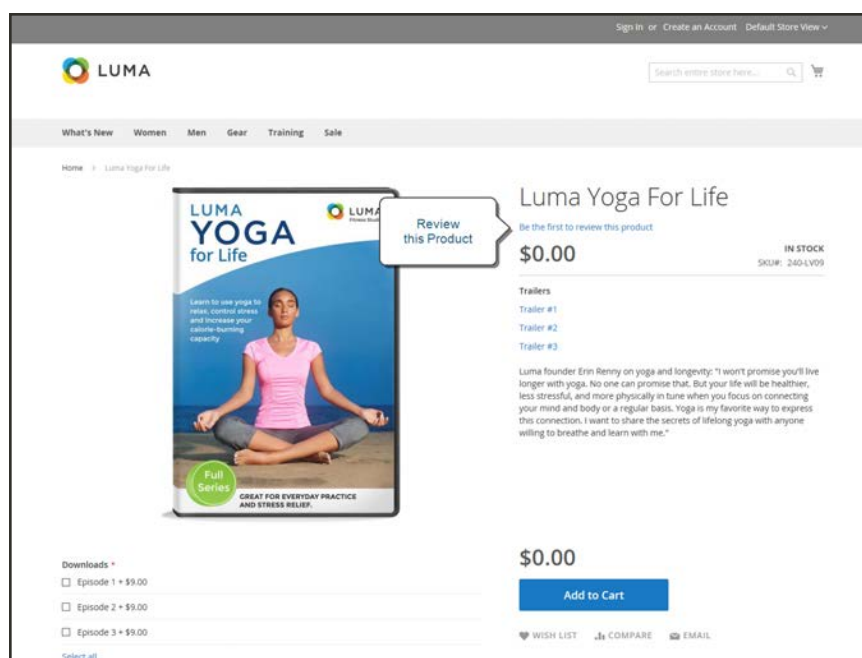
### *Recently Viewed/Compared Products*

- a. Set **Show for Current** to the website, store, or store view where the configuration applies.
  - b. In the **Default Recently Viewed Products Count** field, enter the number of recently viewed products to appear in the list.
  - c. In the **Default Recently Compared Products Count**, enter the number of recently compared products to appear in the list.
4. When complete, tap **Save Config**.

## Product Reviews

Product reviews help to build a sense of community, and are considered more credible than any advertising money can buy. In fact, some search engines give sites with product reviews a higher ranking than those without. For those who find your site by searching for a specific product, a product review is essentially the landing page of your store. Product reviews help people find your store, keep them engaged, and often lead to sales.

The configuration determines whether customers must open an account with your store before writing product reviews, or if they can submit reviews as guests. Requiring reviewers to open an account prevents anonymous submissions, and improves the quality of reviews.



### *Add Your Review*

Customers can write reviews for any product in your catalog. Reviews can be written from the product page by clicking the “Add Your Review” link. For products that haven't been reviewed, the link says, “Be the first to review this product.” The Reviews tab lists all current reviews, and the form that is used to submit a review.

The number of stars indicates the satisfaction rating. Visitors can click the link to read the reviews and write their own. As an incentive, customers can receive reward points for submitting a review. When a review is submitted, it is sent to the Admin for moderation. When approved, the review is published in your store.

Downloads +

☐ Episode 1 + \$9.00

☐ Episode 2 + \$9.00

☐ Episode 3 + \$9.00

[Select all](#)

\$0.00

[Add to Cart](#)

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

Details More Information **Reviews**

You're reviewing:  
**Luma Yoga For Life**

Your Rating +

Rating

☆☆☆☆☆

Nickname +

Summary +

Review +

[Submit Review](#)

*Reviews Tab***To configure product reviews:**

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Catalog**, select **Catalog**.
3. Expand the **Product Reviews** section.
4. Set **Allow Guests to Write Reviews** according to your preference.
5. When complete, tap **Save Config**.

**To moderate reviews:**

1. On the Admin sidebar, tap **Marketing**. Then under **User Content**, choose **Reviews**.
2. In the list, click a pending review to view the details, and edit if necessary.
3. To approve a pending review, change the **Status** from “Pending” to “Approved.” To reject a review, select “Not Approved.”
4. When complete, tap **Save Review**.

## Product Ratings

When customers review a product, the default ratings are quality, price, and value. In addition to these, you can add your own custom ratings. The five-star ratings that appear on catalog pages are averaged for each product.

The screenshot shows a product review form for 'Mach Street Sweatshirt'. It includes tabs for 'Details', 'Additional Information', and 'Reviews'. The 'Reviews' tab is active, showing a section for 'Your Rating' with five categories: Quality (5 stars), Price (4 stars), Value (4 stars), Coolness Factor (5 stars), and a Nickname field. Below these are fields for 'Summary' and 'Review', and a 'Submit Review' button.

*Ratings*

### To create your own ratings:

1. On the Admin sidebar, tap **Stores**. Then under **Attributes**, choose **Ratings**.
2. In the upper-right corner, tap **Add New Rating**.

The screenshot shows the 'Ratings' page in the Magento Admin. It includes a sidebar with navigation options like Dashboard, Sales, Products, Customers, Marketing, Content, Reports, Stores, System, and Third Parties & Extensions. The main content area shows a table of ratings with columns for ID, Rating, Sort Order, and Is Active. There are 4 records found, and a 'Add New Rating' button is in the top right corner.

ID	Rating	Sort Order	Is Active
3	Price	0	Active
1	Quality	0	Active
4	Rating	0	Active
2	Value	0	Active

*Ratings*

- 3. In the Rating Title section, enter the **Default Value** for the new rating. If applicable, enter the translation for each store view.

Rating Title

Default Value \*

Default Store View

French

German

Spanish

Rating Title

- 4. In the Rating Visibility section, set **Visibility In** to the store view where the rating is to be used. (Hold down the Ctrl key to select multiple options.)

Ratings are not visible unless assigned to a store view.

- 5. In the **Sort Order** field, enter a number to determine the order of this rating when listed with others.

Rating Visibility

Visibility

Main Website

Main Website Store

Default Store View

French

German

Spanish

?

Is Active

☐

Sort Order

Rating Visibility

- 6. When complete, tap **Save Rating**.



# P romotions

## Contents

In this section of the guide, you will learn how to set up product relationships, and use price rules to trigger discounts based on a variety of conditions. You can use price rules to offer customer incentives, such as to:

- Send your best customers a coupon for a discount on a specific product
- Offer free shipping for purchases over a certain amount
- Schedule a promotion for a period of time

### Catalog Price Rules

#### Multiple SKUs

### Cart Price Rules

#### Coupon Codes

#### Coupon Report

#### Free Shipping Promotion

#### Buy X Get Y Free

#### Discount with Minimum Purchase

### Related Product Rules

#### Creating a Related Product Rule

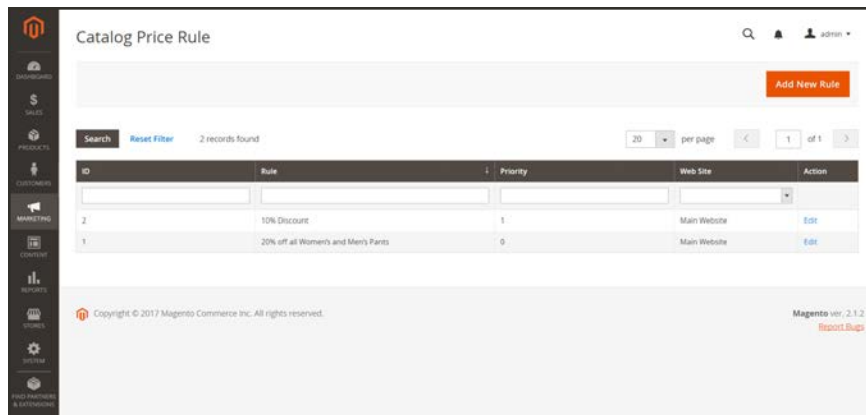
#### Priority

#### Configuration

## CHAPTER 21:

# Catalog Price Rules

Catalog price rules can be used to selectively offer products at a discounted price, based on a set of conditions. Catalog price rules do not use coupon codes, because they are triggered before a product is placed into the shopping cart.



The screenshot shows the 'Catalog Price Rule' management interface in Magento. It includes a sidebar with navigation links, a main content area with a search bar and a table of rules, and a footer with copyright information.

ID	Rule	Priority	Web Site	Action
2	10% Discount	1	Main Website	<a href="#">Edit</a>
1	20% off all Women's and Men's Pants	0	Main Website	<a href="#">Edit</a>

*Catalog Rules*

## Creating a Price Rule

### Process Overview:

- Step 1: [Add a New Rule](#)
- Step 2: [Define the Conditions](#)
- Step 3: [Define the Actions](#)
- Step 4: [Add Related Banners](#) (Optional)
- Step 5: [Schedule the Rule](#)
- Step 6: [Save and Test the Rule](#)

### Step 1: Add a New Rule

1. On the Admin sidebar, tap **Marketing**. Then under **Promotions**, choose **Catalog Price Rule**.
2. In the upper-right corner, tap **Add New Rule**.

The form opens to the Rule Information section, with expandable sections below for Conditions and Actions.

*Rule Information*

3. In the **Rule Information** section, do the following:
  - a. Complete the **Rule Name** and **Description** fields. These fields are for your internal reference only.
  - b. Select the **Websites** where the rule is to be available.
  - c. Select the **Customer Groups** to which this rule applies.

To choose multiple groups, hold down the Ctrl key, and click each option.

- d. Enter a number to establish the **Priority** of this rule in relation to other rules.

## Step 2: Define the Conditions


Most of the available conditions are based upon existing attribute values. To apply the rule to all products, leave the conditions blank.

1. Scroll down to **Conditions**, and expand  the section. The first rule begins:

Conditions (don't add conditions if rule is applied to all products)

---

If **ALL** of these conditions are **TRUE** :




Condition - Line 1

The statement has two bold links, which when tapped, display the options for that part of the statement. If you save the condition without making additional selections, the rule applies to all products.

- Tap the **ALL** link, and chose either “ALL” or “ANY.”
- Tap the **TRUE** link, and choose either “TRUE” or “FALSE.”
- To apply the rule to all products, leave the condition unchanged.

You can create different conditions by changing the combination of these values. For this example, the following condition is used:

If ALL of these conditions are TRUE:

2. Tap the **Add** (  ) button at the beginning of the next line.
- a. In the list under **Product Attribute**, choose the attribute that you want to use as the basis of the condition. For this example, the condition is "Attribute Set."

Conditions (don't add conditions if rule is applied to all products)

---

If A

Please choose a condition to add.

Conditions Combination
Product Attribute
Activity
Attribute Set
Category
Category Gear
Climate
Collar
Color

Condition Line 2, Part 1

For an attribute to appear in the list, it must be configured to be used in promo rule conditions. To learn more, see: [Product Attributes](#).

The selected condition appears in the statement, followed by two more bold links. The statement now says:

If ALL of these conditions are TRUE:  
Attribute Set is ...

- b.** Tap the **is** link, and choose the comparison operator that describes the condition to be met. In this example, the options are “is” and “is not.”
- c.** Tap the (...) “more” link, and choose the attribute set upon which the condition is based.


Conditions (don't add conditions if rule is applied to all products)

If **ALL** of these conditions are **TRUE**:  
Attribute Set **is** Default

*Condition Line 2, Part 3*

The selected item appears in the statement to complete the condition.

If ALL of these conditions are TRUE:  
Attribute Set is Default

- 3.** To add another line to the statement, tap the **Add** (  ) button, and choose one of the following:
  - Conditions Combination
  - Product Attribute

Then, repeat the process until the condition is complete.

If at any time you want to delete part of the statement, tap the **Delete** (  ) button at the end of the line.

Step 3: Define the Actions

1. Expand  the **Actions** section, and do the following:

Actions

Apply

Apply as percentage of original

Discount Amount \*

Discard subsequent rules

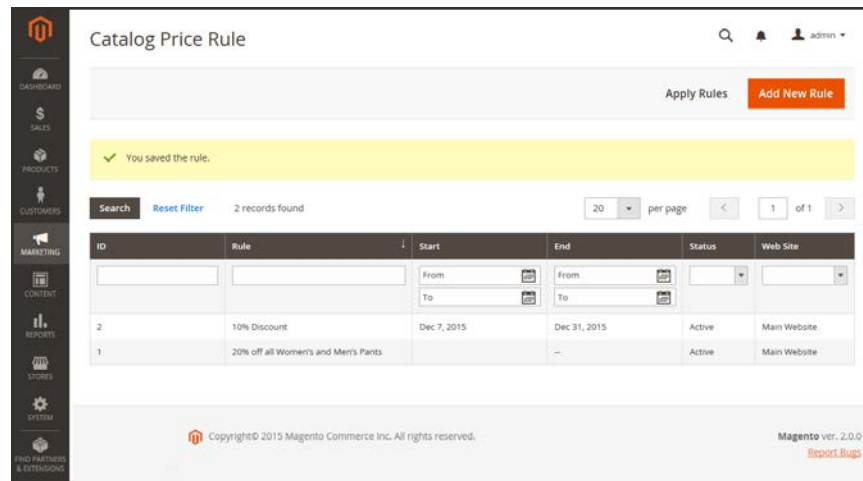
No

Actions

2. Under **Pricing Structure Rules**, set **Apply** to one of the following:

Apply as percentage of original	Discounts item by subtracting a percentage from the original price. For example: Enter 10 in Discount Amount for an updated price that is 10% less than the original price.
Apply as fixed amount	Discounts item by subtracting a fixed amount from original price. For example: Enter 10 in Discount Amount for an updated price that is \$10 less than the original price.
Adjust final price to this percentage	Discounts item by defining the final price based on percentage. For example: Enter 10 in Discount Amount for an updated price that is 10% of the original price.
Adjust final price to discount value	Sets the price to a fixed amount.

3. Enter the **Discount Amount**.
4. To stop processing other rules after this rule is applied, set **Discard Subsequent Rules** to “Yes.” This safeguard prevents customers from receiving multiple discounts for the same product.



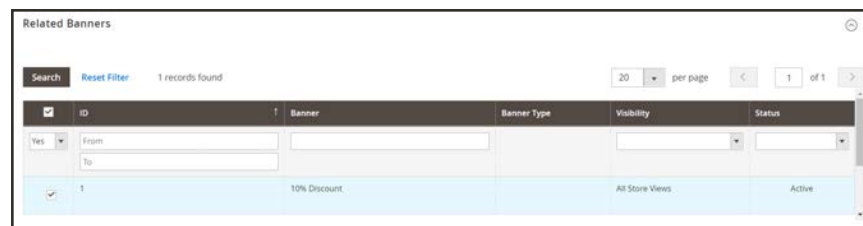
### Pricing Structure Rules

#### Step 4: Add Related Banners (optional)

**Banners** that are associated with the rule appear in the storefront whenever the conditions are met.

1. Expand ☺ the **Related Banners** section.
2. Use the **search filters** to locate the banner(s) that you want to associate with the rule.
3. Mark the checkbox in the first column to associate the banner with the rule.

To learn more, see: [Using Banners in Price Rules](#).



### Related Banners

#### Step 5: Schedule the Rule

1. Tap **Save and Continue Edit**.

The Scheduled Changes timeline appears at the top of the page.



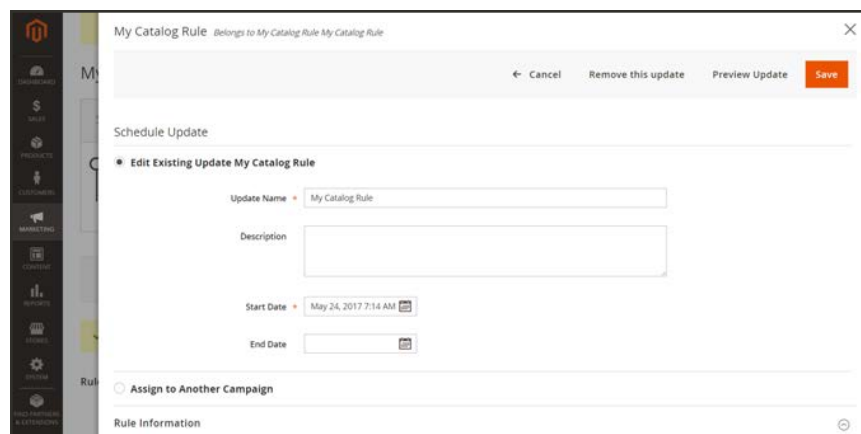
*Scheduled Changes*

2. In the
3. o Scheduled Changes box, click **View/Edit**.

You can either edit the existing update, or assign the catalog price rule to another campaign. The Edit Existing Update option is selected by default.

4. To schedule the rule, enter the **Start Date** and **End Date** that the price rule is to be active. You can either enter the dates, or choose the dates from the **Calendar** (📅).

To learn more, see: [Catalog Price Rule Scheduled Changes](#).

*Update Schedule*

## Step 6: Save and Test the Rule

1. When complete, tap **Save Rule**.
2. Test the rule to make sure that it works correctly.

When you create a new price rule, it might take an hour or so to become available. Make sure to allow enough time for it to get into the system. Then, test the rule to make sure that it works correctly. Unless otherwise specified, price rules are automatically processed with other system rules each night. As new rules are added, Magento recalculates the prices and the priorities accordingly.

## Field Descriptions

FIELD	DESCRIPTION								
<b>RULE INFORMATION</b>									
Rule Name	(Required) The name of the rule is for internal reference.								
Description	A description of the rule should include the purpose of the rule, and explain how it is used.								
Websites	(Required) Identifies the websites where the rule can be used.								
Customer Groups	(Required) Identifies the customer groups to which the rule applies.								
Priority	A number that indicates the priority of this rule in relation to others. The highest priority is number 1.								
<b>CONDITIONS</b>									
	Specifies the conditions that must be met before the catalog price rule goes into action. If left blank, the rule applies to all products.								
<b>ACTIONS</b>									
Apply	<p>Determines the type of calculation that is applied to the purchase. Options:</p> <table> <tr> <td>Apply as percentage of original</td><td>Applies the discount amount as a percentage of the original price.</td></tr> <tr> <td>Apply as fixed amount</td><td>Applies the discount amount as a fixed amount less than the original price.</td></tr> <tr> <td>Adjust final price to this percentage</td><td>Adjusts the final price by a percentage based on the discount amount.</td></tr> <tr> <td>Adjust final price to discount value</td><td>Uses the discount amount as the product price.</td></tr> </table>	Apply as percentage of original	Applies the discount amount as a percentage of the original price.	Apply as fixed amount	Applies the discount amount as a fixed amount less than the original price.	Adjust final price to this percentage	Adjusts the final price by a percentage based on the discount amount.	Adjust final price to discount value	Uses the discount amount as the product price.
Apply as percentage of original	Applies the discount amount as a percentage of the original price.								
Apply as fixed amount	Applies the discount amount as a fixed amount less than the original price.								
Adjust final price to this percentage	Adjusts the final price by a percentage based on the discount amount.								
Adjust final price to discount value	Uses the discount amount as the product price.								
Discount Amount	(Required) The amount of discount that is offered.								
Discard Subsequent Rules	Determines if additional rules can be applied to this purchase. To prevent multiple discounts from being applied to the same purchase, select "Yes." Options: Yes / No								
<b>RELATED BANNERS</b>									
	Identifies any banner(s) that are associated with the rule.								

## Catalog Price Rule Scheduled Changes

The Scheduled Changes box appears at the top of the page when a new price rule is saved for the first time. Catalog price rules can be applied on schedule, and grouped with other content changes. You can create a new campaign based on scheduled changes to a price rule, or apply the changes to an existing campaign.

If there are multiple price rules running in the same campaign, the Priority setting of the price rule determines which rule takes precedence. To learn more, see: [Content Staging](#).

If a campaign that includes a price rule is initially created without an end date, the campaign cannot later be edited to include an end date. It is recommended that you either add an end date when you create the campaign, or create a duplicate version of the existing campaign and add the end date to the duplicate as needed.

The screenshot shows the '20% off all Women's and Men's Pants' rule configuration page. At the top, the 'Scheduled Changes' section displays a calendar icon, the date 'May 27, 2016', the time '8:05 PM', and the status 'Start'. Below this, there are buttons for 'View/Edit' and 'Preview'. A 'Schedule New Update' button is also present. Below the 'Scheduled Changes' section, there are buttons for 'Back', 'Delete Rule', 'Reset', 'Save and Continue Edit', and a prominent 'Save' button. The 'Rule Information' section below contains three fields: 'Rule Name' (20% off all Women's and Men's Pants), 'Description' (20% off all Women's and Men's Pants), and 'Websites' (Main Website). A help icon is visible next to the 'Websites' field.

*Scheduled Changes*

**To edit the existing schedule:**

My Catalog Rule Belongs to My Catalog Rule My Catalog Rule

← Cancel Remove this update Preview Update **Save**

Schedule Update

• Edit Existing Update My Catalog Rule

Update Name • My Catalog Rule

Description

Start Date • May 24, 2017 7:14 AM

End Date

☐ Assign to Another Campaign

Rule Information

*Update Schedule*

**To assign to another campaign:**

My Catalog Rule Belongs to My Catalog Rule My Catalog Rule

← Cancel Remove this update Preview Update **Save**

Schedule Update ✓

☐ Edit Existing Update My Catalog Rule

• Assign to Another Campaign

Search by keyword

Selected Campaigns: Starting: Ending: 20 per page 1 of 1

Name	Start Time	End Time
Select My Catalog Rule	May 24, 2017 7:14 AM	

Rule Information

Rule Name • My Catalog Rule

*Assign to Another Campaign*

## Price Rule with Multiple SKUs

A single price rule can be applied to multiple SKUs, which makes it possible to create a variety of promotions based on a product, brand, or category.

### Step 1: Verify Storefront Properties of Attribute

Before you begin, make sure that the Storefront Properties of the SKU attribute are set to "Use in Promo Rules."

1. On the Admin sidebar, tap **Stores**. Then under **Attributes**, choose **Product**.
2. In the search filter at the top of the **Attribute** Column, enter "sku." Then, tap **Search**.
3. Click to open the attribute in edit mode.
4. In the panel on the left, choose **Storefront Properties**. Then, make sure that **Use for Promo Rule Conditions** is set to "Yes,"
5. If you changed the value of the property, tap **Save Attribute**.

### Step 2: Apply a Price Rule to Multiple SKUs

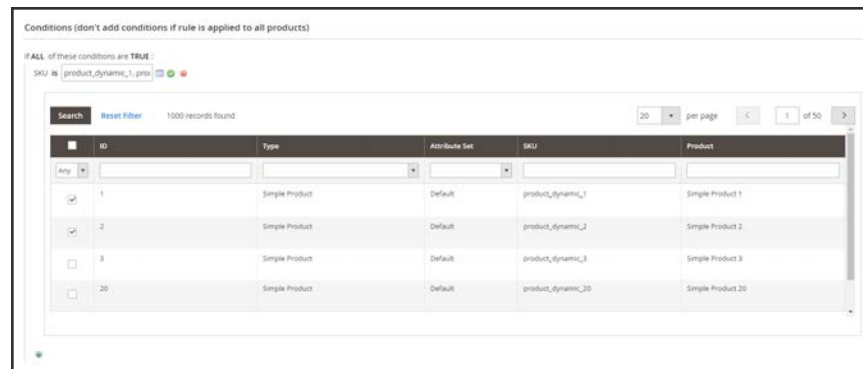
1. On the Admin sidebar, tap **Marketing**. Then under **Promotions**, choose **Cart Price Rules**.
2. Do one of the following:
  - Follow the instructions to create a **cart price rule**.
  - Open an existing cart price rule.
3. Expand ☹ the **Conditions** section, and do the following:
  - a. In the first line, set the first parameter to "ANY."

*If ANY of these conditions are TRUE*

- b. Tap **Add** (⊕) at the beginning of the next line. Then, in the list under **Product Attribute**, choose **SKU**.

*SKU is ...*

- c. To complete the condition, click the (...) “more” link. Then, tap the **Chooser** button for the list of available products.



*Choose Each SKU*

- d. In the list, mark the checkbox of each product that is to be included. Then, tap **Save and Apply** to add the SKUs to the condition.



*Multiple SKUs Added to Condition*

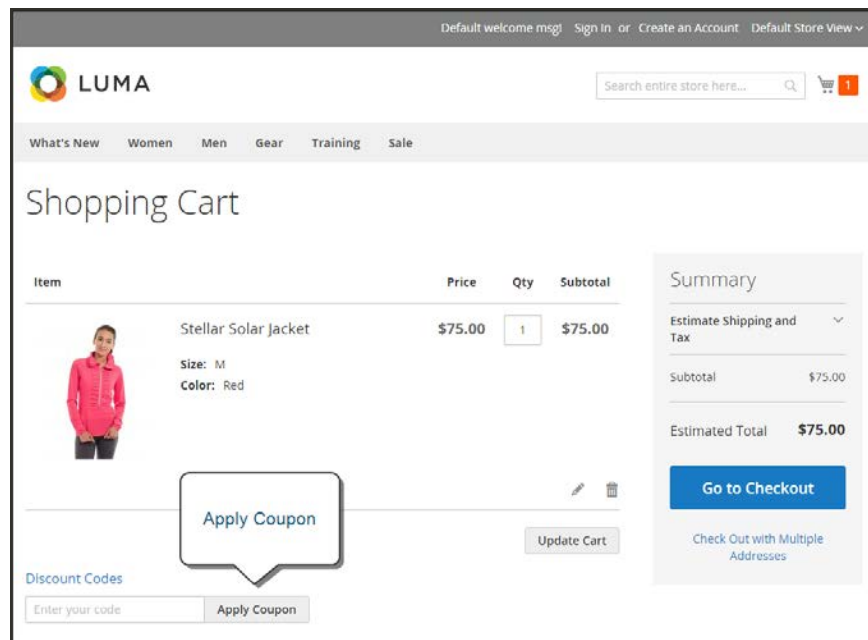
4. Complete the rule, including any **Actions** to be taken when the conditions are met.
5. When complete, tap **Save**.

When you create a new price rule, it might take an hour or so to become available. Make sure to allow enough time for it to get into the system. Then, test the rule to make sure that it works correctly. Unless otherwise specified, price rules are automatically processed with other system rules each night.

## CHAPTER 22:

# Cart Price Rules

Cart price rules apply discounts to items in the shopping cart, based on a set of conditions. The discount can be applied automatically as soon as the conditions are met, or when the customer enters a valid coupon code. When applied, the discount appears in the cart under the subtotal. A cart price rule can be used as needed for a season or promotion by changing its status and date range.



*Apply Coupon in Cart*

## Creating a Cart Price Rule

Complete the following steps to add a new rule, describe the conditions, and define the actions. Then, complete the labels, and test the rule.

### Process Overview:

Step 1: [Add a New Rule](#)

Step 2: [Describe the Conditions](#)

Step 3: [Define the Actions](#)

Step 4: [Complete the Labels](#)

Step 5: [Add Related Banners](#)

### Step 1: Add a New Rule

1. On the Admin sidebar, tap **Marketing**. Then under **Promotions**, choose **Cart Price Rules**.
2. Tap [Add New Rule](#). Then, do the following:

The screenshot displays the 'Cart Price Rules' management page in the Magento Admin. The left sidebar shows the 'Marketing' menu item selected. The main area features a table with the following columns: ID, Rule, Coupon Code, Start, End, Status, Web Site, and Priority. There are four rules listed:

ID	Rule	Coupon Code	Start	End	Status	Web Site	Priority
4	\$4 Luma water bottle (save 70%)	H20		—	Active	Main Website	0
1	Buy 3 tee shirts and get the 4th free			—	Active	Main Website	0
2	Spend \$50 or more + shipping is free!			—	Active	Main Website	0
3	20% OFF over \$200-plus purchase*			—	Active	Main Website	0

At the top right of the main area is an 'Add New Rule' button. Below the table, the footer shows 'Copyright © 2015 Magento Commerce Inc. All rights reserved.' and 'Magento ver. 2.0.0'.

*Cart Price Rules*



- a. Under Rule Information, complete the **Rule Name** and **Description**.

The screenshot shows the 'New Cart Price Rule' form in the Magento 2 admin interface. The form is titled 'New Cart Price Rule' and includes a sidebar with navigation links. The main form area is divided into sections: 'Currently Active', 'Rule Information', 'Conditions', 'Actions', and 'Labels'. The 'Rule Information' section contains fields for 'Rule Name', 'Description', 'Active' (toggle), 'Websites' (dropdown), 'Customer Groups' (dropdown), 'Coupon' (dropdown), 'Uses per Customer' (text), 'From' (date), 'To' (date), 'Priority' (text), and 'Public in RSS Feed' (toggle). The 'Conditions' section is currently empty. The 'Actions' and 'Labels' sections are also empty. The footer shows 'Copyright © 2016 Magento Commerce Inc. All rights reserved.' and 'Magento ver. 2.1.0'.

### General Information

- b. If you do not want the rule to go into effect immediately, set **Active** to “No.”
3. To establish the **scope** of the rule, do the following:
- Select the **Websites** where the promotion is to be available.
  - Select the **Customer Groups** to which the promotion applies.
    - If you want the promotion to be available only to registered customers, do not choose the “NOT LOGGED IN” option.
4. To associate a **coupon** with the price rule, set **Coupon** to “Specific Coupon.” Then, do the following:
- Enter a numeric **Coupon Code** that the customer must enter to receive the discount.
  - To set a limit on the number of times the coupon can be used, complete the following:

Uses per Coupon	Determines how many times the coupon code can be used. If there is no limit, leave the field blank.
Uses per Customer	Determines how many times the coupon code can be used by the same registered customer who belongs to any of the selected customer groups. The setting does not apply to guest shoppers who are members of the NOT LOGGED IN customer group, or to customers who shop without logging in to their accounts. If there is no limit, leave the field blank.

To learn more, see: [Coupon Codes](#).

Coupon \* Specific Coupon

Coupon Code \* aBC123

☐ Use Auto Generation  
If you select and save the rule you will be able to generate multiple coupon codes.

Uses per Coupon 1

Uses per Customer 1  
Usage limit enforced for logged in customers only.

From

To

*Coupon Settings*

5. Enter the number of **Uses per Customer** to limit the number of times the rule can be applied to a single, logged-in customer.
6. Enter a number to determine the **Priority** of this price rule in relation to the Action settings of other price rules which are active at the same time. (Number 1 has the highest priority.)
7. To apply the rule to published **RSS feeds**, set **Public In RSS Feed** to “Yes.”

## Step 2: Describe the Conditions


In this step, the conditions are described that must be met for an order to qualify for the promotion. The rule goes into action whenever the set of conditions is met.

*Conditions*

1. In the panel on the left, select **Conditions**. The first rule appears by default, and states:

If ALL of these conditions are TRUE:

The statement has two bold links which when tapped, display the selection of options for that part of the statement. You can create different conditions by changing the combination of these values. Do any of the following:

- Click the **ALL** link, and select “ALL” or “ANY.”
  - Click the **TRUE** link and select “TRUE” or “FALSE.”
  - Leave the condition unchanged to apply the rule to all products.
2. Click **Add** (  ) at the beginning of the next line. For this example, complete the next part of the condition as follows:
    - a. When prompted to **Choose the condition to add**, choose "Products Subselection."

*Products Subselection*

- b. When the next part of the condition appears, mouse over the line so you can see where each link with variable values is located.

*If ALL of these conditions are TRUE*

- c. Click the "more" (...) link, and enter ">100." This condition requires the total quantity of the cart to be greater than 100.

*Total Quantity Value*

3. Click **Add** (⊕) at the beginning of the next line. Then add a condition that is based on **Category**.

*Category*

- a. In the next part of the condition, click the "**more**" (...) link to display the input field. Then, open the **Chooser** (📁) to display the category tree.
- b. Mark the checkbox of the category that you want to use as a condition for the price rule. The condition can be based on any category that is a child of the store's **root category**.



*Choosing a Category for a Condition*

4. To add more conditions, click **Add** (  ) and define another condition.

You can repeat the process as many times as needed to describe the conditions that must be met for the price rule. Here are some examples:

### Example 1: Regional Price Rule

To create a regional price rule, use one of the following cart attributes:

- Shipping Postcode
- Shipping Region
- Shipping State/Province
- Shipping Country

### Example 2: Shopping Cart Totals

To base the condition on shopping cart totals, use one of the following cart attributes:

- Subtotal
- Total Items Quantity
- Total Weight

### Step 3: Define the Actions

The shopping cart price rule actions describe how prices are updated when the conditions are met.

1. Scroll down to **Actions**, and expand ☺ the section. Then, do the following:


*Cart Price Rule Actions*

- a. Set **Apply** to one of the following discount options:

Percent of product price discount	Discounts item by subtracting a percentage from the original price. The discount applies to each qualifying item in the cart. For example: Enter 10 in Discount Amount for an updated price that is 10% less than the original price.
Fixed amount discount	Discounts item by subtracting a fixed amount from original price. The discount applies to each qualifying item in the cart. For example: Enter 10 in Discount Amount for an updated price that is \$10 less than the original price.
Fixed amount discount for whole cart	Discounts the entire cart by subtracting a percentage from the cart total. For example: Enter 10 in Discount Amount to subtract 10% from the cart total.
Buy X get Y free	Defines a quantity that the customer must purchase to receive a quantity for free. (The Discount Amount is Y.)

- b. Enter the **Discount Amount** as a number, without symbols. For example, depending on the discount option selected, the number 10 might indicate a percentage, a fixed amount, or a quantity of items.
- c. For a "Buy X get Y Free" discount, enter the quantity in the **Discount Qty Step (Buy X)** field that the customer must purchase to receive the discount.
- d. In the **Maximum Qty Discount is Applied To** field, enter the maximum quantity of the same product that can qualify for the discount in the same purchase.
- e. Set **Apply to Shipping Amount** (☺) as follows:

Yes	Applies the discount amount to the subtotal and shopping amounts separately.
No	Applies the discount amount only to the subtotal.

- f.** To stop processing other rules after this rule is applied, set **Discard Subsequent Rules** (  ) to “Yes.” This safeguard prevents customers from receiving multiple discounts for the same product.

- g.** To determine if free shipping is applied to orders that meet the conditions, set **Free Shipping** to one of the following:

No	Free shipping is not available.
For matching items only	Free shipping is available only for items that match the conditions of the rule.
For shipment with matching items	Free shipping is available for any shipment that includes matching item(s).

- h.** In the **Add Rewards Points** field, enter the number of points the customer earns whenever the cart price rule is applied. (If reward points aren’t enabled, leave this field blank.)

- 2.** Define as many additional conditions as needed for the action.


- 3.** When complete, tap **Save and Continue Edit**.

### Step 4: Complete the Labels

The label appears in the totals section of the order to identify the discount. The label text is enclosed in parentheses, after the word, “Discount”. You can enter a default label for all store views, or enter a different label for each view.

Subtotal	\$112.00
Shipping & Handling	\$0.00
Discount (Special)	-\$15.00
Tax	\$8.00
<b>Grand Total</b>	<b>\$105.00</b>

*Discount Label in Totals Section of Order*

1. Scroll down to **Labels**, and expand  the section.
2. Enter the text that you want used as the **Default Rule Label for All Store Views**.

Labels 


Default Rule Label for All Store Views

*Default Label*

3. If your store has multiple views, or multiple websites with multiple views, enter the appropriate label text for each. For example, if each store view is in a different language, enter the translation of the label for each view.

Store View Specific Labels ?	
Main Website	
Main Website Store	
English	Special
French	Spécial
German	Besondere
Spanish	Especial

### Step 5: Add Related Banners (optional)

**Banners** that are associated with the rule appear in the storefront whenever the conditions are met.

1. Expand the **Related Banners** section.
2. Use the **search filters** to locate the banner(s) that you want to associate with the rule.
3. Mark the checkbox in the first column to associate the banner with the rule.

To learn more, see: [Using Banners in Price Rules](#).

### Step 6: Save and Test the Rule

1. When complete, tap **Save Rule**.
2. Test the rule to make sure that it works correctly.

When you create a new price rule, it might take an hour or so to become available. Make sure to allow enough time for it to get into the system. Then, test the rule to make sure that it works correctly. Unless otherwise specified, price rules are automatically processed with other system rules each night. As new rules are added, Magento recalculates the prices and the priorities accordingly.

### Field Descriptions

FIELD	DESCRIPTION
<b>RULE INFORMATION</b>	
Rule Name	(Required) The name of the rule is for internal reference.
Description	A description of the rule should include the purpose of the rule, and explain how it is used.



**Field Descriptions (cont.)**

FIELD	DESCRIPTION										
Active	(Required) Determines if the rule is currently active in the store. Options: Yes / No										
Websites	(Required) Identifies the websites where the rule can be used.										
Customer Groups	(Required) Identifies the customer groups to which the rule applies.										
Coupon	(Required) Indicates if a coupon is associated with the rule. Options: <table> <tr> <td>No Coupon</td><td>No coupon is associated with the rule.</td></tr> <tr> <td>Specific Coupon</td><td>A specific coupon is associated with the rule.               <table> <tr> <td>Coupon Code</td><td>When prompted, enter the Coupon Code that the customer must enter to take advantage of the promotion.</td></tr> <tr> <td>Use Auto Generation</td><td>Select the checkbox to automatically generate multiple coupon codes that can be used with the promotion.</td></tr> </table> </td></tr> <tr> <td>Auto</td><td>Displays the Coupons Information section to define the format of the coupon codes to be generated.</td></tr> </table>	No Coupon	No coupon is associated with the rule.	Specific Coupon	A specific coupon is associated with the rule. <table> <tr> <td>Coupon Code</td><td>When prompted, enter the Coupon Code that the customer must enter to take advantage of the promotion.</td></tr> <tr> <td>Use Auto Generation</td><td>Select the checkbox to automatically generate multiple coupon codes that can be used with the promotion.</td></tr> </table>	Coupon Code	When prompted, enter the Coupon Code that the customer must enter to take advantage of the promotion.	Use Auto Generation	Select the checkbox to automatically generate multiple coupon codes that can be used with the promotion.	Auto	Displays the Coupons Information section to define the format of the coupon codes to be generated.
No Coupon	No coupon is associated with the rule.										
Specific Coupon	A specific coupon is associated with the rule. <table> <tr> <td>Coupon Code</td><td>When prompted, enter the Coupon Code that the customer must enter to take advantage of the promotion.</td></tr> <tr> <td>Use Auto Generation</td><td>Select the checkbox to automatically generate multiple coupon codes that can be used with the promotion.</td></tr> </table>	Coupon Code	When prompted, enter the Coupon Code that the customer must enter to take advantage of the promotion.	Use Auto Generation	Select the checkbox to automatically generate multiple coupon codes that can be used with the promotion.						
Coupon Code	When prompted, enter the Coupon Code that the customer must enter to take advantage of the promotion.										
Use Auto Generation	Select the checkbox to automatically generate multiple coupon codes that can be used with the promotion.										
Auto	Displays the Coupons Information section to define the format of the coupon codes to be generated.										
Uses per Customer	Determines the number of times the coupon code can be used by a single, logged-in customer.										
Uses per Customer	Determines how many times the coupon code can be used by the same registered customer who belongs to any selected customer group. Does not apply to guest shoppers who are members of the NOT LOGGED IN customer group, or to customers who shop without logging in to their accounts. For no limit, leave blank.										
Priority	A number that indicates the priority of this rule in relation to others. The highest priority is number 1.										
Public in RSS Feed	Determines if the promotion is included in your store's public RSS feed. Options: Yes / No.										

**CONDITIONS**

**Field Descriptions (cont.)**

FIELD	DESCRIPTION								
	Specifies the conditions that must be met before the cart price rule goes into action. If left blank, the rule applies to all products in the cart.								
<b>ACTIONS</b>									
Apply	<p>Determines the type of calculation that is applied to the purchase. Options:</p> <table> <tr> <td>Percent of product price discount</td><td> <p>Discounts item by subtracting a percentage from the original price.</p> <p>For example: Enter 10 in Discount Amount for an updated price that is 10% less than the original price.</p> </td></tr> <tr> <td>Fixed amount discount</td><td> <p>Discounts item by subtracting a fixed amount from original price.</p> <p>For example: Enter 10 in Discount Amount for an updated price that is \$10 less than the original price.</p> </td></tr> <tr> <td>Fixed amount discount for whole cart</td><td> <p>Discounts the entire cart by subtracting a fixed amount from the cart total.</p> <p>For example: Enter 10 in Discount Amount to subtract \$10 from the cart total.</p> </td></tr> <tr> <td>Buy X Get Y Free (discount amount is Y)</td><td> <p>Defines a quantity that the customer must purchase to receive a quantity for free. (The Discount Amount is Y.)</p> </td></tr> </table>	Percent of product price discount	<p>Discounts item by subtracting a percentage from the original price.</p> <p>For example: Enter 10 in Discount Amount for an updated price that is 10% less than the original price.</p>	Fixed amount discount	<p>Discounts item by subtracting a fixed amount from original price.</p> <p>For example: Enter 10 in Discount Amount for an updated price that is \$10 less than the original price.</p>	Fixed amount discount for whole cart	<p>Discounts the entire cart by subtracting a fixed amount from the cart total.</p> <p>For example: Enter 10 in Discount Amount to subtract \$10 from the cart total.</p>	Buy X Get Y Free (discount amount is Y)	<p>Defines a quantity that the customer must purchase to receive a quantity for free. (The Discount Amount is Y.)</p>
Percent of product price discount	<p>Discounts item by subtracting a percentage from the original price.</p> <p>For example: Enter 10 in Discount Amount for an updated price that is 10% less than the original price.</p>								
Fixed amount discount	<p>Discounts item by subtracting a fixed amount from original price.</p> <p>For example: Enter 10 in Discount Amount for an updated price that is \$10 less than the original price.</p>								
Fixed amount discount for whole cart	<p>Discounts the entire cart by subtracting a fixed amount from the cart total.</p> <p>For example: Enter 10 in Discount Amount to subtract \$10 from the cart total.</p>								
Buy X Get Y Free (discount amount is Y)	<p>Defines a quantity that the customer must purchase to receive a quantity for free. (The Discount Amount is Y.)</p>								
Discount Amount	(Required) The amount of discount that is offered.								
Maximum Qty Discount is Applied To	Sets the maximum number of products that the discount can be applied to in the same purchase.								
Discount Qty Step (Buy X)	Sets the number of products represented by "X" in a "Buy X Get Y Free" promotion.								
Apply to Shipping Amount	Determines if the discount can be applied to the cost of shipping. Options: Yes / No.								
Discard Subsequent Rules	Determines if additional rules can be applied to this purchase. To prevent multiple discounts from being applied to the same purchase, select "Yes." Options: Yes / No								

**Field Descriptions (cont.)**

FIELD	DESCRIPTION
Free Shipping	Determines if free shipping is included in the promotion, and if so, for which items. Options:  No                      Free shipping is not available when a coupon that is based on the rule is used.  For matching items only                      Free shipping is available only for specific items in the cart that match the rule.  For shipment with matching items                      Free shipping is available for the entire cart when a coupon that is based on the rule is used.
Add Reward Points	Specifies the number of <b>reward points</b> that are earned by the customer whenever the price rule is applied.
<b>LABELS</b>	
Default Rule Label for All Store Views	A default label that identifies the discount and can be used for all store views.
Store View Specific Labels	If applicable, specifies a different label to identify the discount for each store view.
<b>RELATED BANNERS</b>	
	Identifies any banner(s) that are associated with the rule.

## Coupon Codes

Coupon codes are used with **cart price rules** to apply a discount when a set of conditions is met. For example, a coupon code can be created for a specific customer group, or for anyone who makes a purchase over a certain amount. To apply the coupon to a purchase, the customer can enter the coupon code in the cart, or possibly at the cash register of your “brick and mortar” store. Here are a few ways that you can use coupons in your store:

- Email coupons to customers
- Produce printed coupons
- Create in-store coupons for mobile users

Coupon codes can be sent by email, or included in newsletters, catalogs, and advertisements. The list of coupon codes can be exported and sent to a commercial printer. You can also create in-store coupons with a quick response code that shoppers can scan with their smart phones. The QR code can link to a page on your site with more information about the promotion.

### Method 1: Create a Specific Coupon

1. Follow the instructions to create a **cart price rule**.
2. On the General Information page, set **Coupon** to “Specific Coupon.”
  - a. Enter a **Coupon Code** to be used with the promotion.

The format of the code as numeric, alphanumeric or alphabetical is determined by the **configuration**.

- b. To limit the number of times the coupon can be used, complete the following:
  - Uses per Coupon
  - Uses per Customer

For unlimited use, leave these fields blank.

*Coupon Information*

- c. To make the coupon valid for a limited period of time, complete the **From** and **To** dates. To select the date, tap the **Calendar** (📅) button next to each field. If you leave the date range empty, the rule will never expire.


3. Complete the **cart price rule** as needed.

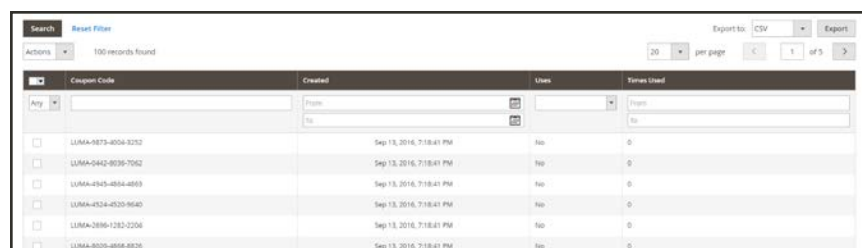
## Method 2: Generate a Batch of Coupons

1. Follow the instructions to create a **cart price rule**.
2. Under **Coupon Code**, mark the **Use Auto Generation** checkbox.
3. To limit the number of times each customer can use the coupon, enter the number of **Uses per Customer**.



### Generate Auto-numbered Coupons

4. Scroll down and expand  the **Manage Coupon Codes** section. Then, do the following:
  - a. In the **Coupons Qty** field, enter the number of coupons that you want to generate.
  - b. Enter the **Code Length**, not including the prefix, suffix, or separators.
  - c. Set the **Code Format** to one of the following:
    - Alphanumeric
    - Alphabetical
    - Numeric
  - d. (Optional) Enter a **Code Prefix** to be added to the beginning of the code.
  - e. (Optional) Enter a **Code Suffix** to be added to the end of the code.
  - f. (Optional) In the **Dash Every X Characters** field, enter the number of characters between each dash. For example, if the code is twelve characters long, and there is a dash every four characters, it will look like this: xxxx-xxxx-xxxx. Dashes make codes easier to read and enter.
5. When complete, tap **Generate**. The list of generated codes appears below.



Coupon Code	Created	Used	Times Used
UAAA-8873-4004-3252	Sep 13, 2016, 7:18:41 PM	No	0
UAAA-0442-9036-7062	Sep 13, 2016, 7:18:41 PM	No	0
UAAA-4543-4804-4803	Sep 13, 2016, 7:18:41 PM	No	0
UAAA-4324-4322-9040	Sep 13, 2016, 7:18:41 PM	No	0
UAAA-2886-1282-2206	Sep 13, 2016, 7:18:41 PM	No	0
UAAA-8029-4868-4826	Sep 13, 2016, 7:18:41 PM	No	0

### Generated Codes

## Configuring Coupon Codes

The length and format of automatically generated coupon codes is controlled by the configuration. The characters can be set to all numbers, all letters, or a combination. You can insert a dash at set intervals to make it easy to read, and add a .prefix and suffix to associate the code with a specific campaign or initiative.

The screenshot shows a configuration panel titled "Auto Generated Specific Coupon Codes". It contains the following fields and options:

- Code Length**: A text input field with the value "12". Below it, in smaller text, is "Excluding prefix, suffix and separators." To the right is a checked checkbox labeled "Use system value".
- Code Format**: A dropdown menu currently showing "Alphanumeric". To the right is a checked checkbox labeled "Use system value".
- Code Prefix**: An empty text input field.
- Code Suffix**: An empty text input field.
- Dash Every X Characters**: An empty text input field. Below it, in smaller text, is "If empty no separation."

*Auto Generated Specific Coupon Codes*

### To format coupon codes:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Customers**, choose **Promotions**.
3. In the **Auto Generated Specific Coupon Codes** section, do the following:
  - a. Enter the **Code Length**, including prefix, suffix, and separators.
  - b. Set the **Code Format** to one of the following:
    - Alphanumeric
    - Alphabetical
    - Numeric
  - c. To add a **Code Prefix**, enter the value that you want to appear at the beginning of all coupon codes.
  - d. To add a **Code Suffix**, enter the value that you want to appear at the end of all coupon codes.
  - e. To insert a **Dash Every X Characters**, enter the number of characters between each dash. Coupon codes with different dash patterns are considered to be different codes, even if the numbers are the same.
4. When complete, tap **Save Config**.

## Coupons Report

The Coupons Report can be filtered for a specific store view, time period, order status, and price rule.

*Coupon Report Filters*

### To run the report:

1. On the Admin sidebar, tap **Reports**. Then under **Sales** choose **Coupons**.
2. If you have multiple store views, set **Store View** in the upper-left corner to establish the scope of the report.
3. To refresh the sales **statistics** for the day, click the message at the top of the workspace.
4. To filter the data, do the following:
  - a. Set **Date Used** to one of the following:

- Order Created
- Order Updated

The Order Updated report is created in real-time, and does not require a refresh.

- b. To define the period of time covered by the report, set **Period** to one of the following:
- Day
  - Month
  - Year

- c. Enter the **From** and **To** dates in M/D/YY format to define the date range of the report.
  - d. To print a report for a specific **order status**, set **Order Status** to “Specified,” Then, choose the order status from the list.
  - e. Set omit rows without data from the report, set **Empty Rows** to “No.”
  - f. Do one of the following:
    - To include all coupon activity from all price rules, set **Cart Price Rule** to “Any.”
    - To include only activity that is related to a specific price rule, set **Cart Price Rule** to “Specified,” Then, select the specific cart price rule in the list.
5. When ready to run the report, tap **Show Report**. The report appears at the bottom of the page.



## Scheduled Changes

Cart price rules can be applied on schedule, and grouped with other content changes. You can create a new campaign based on scheduled changes to a price rule, or apply the changes to an existing campaign.

If a campaign that includes a price rule is initially created without an end date, the campaign cannot later be edited to include an end date. It is recommended that you either add an end date when you create the campaign, or create a duplicate version of the existing campaign and add the end date to the duplicate as needed.

If there are multiple price rules running in the same campaign, the Priority setting of the price rule determines which rule takes precedence. To learn more, see: [Content Staging](#).

The screenshot displays the Magento Admin interface for editing a cart price rule. The left sidebar contains navigation links for Dashboard, Sales, Products, Customers, Marketing, Content, Reports, Stores, System, and Third Parties & Extensions. The main content area is titled 'Spend \$50 or more - shipping is free!' and includes a 'Scheduled Changes' section with a 'Schedule New Update' button. Below this, there are buttons for 'Back', 'Delete', 'Reset', 'Save and Continue Edit', and 'Save'. The 'Currently Active' section shows 'Rule Information' with the following details: Rule Name (Spend \$50 or more - shipping is free!), Description (Free shipping on any purchase over \$50), Active status (Yes, indicated by a green toggle), and Websites (Main Website). A help icon is visible next to the Websites field.

*Scheduled Changes*

## Free Shipping Promotion

Free shipping can be offered as a promotion, either with, or without a **coupon**. A free shipping coupon, or voucher, can also be applied to customer pick-up orders, so the order can be invoiced and “shipped” to complete the **workflow**.

Some shipping carrier configurations give you the ability of offer free shipping based on a minimum order. To expand upon this basic capability, you can use shopping cart price rules to create complex conditions based on multiple product attributes, cart contents, and customer groups.

### Process Overview:

Step 1: **Enable Free Shipping**

Step 2: **Create a Cart Price Rule**

Step 3: **Complete the Labels**

Step 4: **Save and Test the Rule**

### Step 1: **Enable Free Shipping**

1. Enable **Free Shipping** in your store’s configuration.
2. Complete the free shipping settings for any **carrier service** that you want to use for free shipping.

## Step 2: Create a Cart Price Rule

1. On the Admin sidebar, tap **Marketing**. Then under **Promotions**, choose **Cart Price Rules**.
2. Follow the steps below to set up the type of free shipping promotion that you want to offer.

### Example 1: Free Shipping for Any Order



1. Complete the **Rule Information** as follows:
  - a. Enter a **Rule Name** for internal reference.
  - b. Enter a brief **Description** to describe the rule.
  - c. Set **Active** to “Yes.”
  - d. In the **Websites** box, select each site where the free shipping coupon is to be available.
  - e. Select the **Customer Groups** to which the rule applies.
  - f. Set **Coupon** to one of the following:
    - To offer a free shipping promotion without a coupon, accept the default, “No Coupon” setting.
    - To use a coupon with the price rule, select “Specific Coupon.” If necessary, complete the instructions to set up a **coupon**.
2. Scroll down and expand ☑ the **Actions** section. Then, do the following:
  - a. Set **Apply** to “Percent of product price discount.”
  - b. Set **Apply to Shipping Amount** to “Yes.”
  - c. Set **Free Shipping** to “For shipment with matching items.”

The screenshot shows the 'Actions' section of a Magento 2 admin interface. It contains several configuration options for a price rule action:

- Apply:** A dropdown menu set to 'Percent of product price discount'.
- Discount Amount:** A text input field with the value '0'.
- Maximum Qty Discount is Applied To:** A text input field with the value '0'.
- Discount Qty Step (Buy X):** A text input field.
- Apply to Shipping Amount:** A toggle switch set to 'Yes'. Below it, a note reads: 'Discount amount is applied to subtotal and shipping amount separately'.
- Discard subsequent rules:** A toggle switch set to 'No'.
- Free Shipping:** A dropdown menu set to 'For shipment with matching items'.

*Price Rule Action*


## Example 2: Free Shipping for Orders Over \$Amount


1. Complete the **General Information** settings as described in the previous example.
2. Scroll down and expand  the **Conditions** section.
3. Tap **Add** (  ) to insert a condition. Then, do the following:
  - a. In the list under **Cart Attribute**, choose **Subtotal**.
  - b. Click the **is** link, and choose “equals or greater than.”
  - c. Click the (...) “more” link, and enter a threshold value for the Subtotal, such as 100, to complete the condition.

Apply the rule only if the following conditions are met (leave blank for all products).


---


If **ALL** of these conditions are **TRUE** :


Subtotal **equals or greater than** 100 




### Condition

4. If necessary, expand  the **Actions** section. Then do the following:
  - a. Set **Apply** to “Percent of product price discount.”
  - b. Set **Apply to Shipping Amount** to “Yes.”
  - c. Set **Free Shipping** to “For shipment with matching items.”


Actions 


Apply **Percent of product price discount** 


Discount Amount  0

Maximum Qty Discount is Applied To 0

Discount Qty Step (Buy X)

Apply to Shipping Amount  Yes  
Discount amount is applied to subtotal and shipping amount separately

Discard subsequent rules  No

Free Shipping **For shipment with matching items** 

### Actions

**Step 3: Complete the Labels**

Complete **Step 4** of the cart price rule instructions to enter any labels that appear during checkout.

**Step 4: Save and Test the Rule**

1. When complete, tap **Save Rule**.
2. Test the rule to make sure that it works correctly.

When you create a new price rule, it might take an hour or so to become available. Make sure to allow enough time for it to get into the system. Then, test the rule to make sure that it works correctly. Unless otherwise specified, price rules are automatically processed with other system rules each night.

## Buy X Get Y Free

This example shows how to set up a **cart price rule** for a “Buy X, Get Y Free” promotion. The format of the discount is as follows:

Buy X quantity of product, get Y quantity for free.

### Process Overview:

Step 1: **Create a Cart Price Rule**

Step 2: **Define the Conditions**

Step 3: **Define the Actions**

Step 4: **Complete the Label**

Step 5: **Save and Test the Rule**


### Step 1: Create a Cart Price Rule

Complete **Step 1** of the cart price rule instructions to complete the rule information.

### Step 2: Define the Conditions

Complete **Step 2** of the cart instructions to define the conditions for the price rule. The conditions can be triggered by purchasing a specific product, making a purchase of a certain amount, or any other scenario.

### Step 3: Define the Actions

1. Expand  the **Actions** section, and do the following:
  - a. Set **Apply** to “Buy X get Y free (discount amount is Y).”
  - b. Set **Discount Amount** to 1. This is the quantity the customer will receive for free.
  - c. To limit the number of discounts that can be applied when the condition is met, enter the number in the **Maximum Qty Discount is Applied To** field. For example, enter “1” to discount only one item.
  - d. In the **Discount Qty Step (Buy X)** field, enter the quantity that the customer must purchase to qualify for the discount. In this example, the customer must purchase two.
  - e. To prevent other discounts from being applied to the purchase, set **Discard subsequent rules** to “Yes.”

The screenshot shows the 'Actions' configuration window for a 'Buy X Get Y Free' rule. The settings are as follows:

- Apply:** Buy X get Y free (discount amount is Y)
- Discount Amount:** 1
- Maximum Qty Discount is Applied To:** 1
- Discount Qty Step (Buy X):** 2
- Apply to Shipping Amount:** No (Discount amount is applied to subtotal only)
- Discard subsequent rules:** Yes
- Free Shipping:** -- Please Select --

*Buy X Get Y Free*

2. Tap **Save and Continue Edit**. Then, complete the rest of the rule as needed.

#### Step 4: Complete the Label

Complete **Step 4** of the cart price rule instructions to enter the label that appears during checkout.

#### Step 5: Save and Test the Rule

1. When complete, tap **Save Rule**.
2. Test the rule to make sure that it works correctly.

When you create a new price rule, it might take an hour or so to become available. Make sure to allow enough time for it to get into the system. Then, test the rule to make sure that it works correctly. Unless otherwise specified, price rules are automatically processed with other system rules each night.

## Discount with Minimum Purchase

Cart price rules can be used to offer a percentage discount based on a minimum purchase. In the following example, a 25% discount is applied to all purchases over \$200.00 in a specific category. The format of the discount is as follows:

X% off all Y (category) over \$Z dollars

### Process Overview:

Step 1: **Create a Shopping Cart Rule**

Step 2: **Define the Conditions**

Step 3: **Define the Actions**

Step 4: **Apply the Labels**

Step 5: **Save and Test the Rule**

### Step 1: Create a Shopping Cart Rule

Follow the basic [instructions](#) to create a cart rule.

### Step 2: Define the Conditions

1. Scroll down and expand ☑ the **Conditions** section.
2. Tap **Add** (⊕), and choose **Product Attribute Combination**.



*Product Attribute Combination*


3. Tap **Add** (⊕) at the beginning of the next line. Then in the list under **Product Attribute**, choose **Category**.



*Category*

- a. Click the (...) “more” link to display additional options.

*Category IS*

- b. Tap the **Chooser** (  ) button to see the available categories. In the category tree, mark the checkbox of each category that you want to include. Then, press **Enter** to add the categories to the condition.

*Category IS*

4. Tap **Add** (  ) at the beginning of the next line, and do the following:

- a. In the list under **Cart Item Attribute**, choose **Price in cart**.

*Category IS*

- a. Click the **is** link, and choose “equals or greater than.”
- b. Click the (...) “more” link and enter the amount that the Price in Cart must be to meet the condition. For example, enter 200.

*Enter the Price to Complete the Condition*

5. Tap **Save and Continue Edit**.

### Step 3: Define the Actions

1. Expand  the **Actions** section, and do the following:

*Actions*

- a. Set **Apply** to “Percent of product price discount.”
  - b. Enter the **Discount Amount**. For example, enter 25 for a twenty-five percent discount.
  - c. To prevent additional promotions from being applied to the purchase, set **Discard subsequent rules** to “Yes.”
2. Tap **Save and Continue Edit**. Then, complete the rule as needed.

**Step 4: Complete the Labels**

Complete **Step 4** of the cart price rule instructions to enter any labels that appear during checkout.

**Step 5: Save and Test the Rule**

1. When complete, tap **Save Rule**.
2. Test the rule to make sure that it works correctly.

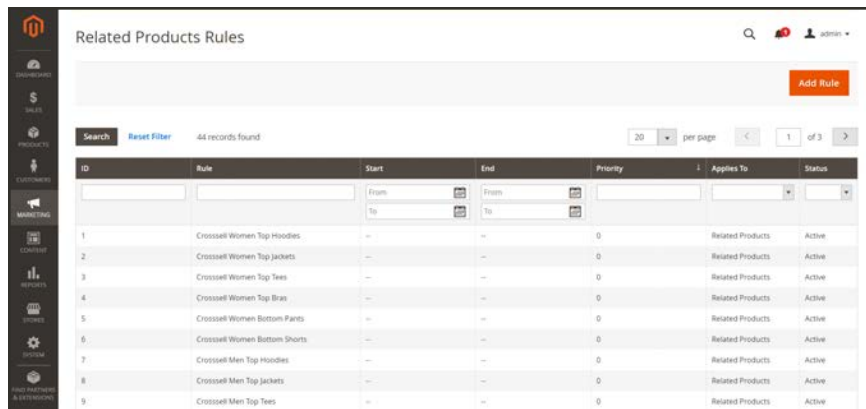
When you create a new price rule, it might take an hour or so to become available. Make sure to allow enough time for it to get into the system. Then, test the rule to make sure that it works correctly. Unless otherwise specified, price rules are automatically processed with other system rules each night.



## CHAPTER 23:

# Related Product Rules

Related product rules give you the ability to target the selection of products that are presented to customers as related products, up-sells, and cross-sells. Each product rule can be associated with a customer segment to produce a dynamic display of targeted merchandising.



ID	Rule	Start	End	Priority	Applies To	Status
1	Crosssell Women Top Hoodies	--	--	0	Related Products	Active
2	Crosssell Women Top Jackets	--	--	0	Related Products	Active
3	Crosssell Women Top Tees	--	--	0	Related Products	Active
4	Crosssell Women Top Bras	--	--	0	Related Products	Active
5	Crosssell Women Bottom Pants	--	--	0	Related Products	Active
6	Crosssell Women Bottom Shorts	--	--	0	Related Products	Active
7	Crosssell Men Top Hoodies	--	--	0	Related Products	Active
8	Crosssell Men Top Jackets	--	--	0	Related Products	Active
9	Crosssell Men Top Tees	--	--	0	Related Products	Active

*Related Products Rules*

## Creating a Related Product Rule

The process of creating a related product rule is similar to setting up a price rule. First, you define the conditions to match, and then choose the products that you want to display. At any given time there might be a number of active rules that can be triggered to display related products, up-sells, and cross-sells. The priority of each rule determines the order in which the block of products appears on the page.

For an attribute to be used in a targeted rule, the **Use for Promo Rule Conditions** property must be set to “Yes.”

### To create a related product rule:

1. On the Admin sidebar, tap **Marketing**. Then under **Promotions**, choose **Related Product Rules**.
2. In the upper-right corner, tap **Add Rule**.

*Rule Information*

3. Complete the **Rule Information** as follows:
  - a. Enter a **Rule Name** to identify the rule when working in the Admin.
  - b. In the **Priority** field, enter a number that determine the order that the results appear on the page, when results from other rules target the same location. Number 1 is top priority.
  - c. To enable the rule, set **Status** to “Active.”
  - d. Set **Apply To** to one of the following:

- Related Products
  - Up-sells
  - Cross-sells
- e. If the rule is to be active for a specific range of time, enter the **From** and **To** dates.
  - f. In the **Result Limit** field, enter the number of records to appear in the results list. The maximum number is 20.
  - g. If the rule applies to a specific **customer segment**, set **Customer Segments** to “Specified.” Then, choose the customer segment from the list.
4. In the panel on the left, choose **Products to Match**. Then, build the condition as you would for a **catalog price rule**.

Product Match Conditions (leave blank for matching all products)

If ALL of these conditions are TRUE :

..... +

*Products to Match*

5. In the panel on the left, choose **Products to Display**. Then, build the results condition as you would for a **catalog price rule**.

Product Result Conditions (leave blank for matching all products)

If ALL of these conditions are TRUE :

Product Activity contains Matched Product Activity

Product Gender contains Constant Value Men

..... +

*Products to Display*

6. Complete the condition to describe the products that you want to include in the results.
7. When complete, tap **Save**.

## Field Descriptions

FIELD	DESCRIPTION
Rule Name	A name that identifies the rule for internal use.
Priority	<p>Determines the sequence in which the results of the rule appear when displayed with other sets of results that target the same place on the page. The value can be set to any whole number, with the highest priority of 1.</p> <p>For example, if there are multiple up-sell rules that apply, the one with the highest priority appears before the others. The sort order of the products within each set of results is random.</p> <p>Any up-sell, cross-sell, and related products that were manually configured always appear on the page before any rule-based product promotions.</p>
Status	Controls the active status of the rule. Options: Active / Inactive
Apply To	<p>Identifies the type of product relationship that is associated with the rule. Options include:</p> <p><b>Related Products</b></p> <p><b>Up-sells</b></p> <p><b>Cross-sells</b></p>
From Date	If the rule is active for a range of time, determines the first date the rule is active.
To Date	If the rule is active for a range of time, determines the last date the rule is active.
Result Limit	Determines the number of products that appear in the results at one time. The maximum number is 20. If more matching results are found, the products rotate through the block each time the page is refreshed.
<b>Customer Segments</b>	Identifies the customer segments to which the rule applies. Options: All / Specified



## Related Product Rule Priority

At any given time, there might be a number of active rules that can be triggered to display related products, up-sells, and cross-sells. The priority of each rule determines the order in which the products appear on the page. The value can be set to any whole number, with one having the highest priority.

The number of product IDs that can be included in a product relations rule is determined by the Result Limit value, which has a maximum of twenty. The Result Limit value, combined with the configurable maximum for the specific rule-based product promotion becomes the “real limit,” and determines the actual number of matching products that can appear in the list.

$$[\text{Result Limit}] + [\text{Configurable Maximum}] = [\text{Real Limit}]$$

For example, suppose you have three rules, with a priority of one, two, and three.

- There are two matching products returned for Rule 1, six matching products for Rule 2, and twenty matching products for Rule 3.
- In the configuration, the Maximum Number of Products for Related Products List is set to six.

RULES	PRIORITY	MATCHING PRODUCTS
Rule 1	1	2
Rule 2	2	6
Rule 3	3	20


If the first rule returns more matching products than allowed by the “configurable maximum limit,” but less than the “real limit,” the matching products from the other existing rules are used—in order of priority—until the “real limit” is reached.

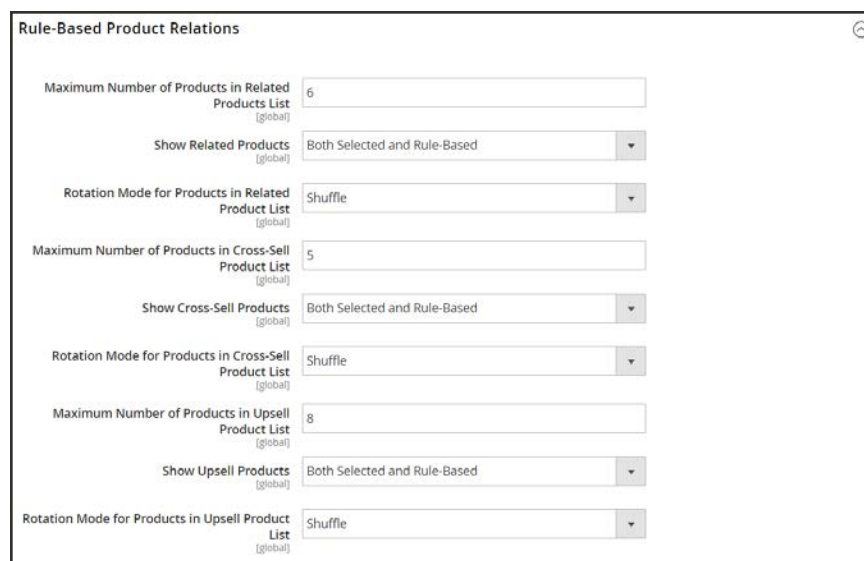
By priority, the matching products returned from Rule 1 can be used first to fill all twenty-six available slots. Because Rule 1 returned only two matching products, there is still room for twenty-four more. Rule 2 has the next highest priority, and returns six more matching products. There are now eighteen available slots to be filled. Rule 3 has the next level of priority, with enough matching products to fill the remaining eighteen slots. When all available slots are filled, and depending on the rotation mode that is set, the list might be shuffled, and then reduced to the “configurable maximum limit.” In this case, the remaining six products appear in the store.

## Configuring Related Products Rules

The behavior and display of product relationship rules is determined by the configuration settings. The settings determine how many products that match the rule can be displayed, and the order in which they appear.

### To configure rule-based product relations:

1. On the Admin sidebar, tap **Stores**. Then under Settings, choose **Configuration**.
2. In the panel on the left under **Catalog**, tap **Catalog**.
3. Expand  the **Rules-Based Product Relations** section. Then, do the following:



The screenshot shows the 'Rule-Based Product Relations' configuration panel. It contains several settings for related, cross-sell, and upsell products. Each setting has a text input field and a dropdown menu. The settings are:

- Maximum Number of Products in Related Products List** (global): 6
- Show Related Products** (global): Both Selected and Rule-Based
- Rotation Mode for Products in Related Product List** (global): Shuffle
- Maximum Number of Products in Cross-Sell Product List** (global): 5
- Show Cross-Sell Products** (global): Both Selected and Rule-Based
- Rotation Mode for Products in Cross-Sell Product List** (global): Shuffle
- Maximum Number of Products in Upsell Product List** (global): 8
- Show Upsell Products** (global): Both Selected and Rule-Based
- Rotation Mode for Products in Upsell Product List** (global): Shuffle

### *Rule-Based Product Relations*

- a. Enter the **Maximum Number of Products in the Related Products List**.
    - b. Set **Show Related Products** to one of the following:
      - Both Selected and Rule Based
      - Selected Only
      - Rule-Based Only
    - c. Set **Rotation Mode for Products in Related Product List** to one of the following:
      - Do Not Rotate
      - Shuffle
  4. To complete the cross-sell product settings, do the following:
    - a. Enter the **Maximum Number of Products in the Cross-Sell Product List**.
    - b. Set **Show Cross-Sell Products** to one of the following:
      - Both Selected and Rule Based
      - Selected Only
      - Rule-Based Only
    - c. Set **Rotation Mode for Products in Cross-Sell Product List** to one of the following:
      - Do Not Rotate
      - Shuffle
  5. To complete the up-sell product settings, do the following:
    - a. Enter the **Maximum Number of Products in the Upsell Product List**.
    - b. Set **Show Upsell Products** to one of the following:
      - Both Selected and Rule Based
      - Selected Only
      - Rule-Based Only
    - c. Set **Rotation Mode for Products in Upsell Product List** to one of the following:
      - Do Not Rotate
      - Shuffle
  6. When complete, tap **Save Config.**

# M

## erchandising

**Merchandising** is a term used in retail to describe the art and science of floor plan development and the presentation of products. In your Magento Commerce store, you might think of the category-based navigation as the floor plan of the store, and the dynamic presentation of products as the conditions that you can apply to the listing of products in the store.

## Contents

### Visual Merchandiser

- Creating Category Rules

- Configuring Visual Merchandiser

### Gift Registries

- Gift Registry Workflow

- Gift Registry Sections

- Configuring Gift Registries

- Setting up a Gift Registry

- Gift Registry Search

### Rewards & Loyalty

- Reward Point Configuration

- Reward Exchange Rates

- Using Reward Points in Price Rules

### Private Sales & Events

- Event Components

- Event Ticker

- Configuring Events

- Creating Events

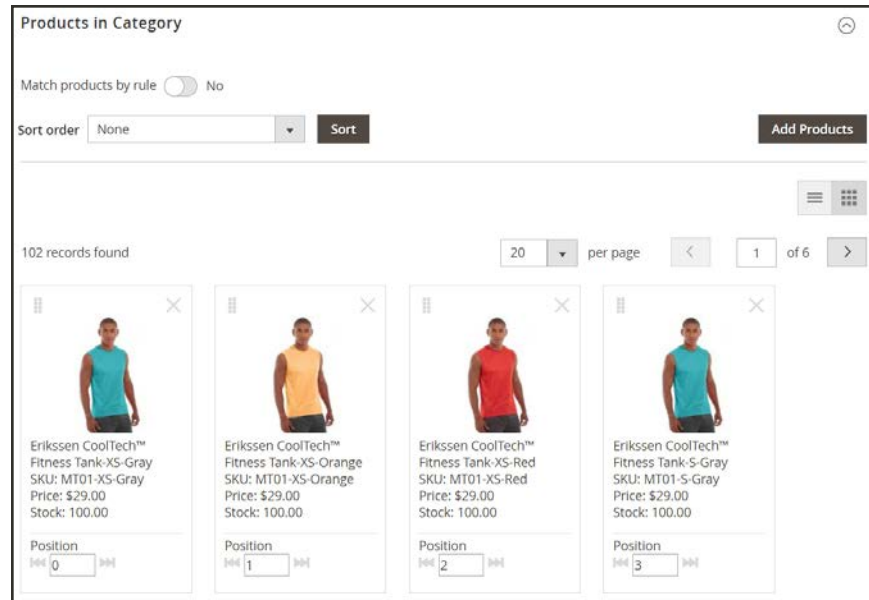
- Updating Events

- Invitations

## CHAPTER 24:



# Visual Merchandiser

**Visual Merchandiser** is a set of advanced tools that allows you to position products, and apply conditions that determine which products appear in the category listing. The result can be a dynamic selection of products that adjusts to changes in the catalog. You have the option to work in “visual mode,” which shows each product as a tile on a grid, or to work from a list of products in the category. The same tools are available in each mode, and you can use the buttons in the upper-right corner to toggle between each type of display.



*Category Products Viewed as Tiles*


### To access Visual Merchandiser:

1. On the Admin sidebar, tap **Products**. Then under **Inventory**, choose **Categories**.
2. Drill down through the category tree, and click the category that you want to edit.
3. Scroll down, and expand  the **Products in Category** section.
4. Tap the **View as Tiles** () button to display the products as a grid.
5. When complete, tap **Save Category**.


### To change the position of a product:

1. Use the **Sort Order** and paginate tools to view the product that you want to move.

#### Method 1: Drag and Drop

Grab the **Drag** () icon in the upper-right corner of the product tile, and drop the product into a position. The number of each product adjusts to reflect the new position.









#### Method 2: Set Position Value

In the **Position** field () on the product tile, enter the number where you want the product to appear. Enter the number zero (0) to place the product at the top of the list.

2. When complete, tap **Save Category**.

In a clean installation, Magento reserves the category ID 2 for the root catalog of the default store. Visual Merchandiser uses only categories with an ID number of 3 or greater.

## Workspace Controls

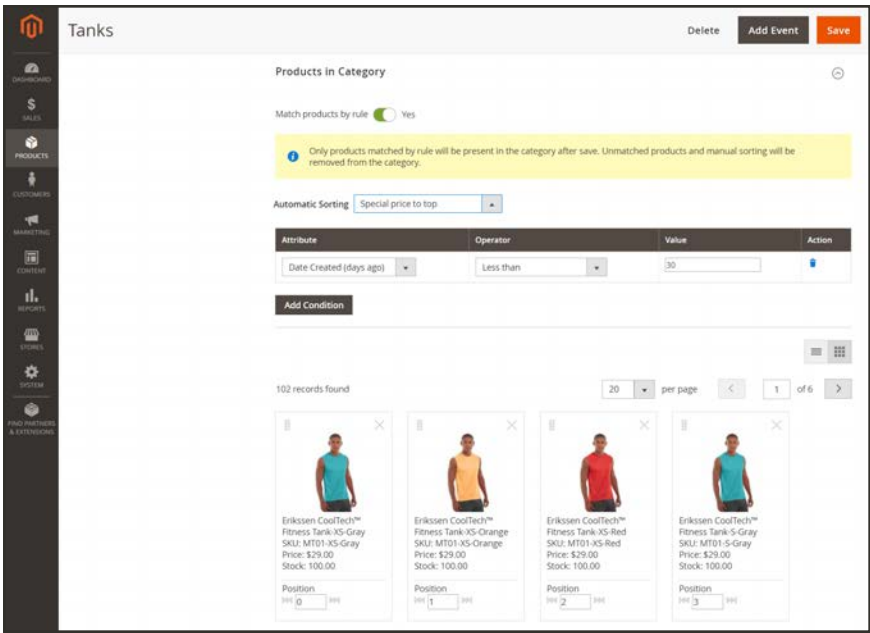
CONTROL	DESCRIPTION
	View as List
	View as Tiles
<input type="radio"/> No <input checked="" type="radio"/> Yes	Match by Rule
	Drag
	Position
	Remove from Category
<input type="text" value="20"/>  per page	View Per Page
 <input type="text" value="1"/> of 1 	Go To Next / Previous



# Creating Category Rules

Category rules dynamically change the product selection according to a set of conditions. Each category can have only one category rule, although the single rule can have multiple conditions. For example, you can create a category rule for a specific brand. Products of the same brand are automatically added to the list, even if they’re not assigned to the same category. You can add as many conditions to the expression as needed to describe the products that you want to include.

Each condition consists of an attribute, value, and logical operator. Only attributes with the “Use in Product Listing” property set to “Yes” can be used in category rules. If you want to use an attribute that is not included in product listings, open the attribute in edit mode, and set “Use in Product Listing” to “Yes.” Although Date attributes are not supported, you can use the Date Created or Date Modified attributes to define a date, or range of dates. For example, to include only products that were created during the past week, set Date Created to a value of “<7.”



Category Product Rule

Category product rules can speed up the process of assigning specific products to categories, based on conditions that determine which products appear in the category. The attributes that can be used with category product rules are specified in the Visual Merchandiser configuration.

Use caution when applying a category product rule, because any products that do not meet the condition are removed from the category. For example, if you create a rule that includes only purple tank tops, all other tank tops are removed from the category.

### To create a category rule:

1. In the category tree, open the category to be edited.
2. In the **Products in Category** section, set **Match products by rule** to the "Yes" position.

The automatic sorting and condition options appear.

3. Tap **Add Condition**, and do the following:
  - a. Choose the **Attribute** that is the basis of the condition.
  - b. Choose the **Operator** that is needed to form the expression.
  - c. Enter the **Value** that is to be matched.

Attribute	Operator	Value	Action
Choose a selection...	Choose a selection...		

Add Condition

*Add Condition to Category Rule*

4. Repeat this process for each attribute that is needed to describe the condition(s) to be met. For example, to match products that were created between 7 and 30 days ago, do the following:
  - a. Set **Date Created** to "Less than 30."
  - b. Set **Logic** to "AND."
  - c. Set **Date Modified** to "Greater than 7."
5. To apply a sort order automatically to the dynamically generated product list, set **Automatic Sorting** to one of the following:
  - Move out of stock to bottom
  - Special price to top
6. When complete, tap **Save Category**.

### Menu Options

OPTION	DESCRIPTION
Match products by rule	Determines if the list of products in the category is dynamically generated by a category rule. Options: Yes / No
Automatic Sorting	Automatically applies a sorting order to the list of category products. Options:

**Menu Options (cont.)**

OPTION	DESCRIPTION
Add Condition	Adds an additional condition to the rule.

**CONDITIONS**

Attribute	<p>Determines the attribute that is used as the basis of the condition. Options:</p> <table> <tr> <td>Clone Category ID (s)</td><td>Dynamically clones products from multiple categories based on Category ID.</td></tr> <tr> <td>Color</td><td>Includes products based on color..</td></tr> <tr> <td>Date Created (days ago)</td><td>Includes products based on the number of days since the products were added to the catalog.</td></tr> <tr> <td>Date Modified (days ago)</td><td>Includes products based on the number of days since the products were last modified.</td></tr> <tr> <td>Name</td><td>Includes products based on the product name.</td></tr> <tr> <td>Price</td><td>Includes products based on price.</td></tr> <tr> <td>Quantity</td><td>Includes products based on the quantity in stock.</td></tr> <tr> <td>SKU</td><td>Includes products based on SKU.</td></tr> </table>	Clone Category ID (s)	Dynamically clones products from multiple categories based on Category ID.	Color	Includes products based on color..	Date Created (days ago)	Includes products based on the number of days since the products were added to the catalog.	Date Modified (days ago)	Includes products based on the number of days since the products were last modified.	Name	Includes products based on the product name.	Price	Includes products based on price.	Quantity	Includes products based on the quantity in stock.	SKU	Includes products based on SKU.
Clone Category ID (s)	Dynamically clones products from multiple categories based on Category ID.																
Color	Includes products based on color..																
Date Created (days ago)	Includes products based on the number of days since the products were added to the catalog.																
Date Modified (days ago)	Includes products based on the number of days since the products were last modified.																
Name	Includes products based on the product name.																
Price	Includes products based on price.																
Quantity	Includes products based on the quantity in stock.																
SKU	Includes products based on SKU.																
Operator	<p>Specifies the operator that is applied to the attribute value to meet the condition. Unless an operator is specified, "Equal" is used as the default. Options:</p> <p>Equal</p> <p>Not equal</p> <p>Greater than</p> <p>Greater than or equal to</p> <p>Less than</p> <p>Less than or equal to</p> <p>Contains</p>																
Value	Specifies the value the attribute must have to meet the condition.																
Logic	<p>The Logic column is used to define multiple conditions, and appears only when an additional condition is added. .Options:</p> <p>OR / AND</p>																

## Configuring Visual Merchandiser

The Visual Merchandiser configuration determines the attributes that can be used in the merchandising window, the minimum stock threshold, and identifies the attribute used for color, and the order of color values.

*General Options*

### To configure Visual Merchandiser:

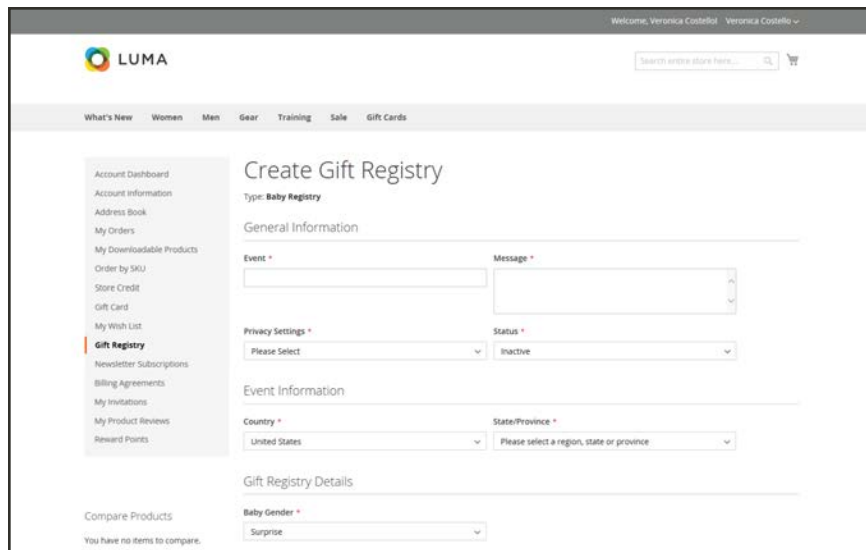
1. On the Admin sidebar, tap **Stores**. Then under Settings, choose **Configuration**.
2. In the panel on the left, under **Catalog**, choose **Catalog**.
3. Expand ☯ the **Visual Merchandising Options** section. Then, do the following:
  - a. In the **Attributes for Category Rules** list, select each attribute that you want to make available for visual merchandising. To choose multiple items, hold down the Ctrl key, and click each item.
  - b. Enter the **Minimum Stock Threshold** for a product to appear in the Visual Merchandiser window.
  - c. Enter the **Color Attribute Code**. The default value is `color`. If your catalog uses a different attribute, enter the attribute name in lowercase.
  - d. In the **Color Order** box, enter each color value on a separate line and in sequence, to determine the priority of each color.
4. When complete, tap **Save Config**.



## CHAPTER 25:

# Gift Registries

Magento Commerce gives your customers the ability to create gift registries for special occasions, and to invite their friends and family to purchase their gifts from the gift registry. Magento keeps track of all items purchased and the quantities remaining.



*Create Gift Registry in Customer Dashboard*

The gift registry owner can add products to the registry from their **customer dashboard**. In addition, products can be transferred from the wish list or cart. The store administrator can view and share customer gift registries, and perform maintenance such as adding items from the customer's cart, updating quantities, or deleting a gift registry.

To access a gift registry, recipients can click the link in the email they receive, or search by the recipient's name, email, or gift registry ID. In most stores, the footer of each page has a link to the gift registry, although the location might vary by theme. In addition, the **Widget** tool can be used to place **Gift Registry Search** anywhere in your store.

Registry visitors who want to make a purchase can add the item to their carts directly from the gift registry. When the order is placed, the gift registry is updated to reflect the purchase.

## Gift Registry Workflow

1

**Configure the store's gift registry.** The store administrator enables the gift registry, and sets up the registry type and attributes.

2

**Customers create their own registries.** A customer creates a new gift registry from their store account for an upcoming occasion, and completes the required fields in each section of the gift registry. After adding items to the registry, it can be shared with friends and family.

3

**Invitations are sent.** A link to the gift registry is included in each invitation.

If **Gift Registry Search** is available in the store, customers can search for specific gift registries by name, email address, or gift registry ID.

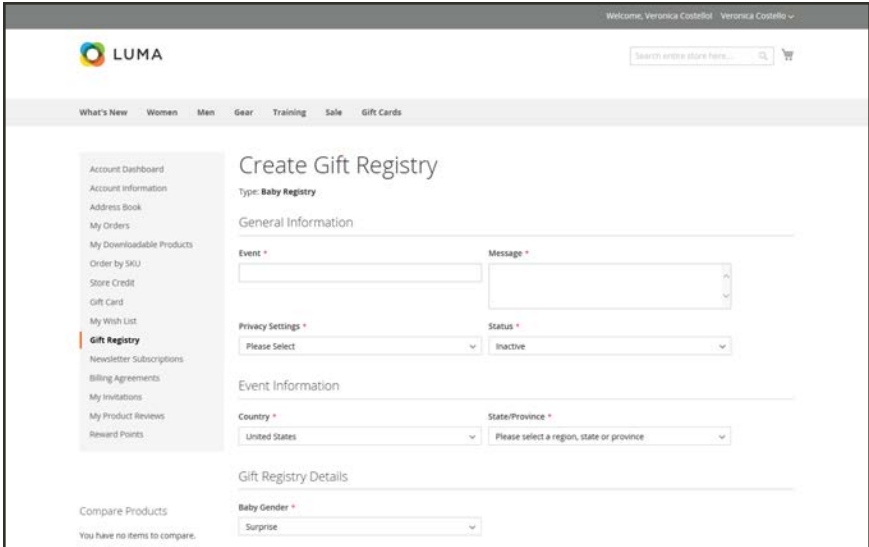
4

**Invitation recipients place orders.** Those who receive an invitation can place an order for any item directly from the gift registry.

As items are sold, Magento updates the gift registry item counts, and notifies the gift registry owner.

# Gift Registry in Customer Account

Customers can create and manage gift registries from their accounts. The account dashboard includes the information that is needed for the type of registry.



Gift Registry Information

## Gift Registry Sections

SECTION	DESCRIPTION
General Information	The General Information section typically includes the name of the event, a message or description of the event, privacy settings, and event status.
Event Information	The Event Information section includes the location and date of the event. For a wedding, it might also include the number of guests each person can bring.
Gift Registry Details	The Gift Registry Details might include additional information that is specific to the occasion.
Registrant Information	The Registrant Information section includes the name and contact information of each person who is to receive notification of the registry. For a wedding registry, the Role field might be included to associate the registrant as a friend of the bride or groom.
Shipping Address	The Shipping Address section shows where gifts are to be sent, and includes the information a carrier needs to deliver the package.



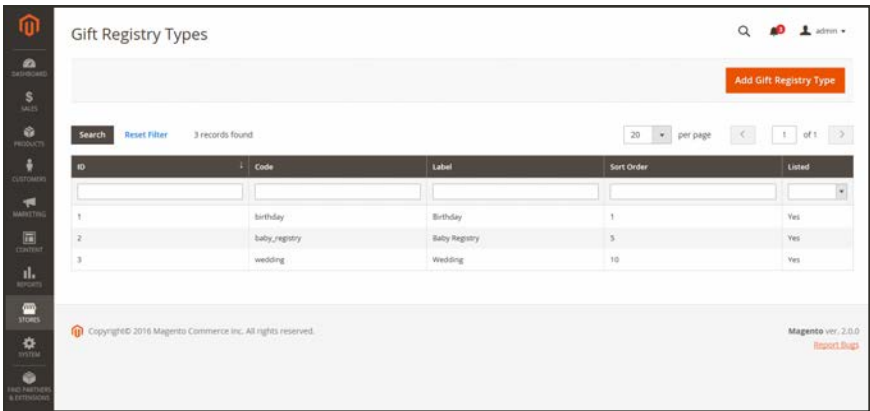
# Setting Up a Gift Registry

A gift registry can be created for any type of event, such as a wedding, birthday, anniversary, new baby, or any other special occasion. By default, Magento includes the following special events:

- Baby
- Birthday
- Wedding

When you create a new registry, it becomes an option in the list of gift registry types in the customer’s account.

You can use one of the three prepared gift registries, or create your own custom registry. Each gift registry type includes a number of attributes, which are the data entry fields that a customer completes to create a gift registry. The attributes provide additional information about the event, time and location, or any other information that is needed. Depending on the input type, some attributes have multiple options. For example, the gift registry type “Wedding,” has the attribute “Role,” with the options, “Bride,” “Groom,” and “Partner.” To learn more about attributes and input types, see: [Attributes](#).



*Gift Registry Types*

### To use a prepared gift registry:

1. On the Admin sidebar, tap **Stores**. Then under **Other Settings**, choose **Gift Registry**.  
The birthday, wedding, and baby registries are ready for customers to use from their accounts.
2. Make sure to complete the **email template** configuration, so they reflect your brand.

### To create a custom gift registry:

1. On the Admin sidebar, tap **Stores**. Then under **Other Settings**, choose **Gift Registry**.
2. In the upper-right corner, tap **Add Gift Registry Type**.
3. Under **General Information**, complete the following:
  - a. Enter a unique **Code** to identify the gift registry internally. The code must begin with a lowercase letter. The rest of the code can be any combination of lowercase letters (a-z), numbers (0-9), and underscore (\_).
  - b. In the **Label** field, enter a name for the gift registry, as you want it to appear in the store. This label will be an option in the list of gift registry types that are available to the customer.
  - c. In the **Sort Order** field, enter a number to determine the order that this gift registry appears when listed with other types.
  - d. To activate the gift registry, set **Is Listed** to “Yes.”

#### *General Information*

4. Examine each section of the Gift Registry to determine the type of information you want to include.
5. In the panel on the left, choose **Attributes**. Then, tap **Add Attribute**.

*New Gift Registry Attribute*

6. For each attribute, do the following:

a. Assign a unique **Code** to identify the attribute internally. The code can be up to fifteen characters in length, and must begin with a lowercase letter. The rest of the code can include lowercase letters(a-z), numbers (0-9) and the underscore ( ) character to separate words.

b. Choose the **Input Type** to be used for data entry. You can use one of the custom or static types.

Some input types have additional properties. For example, the Event Location has additional properties to make the event searchable, and included in your store's public list of gift registries. If the input type has multiple options, tap **Add New Option**. Then complete the following information for each option:

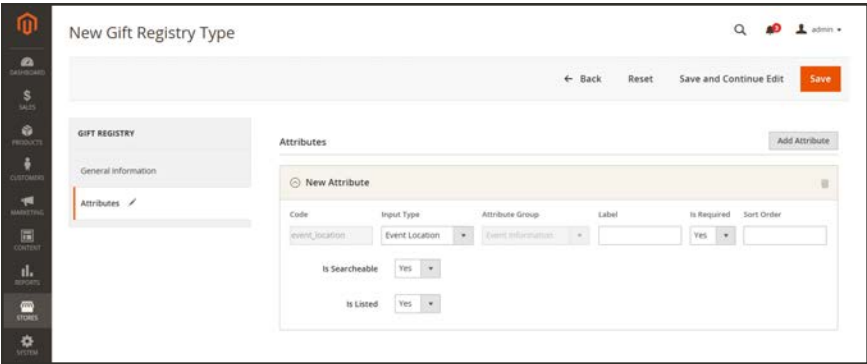
c. Set **Attribute Group** to the section in the gift registry where you want the attribute to appear.

d. In the **Label** field, enter a name to identify the data entry field.in the registry.

e. If the customer is required to make a selection or enter a value in the field, set **Is Required** to "Yes."

f. In the **Sort Order** field, enter a number to determine the sequence in which this gift registry appears when listed with other gift registries that might be available in the store.

7. To add another option, tap **Add New Option**. Each new option added appears in a new section at the top. Then, repeat this process for the new attribute.



Attribute with Multiple Options

8. When complete, tap **Save**.

Field Descriptions

ATTRIBUTE	DESCRIPTION				
GENERAL INFORMATION					
Code	A unique name to identify the gift registry type internally. The first character of the code must be a lowercase letter. The rest of the code can be any combination of lowercase letters (a-z), numbers (0-9), and the underscore character (_).				
Label	The name of the gift registry type that appears in the store.				
Sort Order	Determines the sequence in which this gift registry type appears when listed with other types.				
Is Listed	Determines if the gift registry type is available to customers in the store. Options: Yes / No.				
ATTRIBUTES					
Code	A unique name to identify the attribute internally. The code can include any combination of lowercase letters (a-z), numbers (0-9), and the underscore character (_).				
Input Type	Determines the type of data and input control that is associated with the attribute, according to type. Options: <div>Custom Types</div> <table><tr><td>Text</td><td>Displays the attribute as a text field.</td></tr><tr><td>Select</td><td>Displays the attribute as a drop-down list.</td></tr></table>	Text	Displays the attribute as a text field.	Select	Displays the attribute as a drop-down list.
Text	Displays the attribute as a text field.				
Select	Displays the attribute as a drop-down list.				

**Field Descriptions (cont.)**

ATTRIBUTE	DESCRIPTION						
Date	Displays the attribute as a date field.						
Country	Displays the attribute as a drop-down list of countries. Set Show Region to: Yes / No.						
<b>Static Types</b>							
Event Date	Determines how the date attribute is used in the store. Options: <table> <tr> <td>Searchable</td><td>Determines if the attribute is available for Advanced Search. Options include: Yes / No.</td></tr> <tr> <td>Is Listed</td><td>Determines if the event is included in the list of events that is available in the store. Options include: Yes / No.</td></tr> <tr> <td>Date Format</td><td>Determines the format of the event date. Options include: Short (3/23/2014) Medium (Mar 23, 1914) Long (March 23, 1914) Full (Sunday, March 23, 2014)</td></tr> </table>	Searchable	Determines if the attribute is available for Advanced Search. Options include: Yes / No.	Is Listed	Determines if the event is included in the list of events that is available in the store. Options include: Yes / No.	Date Format	Determines the format of the event date. Options include: Short (3/23/2014) Medium (Mar 23, 1914) Long (March 23, 1914) Full (Sunday, March 23, 2014)
Searchable	Determines if the attribute is available for Advanced Search. Options include: Yes / No.						
Is Listed	Determines if the event is included in the list of events that is available in the store. Options include: Yes / No.						
Date Format	Determines the format of the event date. Options include: Short (3/23/2014) Medium (Mar 23, 1914) Long (March 23, 1914) Full (Sunday, March 23, 2014)						
Event Country	Displays the attribute as a drop-down list of countries. Set Show Region to: Yes / No.						
Event Location	The location of the event that is related to the gift registry.						
Role	The role that identifies who the gift is for. For example, "Bride," "Groom," or "Partner."						
Attribute Group	Select the group where the attribute is listed in the gift registry. Options:						

**Field Descriptions (cont.)**

ATTRIBUTE	DESCRIPTION
Event Information	Groups all gift registry attributes that add the information about the gift registry event, its time, place, etc.
Gift Registry Properties	Combines all attributes that add information directly about the gift registry.
Privacy Settings	Lists the attributes that add information about the gift registry event privacy.
Recipients Information	Groups the attributes that provide information about the person who creates a gift registry.
Label	The name that identifies the attribute in the customer's account dashboard.
Is Required	Indicates if the attributes is a required entry. The gift registry cannot be saved until all required attributes are complete. Options: Yes / No.
Sort Order	Determines the sequence in which attribute appears when listed with other attributes.

## Configuring Gift Registries

Before you can offer gift registries to your customers, you must enable gift registries and configure the related email notifications. Magento sends the following email notifications in response to events in the gift registry workflow.

- When a new gift registry is created, an email is sent to the owner with a link to registry that can be shared.
- Optionally, the store can send notification to friends and family of the gift registry owner, with a link to the gift registry.
- The owner is notified when items are purchased from the gift registry, but does not indicate the purchaser.

Magento has predefined templates for each of these email messages that can be customized for your brand.

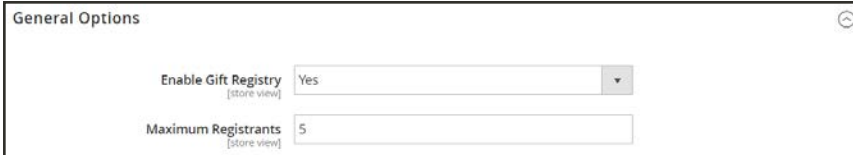
**Process Overview:**

Step 1: [Enable Gift Registries](#)

Step 2: [Configure Email Notifications](#)

## Step 1: Enable Gift Registries

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Customers**, choose **Gift Registry**
3. Expand ☺ the **General Options** section, and do the following:




The screenshot shows the 'General Options' section of the Gift Registry configuration. It contains two fields: 'Enable Gift Registry' with a dropdown menu set to 'Yes', and 'Maximum Registrants' with a text input field containing the number '5'. Both fields have a '(store view)' link below them. A close button (⊘) is in the top right corner.

*General Options*

- a. The Gift Registry is enabled by default. If necessary, set **Enable Gift Registry** to “Yes.”
- b. In the **Maximum Registrants** field, enter the maximum number of people that can be invited to participate in a gift registry event.

## Step 2: Configure Email Notifications


1. Expand ☺ the **Owner Notification** section, and do the following:



The screenshot shows the 'Owner Notification' section of the Gift Registry configuration. It contains two fields: 'Email Template' with a dropdown menu set to 'New Registry (Default)', and 'Email Sender' with a dropdown menu set to 'General Contact'. Both fields have a '(store view)' link below them. A close button (⊘) is in the top right corner.

*Owner Notification*

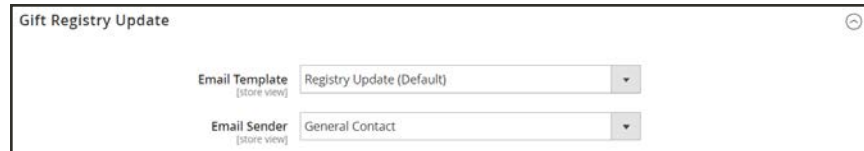
- a. Choose the **Email Template** that notifies gift registry owners when their registries are created.
  - b. Choose the **store contact** that appears as the **Email Sender** of the message.
2. Expand ☺ the **Gift Registry Sharing** section, and do the following:



The screenshot shows the 'Gift Registry Sharing' section of the Gift Registry configuration. It contains three fields: 'Email Template' with a dropdown menu set to 'Registry Sharing (Default)', 'Email Sender' with a dropdown menu set to 'General Contact', and 'Maximum Sent Emails Threshold' with a text input field containing the number '3'. All three fields have a '(store view)' link below them. A close button (⊘) is in the top right corner.

*Gift Registry Sharing*

- a. Choose the **Email Template** that notifies gift registry recipients when a registry is shared with them.
  - b. Choose the store identify that appears as the **Email Sender** of the message.
  - c. In the **Maximum Sent Emails Threshold** field, enter the maximum number of emails that can be sent at one time.
3. Expand ☺ the **Gift Registry Update** section, and do the following:

A screenshot of the 'Gift Registry Update' configuration section in a Magento interface. The section has a title 'Gift Registry Update' and a collapse icon (☺) in the top right corner. Inside the section, there are two dropdown menus. The first is labeled 'Email Template' with a small '(store view)' text below it, and it is set to 'Registry Update (Default)'. The second is labeled 'Email Sender' with a small '(store view)' text below it, and it is set to 'General Contact'.

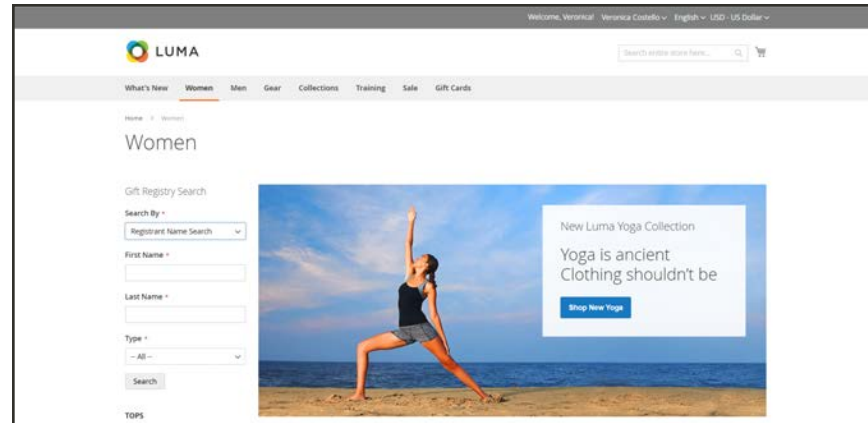
*Gift Registry Update*

- a. Choose the **Email Template** that notifies gift registry owners of changes to the registry.
  - b. Choose the store identify that appears as the **Email Sender** of the message.
4. When complete, tap **Save Config.**
5. When prompted, update the cache. After the cache is refreshed, Gift Registry appears in the Stores menu under Other Settings, and becomes available in customer accounts.



## Gift Registry Search

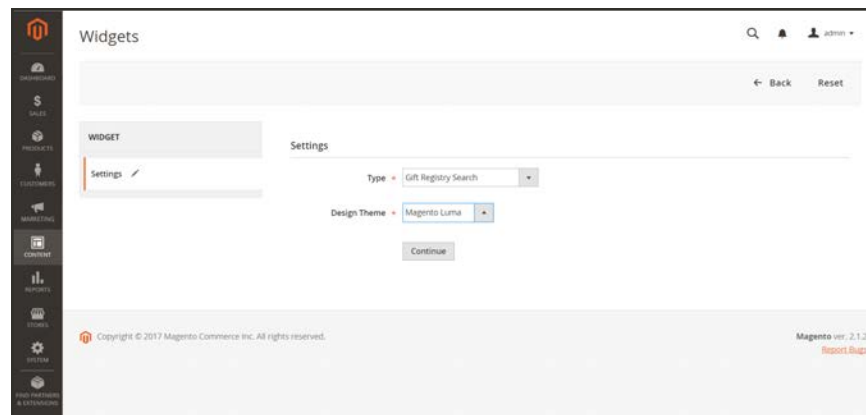
The **Widget** tool can be used to place a gift registry search box most anywhere in your store. You can specify the search options to be available to customers, including: name, email address, and gift registry ID. When the customer clicks the Search button, the results appear on the Gift Registry Search page. If the search returns no results, the customer can try again with other parameters.

The screenshot shows the LUMA website interface. At the top, there's a navigation bar with the LUMA logo, a search bar, and a shopping cart icon. Below the navigation bar, there's a main menu with links: What's New, Women, Men, Gear, Collections, Training, Sale, and Gift Cards. The 'Women' link is highlighted. The main content area is titled 'Women' and features a 'Gift Registry Search' widget. The widget has a 'Search By' dropdown menu set to 'Registrant Name Search'. Below this are input fields for 'First Name' and 'Last Name', and a 'Type' dropdown menu set to 'All'. A 'Search' button is located at the bottom of the widget. To the right of the search widget is a promotional banner for the 'New Luma Yoga Collection' with the text 'Yoga is ancient Clothing shouldn't be' and a 'Shop New Yoga' button. The banner image shows a person in a yoga pose on a beach.

*Gift Registry Search*

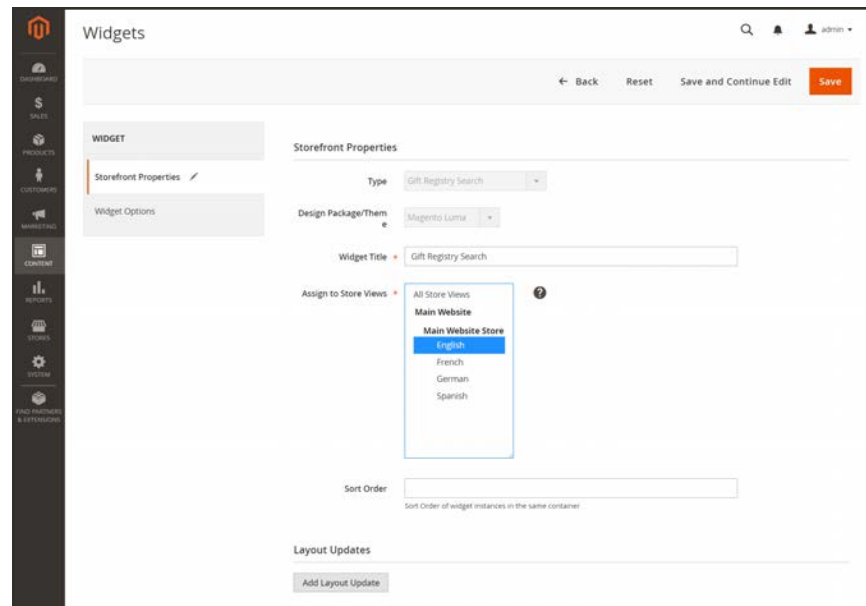
### To add gift registry search:

1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Widgets**.
2. In the upper-right corner, tap **Add Widget**.
3. In the Settings section, do the following:
  - a. Set **Type** to “Gift Registry Search.”
  - b. Set **Design Theme** to the theme that is used by the store.
  - c. Tap **Continue**.

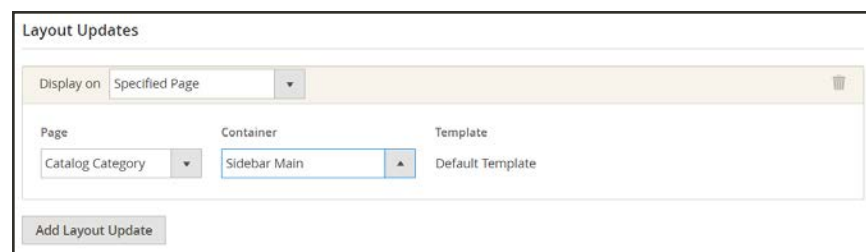


*Gift Registry Search Settings*

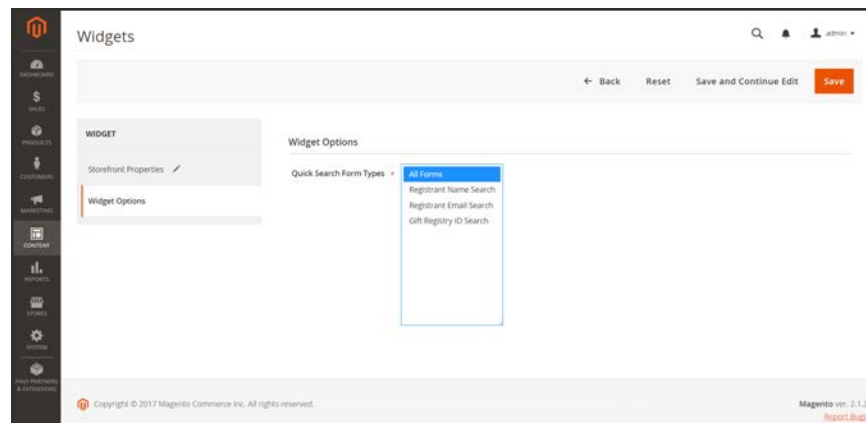
4. In the Storefront Properties section, do the following:
  - a. Enter a **Widget Title** for internal reference.
  - b. Set **Assign to Store Views** to the store views where Gift Registry Search is to be available.
  - c. Set **Sort Order** to determine the order that the Gift Registry Search block appears if there are other blocks assigned to the same location on the page.

*Storefront Properties*

5. In the **Layout Updates** section, tap **Add Layout Update**. To determine where the Gift Registry Search appears in the store, do the following:
  - a. Set **Display On** to the pages in your store where you want Gift Registry Search block to appear.
  - b. If applicable, choose the **Categories** where you want it to appear.
  - c. Set **Container** to the location on the page where you the Gift Registry Search block to be placed.

*Layout Update*

6. In the panel on the left, choose **Widget Options**. To determine how visitors to your site can search for gift registries, select as many of the following that apply:
- All Forms
  - Registrant Name Search
  - Registrant Email Search
  - Gift Registry ID Search



*Widget Options*

7. When complete, tap **Save**.
8. When prompted to refresh the page cache, tap the link in the message at the top of the workspace and follow the instructions.

## Field Descriptions

FIELD	DESCRIPTION
<b>SETTINGS</b>	
Type	Identifies “Gift Registry Search” as the type of Widget.
Design Theme	The theme that is used by the store where the Gift Registry Search is to appear.
<b>STOREFRONT PROPERTIES</b>	
Widget Title	A name for internal reference.
Assign to Store Views	Identifies the store views where the Gift Registry Search is to be available.
Sort Order	Indicates the order that Gift Registry Search block appears if there are other blocks assigned to appear in the same location.
<b>LAYOUT UPDATES</b>	
Display On	Indicate the specific pages, or types of pages where Gift Registry Search is to appear.
Categories	If applicable, identifies the category pages where Gift Registry Search is to appear.
Container	Indicates the page layout block where Gift Registry Search will be placed. The options vary by template and theme.
<b>WIDGET OPTIONS</b>	
Quick Search Form Types	<p>Determines the types of searches that can be performed with Gift Registry Search. Options:</p> <ul style="list-style-type: none"> <li>All Forms</li> <li>Registrant Name Search</li> <li>Registrant Email Search</li> <li>Gift Registry ID Search</li> </ul>

## CHAPTER 26:

# Rewards & Loyalty

Magento's reward points system gives you the ability to implement unique programs that drive customer engagement and promote customer loyalty. Points can be awarded for a wide range of transaction and customer activities, and the configuration can be set to control the point allotment, balance, and expiration. Customers can redeem points toward purchases, based on the conversion rate that you establish between reward points and currency. A few examples:

### Shopping Cart Price Rules

---

Points can be rewarded to customers on the basis of a shopping cart rule. They can be rewarded as the only action of the price rule, or in conjunction with a discount.

### Customer Balance

---

Reward point balances can be managed by admin users per customer. If enabled in the storefront, customers can also view the details of their points balance.

### Redeeming Points

---

Points can be redeemed by admin users and (if enabled) customers during checkout. In the Payment Method section, a Use my Reward Points checkbox appears above the enabled payment methods. The available points and monetary exchange rate is included. If the available balance is greater than the order grand total, no additional payment methods is required. The amount of reward points applied to the order appears with the order totals, subtracted from the grand total, similar to a store credit or gift cards. If reward points are used in conjunction with store credit or a gift card, the reward points are deducted first, and the store credit or gift card is deducted if the order total is greater than the redeemable amount of reward points.

### Refunding to Reward Points

---

Orders placed with reward points can be refunded to the reward points balance up to the amount redeemed in the order. On the New Credit Memo page, the amount of points to be applied to the customer's balance can be entered. By default, the field contains the full amount of points that were used in the order.

# Configuring Reward Points

The Reward Points configuration determines how reward points are presented in the store, and defines the basic operating parameters.

Reward Points

Enable Reward Points Functionality

[global]

Yes

Enable Reward Points Functionality on Storefront

[website]

Yes

Customers May See Reward Points History

[website]

Yes

Rewards Points Balance Redemption Threshold

[website]

An empty value disables this limitation.

Cap Reward Points Balance At

[website]

An empty value disables this limitation.

Reward Points Expire in (days)

[website]

An empty value disables this limitation.

Reward Points Expiry Calculation

[website]

Static

"Static" defines the expiration date as precisely when the balance increases. "Dynamic" does not have an expiration date, but calculates one when the balance is checked for expiry.

Refund Reward Points Automatically

[global]

No

Deduct Reward Points from Refund Amount Automatically

[global]

Yes

Landing Page

[store view]


Reward Points

Reward Points

Process Overview:

- Step 1: Configure the Reward Points
- Step 2: Configure Points Earned for Customer Activities
- Step 3: Complete the Email Notification Settings

## Step 1: Configure the Reward Points


1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Customers**, choose **Reward Points**.
3. Expand  the **Reward Points** section. Then, do the following:
  - a. To activate reward points, set **Enable Reward Points Functionality** to “Yes.”
  - b. To allow customers to earn their own reward points, set **Enable Reward Points Functionality on Storefront** to “Yes.”
  - c. To allow customers to see a detailed history of their rewards, set **Customers May See Reward Point History** to “Yes.”
4. In the **Reward Points Balance Redemption Threshold** field, enter the number of points that must accrue before they can be redeemed. Leave blank for no minimum. Then, do the following:
  - a. Enter the maximum number of points a customer can accrue in the **Cap Reward Points Balance At** field. Leave blank for no limit.
  - b. Enter the number of days before the reward points expire in the **Reward Points Expire in (days)** field. Leave blank for no expiration.
  - c. Set **Reward Points Expiry Calculation** to one of the following:
 

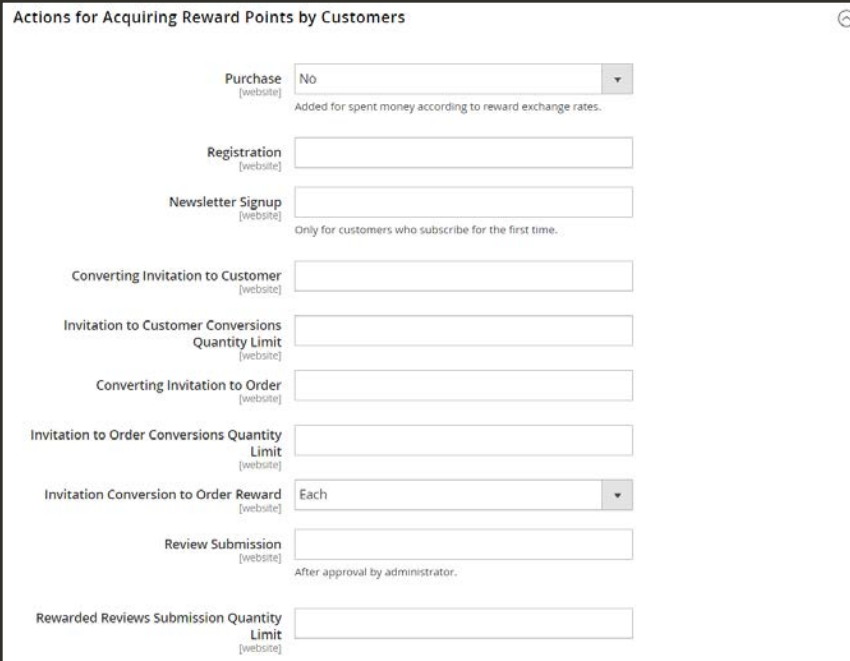
Static	Determines the remaining lifetime of reward points based on the number of days set in the configuration. If the expiration limit in the configuration changes, the expiration date of existing points does not change.
Dynamic	Calculates the number of days left whenever the reward point balance increases. If the expiration limit in the configuration changes, the expiration of all existing points update accordingly.
  - d. If you want to refund available reward points automatically, set **Refund Reward Points Automatically** to “Yes.”
  - e. If you want to automatically deduct reward points from the amount of a refund, set **Deduct Reward Points from Refund Amount Automatically** to “Yes.”
5. Set **Landing Page** to the content page that explains your reward points program. Make sure to update the default Rewards Points page with your own information.
6. When complete, tap **Save Config.**




## Step 2: Configure Points Earned for Customer Activities

In this step, the number of reward points that can be earned for various customer activities is specified. When customers complete an action that has points assigned, a message appears to the customer that indicates how many points they have earned.

1. Expand  the **Actions for Acquiring Reward Points by Customer** section. Then, do the following:



**Actions for Acquiring Reward Points by Customers**

**Purchase** [website]    
Added for spent money according to reward exchange rates.

**Registration** [website]


**Newsletter Signup** [website]   
Only for customers who subscribe for the first time.

**Converting Invitation to Customer** [website]

**Invitation to Customer Conversions Quantity Limit** [website]

**Converting Invitation to Order** [website]

**Invitation to Order Conversions Quantity Limit** [website]

**Invitation Conversion to Order Reward** [website]  

**Review Submission** [website]   
After approval by administrator.

**Rewarded Reviews Submission Quantity Limit** [website]

*Actions for Acquiring Reward Points by Customer*

- a. In the **Purchase** field, enter the number of points earned for placing an order.
  - b. In the **Registration** field, enter the number of points earned for opening a customer account.
  - c. In the **Newsletter Signup** field, enter the number of points earned by registered customers who subscribe to a newsletter.
2. In the **Converting Invitation to Customer** field, enter the number of points earned by a customer who sends an invitation, if the recipient then opens a customer account. Then, do the following:
  - a. Enter a number in the **Invitation to Customer Conversions Quantity Limit** field to limit the number of invitation conversions that can be used to earn points for the customer who sends the invitation. Leave blank for no limit.
  - b. In the **Invitation Conversion to Order Reward** field, enter the number of points earned by a customer who sends an invitation, and the recipient places an initial order.

3. In the **Review Submission** field, enter the number of points earned by a customer who submits a review that is approved for publication. Then, do the following:

To limit the number of reviews that can be used to earn points per customer, enter the number in the **Rewarded Reviews Submission Quantity Limit** field. Leave blank for no limit.

4. In the **New Tag Submission** field, enter the number of points earned by the customer when a submitted tag is approved for publication.

To limit the number of tags that can be used to earn points per customer, enter the number in the **Rewarded Tag Submission Quantity Limit** field. Leave blank for no limit.

### Step 3: Complete the Email Notification Settings

1. Expand ☑ the **Email Notification Settings** section. Then, do the following:

*Email Notification Settings*

- a. Set **Email Sender** to the store contact that appears as the sender of balance updates and expiration notifications.
  - b. If you want to subscribe customers by default to be notified of balance updates and upcoming expiration dates, set **Subscribe Customers by Default** to “Yes.”
  - c. Set **Balance Update Email** to the template used for the notification that is sent to customers whenever their point balance is updated.
  - d. Set **Reward Points Expiry Warning Email** to the template used for the notification that is sent to customers when the expiration limit for a batch of points is reached.
  - e. In the **Expiry Warning Before (days)** field, enter the number of days before points expire that notification is sent.
2. When complete, tap **Save Config.**

## Reward Exchange Rates

Reward Exchange Rates determine the number of points that are earned based on the order amount, as well as the value of the points earned. Different exchange rates can be applied to different websites and different customer groups. If multiple exchange rates from different websites and customer groups apply to the same customer, the following rules of priority apply:

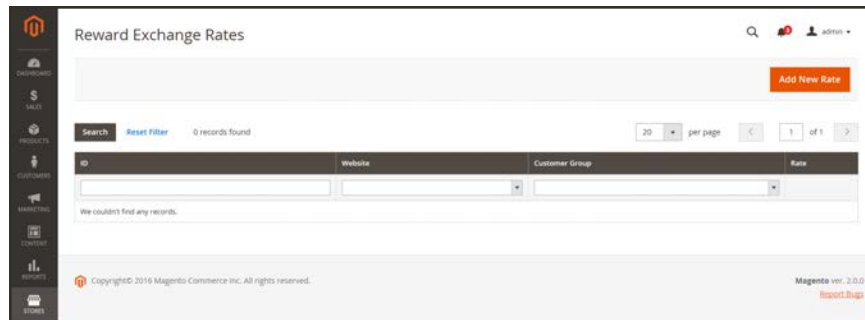
### Exchange Rate Priority

- 1 Applies to specific website and specific customer group.
- 2 Applies to all websites and a specific customer group.
- 3 Applies to a specific website and all customer groups.
- 4 Applies to all websites and all customer groups.

When converting currency to points, the amount of points cannot be divided. Any currency remainder is rounded down. For example, if \$2.00 converts to 10 points, points will be earned in groups of \$2.00. Therefore, a \$7.00 order would earn 30 points, and the remaining \$1.00 would be rounded down. The monetary amount of the order is defined as the amount which the merchant receives, or the grand total minus shipping, tax, discounts, store credit, and gift cards. The points will be earned the moment when there are no non-invoiced items in the order (all items are either paid or canceled). If an Admin user does not want to allow customers to earn Reward Points for canceled orders, those points can be manually deducted from the Manage Customers page.

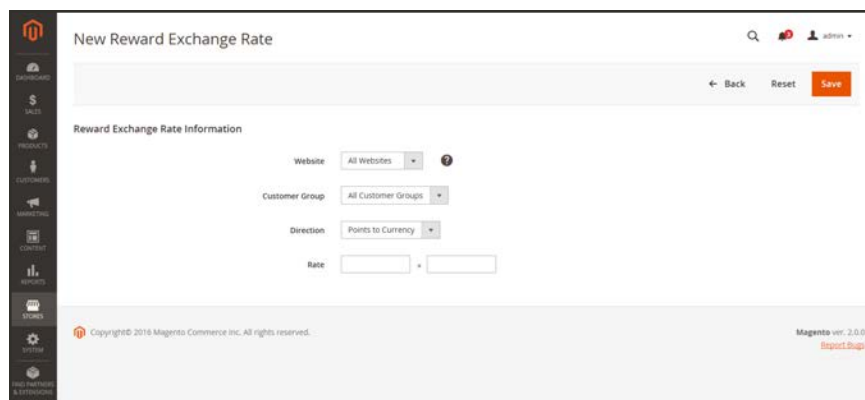
### To set up exchange rates:

1. On the Admin sidebar, tap **Stores**. Then under **Other Settings**, choose **Reward Exchange Rates**.
2. In the upper-right corner, tap **Add New Rate**.



*Reward Exchange Rates*

3. In the **Reward Exchange Rate Information** section, do the following:



*Reward Exchange Rate Information*

- a. Set **Website** to the sites where the reward exchange rate applies.
- b. Set **Customer Group** to the groups where the reward exchange rate applies.
- c. Set **Direction** to one of the following:
  - Points to Currency
  - Currency to Points

For either Direction setting, the amount is represented in the base currency of the website.

4. Enter the **Rate** values according to the Direction setting.

**Points to Currency** In the first **Rate** field, enter the number of points. In the second **Rate** field, enter the monetary value of the points.

**Currency to Points** In the first **Rate** field, enter the monetary value. In the second **Rate** field, enter the number of points that is represented by the monetary value.

When converting points to currency, the amount of points cannot be divided. For example, if 10 points converts to \$2.00, points must be redeemed in groups of ten. Therefore, 25 points would redeem for \$4.00, with 5 points remaining in the customer's balance.

5. When complete, tap **Save**.

### Field Descriptions

FIELD	DESCRIPTION
Website	The website(s) where the reward rates apply.
Customer Group	The customer group(s) to which the reward rates apply.
Direction	<p>Determines which type of transaction the exchange rate define. Options include:</p> <p><b>Points to Currency</b> Defines the number of points that can be applied as credit towards the amount of an order. In the first rate field, enter the number of points. In the second Rate field, enter the monetary value of the points.</p> <p><b>Currency to Points</b> Defines the amount of an order that can earn the customer a number of points. In the first Rate field, enter the monetary value. In the second Rate field, enter the number of points represented by the monetary value.</p>

## Using Reward Points in Price Rules

Reward points can be awarded to customers on the basis of a **cart price rule**. The award of points can be the only action of the price rule, or can be used in combination with a discount.

### To add reward points to a price rule:

1. On the Admin sidebar, tap **Marketing**. Then under **Promotions**, choose **Cart Price Rules**. Then, do one of the following:
  - Open an existing cart price rule.
  - Create a new cart price rule.
2. Scroll down and expand the **Actions** section. Then, enter the amount of points in the **Add Reward Points** field.

The screenshot shows the Magento Admin interface for editing a Cart Price Rule. The rule is titled "\$4 Luma water bottle (save 70%)". The condition is "If an item is FOUND in the cart with ALL of these conditions true:". The "Actions" section is expanded, showing the following settings:

- Apply:** Percent of product price discount
- Discount Amount:** 70
- Maximum Qty Discount is Applied To:** 0
- Discount Qty Step (Buy X):** 0
- Apply to Shipping Amount:** No (Discount amount is applied to subtotal only)
- Discard subsequent rules:** No
- Free Shipping:** No
- Add Reward Points:** (Empty text field)

*Adding Reward Points to Price Rule*

3. Follow the standard instructions to complete the cart price rule.

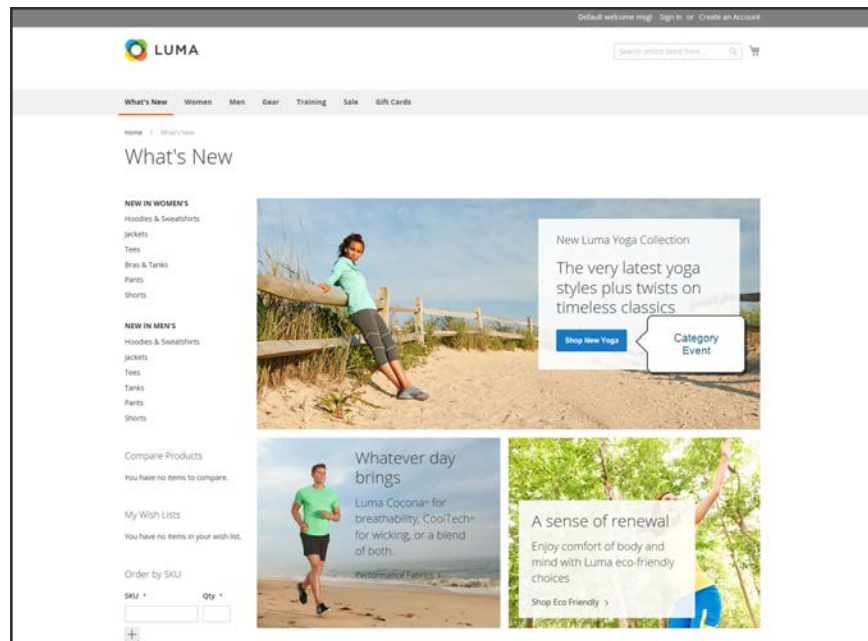
When the price rule is activated, a message appears in the cart to let customers know how many points they can earn by placing the order.



## CHAPTER 27:

# Private Sales & Events

Private sales and other catalog events are a great way to leverage your existing customer base to generate buzz and new leads, or to offload surplus inventory. You can create limited-time sales, limit sales to specific members, or create a standalone private sale page. You can also define invitations and event details. Increase brand loyalty and generate a buzz by giving your best customers the VIP treatment. Offer exclusive access to Member Only sales or private sales to increase brand loyalty. You can also use these sales to liquidate excess merchandise. Customer Groups are extremely useful in setting up these types of Members Only and VIP sales.



*Event on Home Page*



# Event Components

## Categories

---

Each event is associated with a category from your catalog.

## Events

---

Event sales are based on a starting and ending date. You can use a countdown ticker to show the time remaining.

## Event Slider Widget

---

When the Event Slider widget is enabled in the configuration, it appears on the home page and category pages, and lists open and upcoming events, sorted by end date. If two or more events share the same end date, the events are sorted based on the order specified in the configuration.

## Customer Groups

---

Category permissions are based primarily on customer groups.

## Category Permissions

---

Category permissions gives you full control over the specific activities that can take place in a given category.

## Website Restrictions

---

Prevents public access to the site by redirecting to a landing page, login page, or registration page.

## Invitations

---

Email messages are sent with a link to create an account in the store. You can restrict the ability to create an account to only those who receive an invitation.

## Private Sales Reports

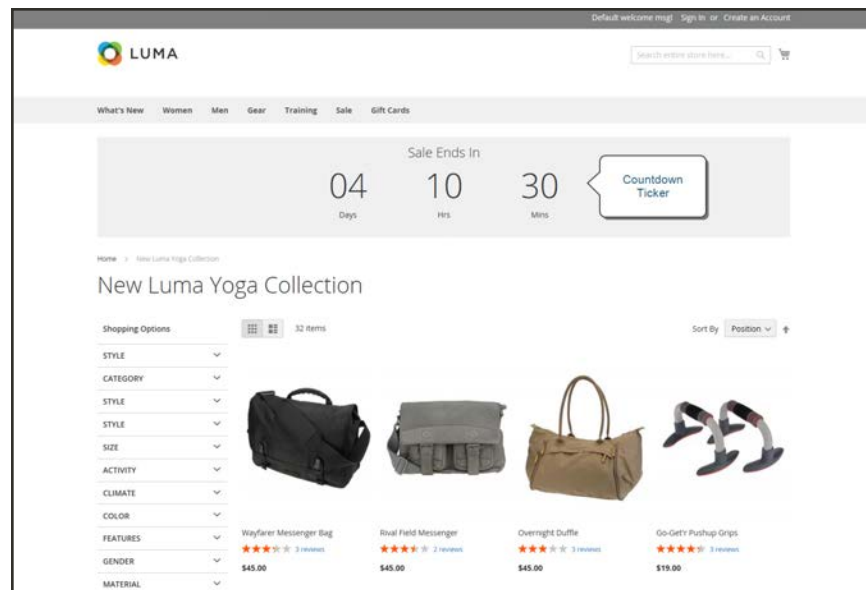
---

The Private Sales Reports provide information about invitations sent, customers invited, and conversions.

## Event Ticker

The ticker block displays a countdown ticker for open events, with the start and end date for upcoming events. If an event has closed, the ticker shows the starting and ending dates.

If the Category Page ticker is enabled for an event, the ticker block appears at the top of the category listing. If the Product Page ticker is enabled, the ticker block also appears at the top of the product page of any product that is associated with the category.



*Event Ticker*

## Configuring Events

Before you can create an event, you must complete the basic configuration to enable events and set up the event block in the sidebar.

### To enable and configure events:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Catalog**, choose **Catalog**.
3. Expand ☑ the **Catalog Events** section. Then, do the following:



The screenshot shows the 'Catalog Events' configuration panel. It contains four settings:

- Enable Catalog Events Functionality** (website): A dropdown menu set to 'Yes'.
- Enable Catalog Event Widget on Storefront** (store view): A dropdown menu set to 'Yes'.
- Number of Events to be Displayed in Event Slider Widget** (store view): A text input field containing the number '5'. Below the field is a note: 'You can override this default value in CMS using the limit="x" variable. Leave empty for no limitation.'
- Events to Scroll per Click in Event Slider Widget** (store view): A text input field containing the number '2'. Below the field is a note: 'You can override this default value in CMS using the limit="x" variable.'

### *Catalog Events*

- a. Set **Enable Catalog Events Functionality** to “Yes.”
  - b. Set **Enable Catalog Event Widget on Storefront** to “Yes.”
  - c. Enter the **Number of Events to be Displayed in the Event Slider Sidebar Widget**. By default, this value is set to 5.
  - d. Enter the number of **Events to Scroll per Click in Event Slider Sidebar Widget**.
4. When complete, tap **Save Config**.

## Restricting Access

Access to a private sale, event, or site can be limited to registered customers who log in, or extended to non-registered customers who must register before gaining access.

**Website Restrictions**

Access Restriction [website] No

Restriction Mode [website] Website Closed

Startup Page [store view] To login form (302 Found)  
Applicable only if restriction mode is set to "Private Sales".

Landing Page [store view] 404 Not Found

HTTP Response [website] 200 OK  
Applicable only if restriction mode is set to "Website Closed". The landing page is rendered as raw HTML.

Enable Autocomplete on login/forgot password forms [website] No ☒ Use system value

### Website Restrictions

#### To set up exclusive access:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **General**.
3. Expand the **Website Restrictions** section, and do the following:.

- a. Set **Access Restriction** to "Yes."
- b. Set **Restriction Mode** to one of the following:
  - Private Sales: Login Only
  - Private Sales: Login and Register
- c. Set **Startup Page** to one of the following:

To login form (302 Found)      Users are redirected to the login form before gaining access to the site.

To landing page (302 Found)      Users are redirected to the specified landing page until they log in.

**Important!** Be sure to include a link to the login page from the landing page so customers can log in to access the site.

- d. Choose the **Landing Page** that appears before customers log in to the private sale site.
- e. To let search engine bots and spiders know that the landing page is correct, and that there are no other pages on the site to index. set **HTTP Response** to "200 OK"

- f.** If you want the fields in the customer login and forgot password forms to be filled automatically from previous entries, set **Enable Autocomplete on login/forgot password forms** to “Yes”.
- 4.** When complete, tap **Save Config.**

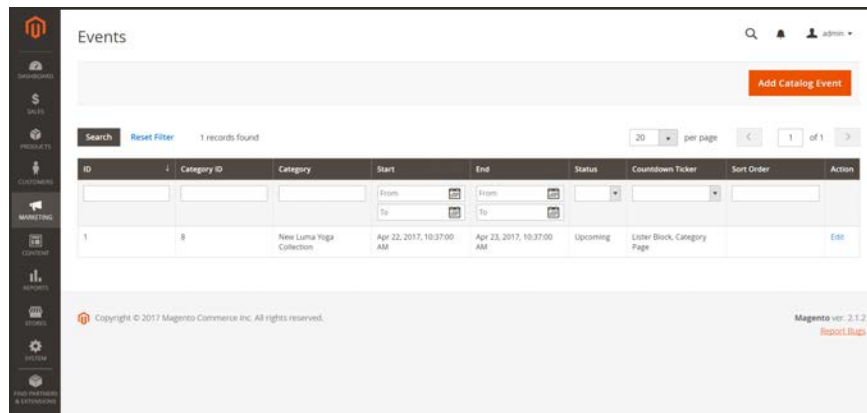
## Sales Restrictions

By default, products that appear in upcoming or closed events are not available for general sale, and the Add to Cart button does not appear on the product list or product page.

To restore the Add to Cart button for a closed event, the event must be deleted. However, if a product is associated with another category that has no selling restrictions, the Add to Cart button does appear on the product page. Similarly, the ticker block does not appear on the product page if the product is associated with another category that has no selling restrictions.

## Creating Events

Each event is associated with a category from your catalog, and only one event can be associated with any given category at a time.



*Manage Catalog Events*

### To create an event:

1. On the Admin sidebar, tap **Marketing**. Then under **Private Sales**, choose **Events**.
2. In the upper-right corner, tap **Add Catalog Event**. Then, do the following:
  - a. In the category tree, choose the category that you want to associate with the event.

Because each category can have only one event at a time, any categories that already have an event are disabled.



*Select Category*



- b. In the **Catalog Event Information** section, do the following:

The screenshot shows the 'New Event' form in the Magento Commerce Admin interface. The form is titled 'New Event' and includes a sidebar with navigation icons. The main content area is titled 'Catalog Event Information' and contains the following fields:

- Category:** A dropdown menu with 'New Luma Yoga Collection' selected.
- Start Date:** A date and time picker showing '04/22/2017 10:01'.
- End Date:** A date and time picker showing '04/23/2017 10:01'.
- Image:** A field with a 'Choose File' button and the text 'No file chosen'.
- Sort Order:** A text input field.
- Display Countdown Ticker On:** A section with two checkboxes: 'Category Page' (checked) and 'Product Page' (unchecked).

At the bottom of the form, there is a 'Save' button and a 'Report Bug' link. The footer of the page includes the copyright notice 'Copyright © 2017 Magento Commerce Inc. All rights reserved.' and the version 'Magento ver. 2.1.2'.

### *Catalog Event Information*

- c. Use the calendar (  ) to choose the **Start Date** of the event. Then, use the **Hour** and **Minute** sliders to set the time the event begins.
  - d. Use the calendar (  ) to choose the **End Date** of the event. Then, use the **Hour** and **Minute** sliders to set the time the event ends.
  - e. To upload an **Image** for the event widget, tap **Choose File**. Then, select the image file from your directory.
  - f. In the **Sort Order** field, enter a number to indicate the sequence in which this event appears when listed with other events.
  - g. Select the checkbox of each page where you want to display the countdown ticker:
    - Category Page
    - Product Page
3. When complete, tap **Save**.

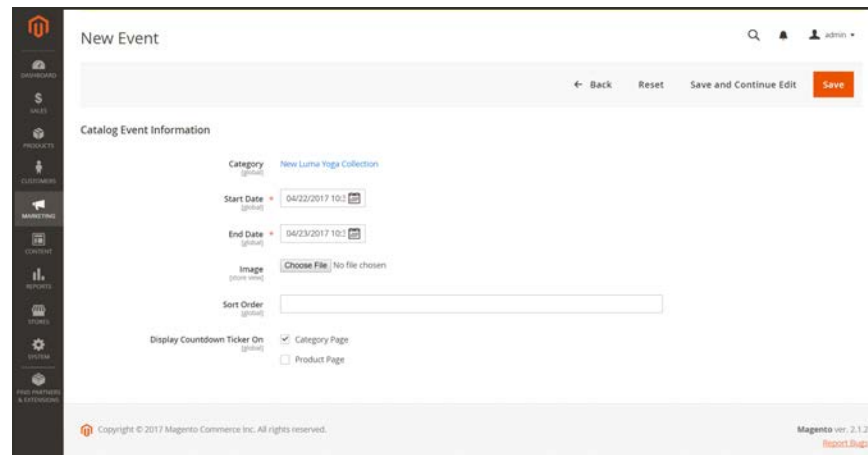
**Field Descriptions**

FIELD	SCOPE	DESCRIPTION
Category	Global	When creating a new event, this field links back to the category tree. When editing an event, it links to the category page related to the event.
Start Date	Global	The starting date and time of the event in MMDDYYYY HH;MM format. Click the calendar button to select the date.
End Date	Global	The ending date and time of the event in MMDDYYYY HH;MM format. Click the calendar button to select the date.
Image	Store View	Uploads an image for the event widget.
Sort Order	Global	Determines the sequence in which this event appears when listed with other events.
Display Countdown Ticker On	Global	Displays the countdown ticker in the header of each page specified. Options include: Category Page / Product Page
Status	Global	Indicates the status of the event based on the Start Date and End Date range. Status is a read-only value. Values include: Open / Closed / Upcoming



## Updating Events

Events can be edited from either the Events page or from the category that is associated with the event. When a category has an associated event, an Edit Event button appears in the upper-right corner.

The screenshot shows the 'New Event' form in the Magento Admin interface. The form is titled 'New Event' and has a search bar, a user profile icon, and a dropdown menu in the top right corner. Below the title, there are buttons for 'Back', 'Reset', 'Save and Continue Edit', and 'Save'. The form is divided into sections: 'Catalog Event Information' and 'Display Countdown Ticker On'. Under 'Catalog Event Information', there are fields for 'Category' (set to 'New Lunar Yoga Collection'), 'Start Date' (04/22/2017 10:00), 'End Date' (04/23/2017 10:00), 'Image' (with a 'Choose File' button and 'No file chosen' text), and 'Sort Order' (a text input field). Under 'Display Countdown Ticker On', there are checkboxes for 'Category Page' (checked) and 'Product Page' (unchecked). The footer of the form shows the copyright notice 'Copyright © 2017 Magento Commerce Inc. All rights reserved.' and the version 'Magento ver. 2.1.2' with a 'Report Bug' link.

### *Edit Event*

#### Method 1: Edit Event from the Events Page

1. On the Admin sidebar, tap **Marketing**. Then under **Private Sales**, choose **Events**.
2. Find the event in the list, and open it in edit mode.
3. Make the necessary changes to the event.
4. When complete, tap **Save**.

#### Method 2: Edit Event from Category

1. On the Admin sidebar, tap **Products**. Then under **Inventory**, choose **Categories**.
2. In the category tree on the left, select the category that is associated with the event. Then in the upper-right corner, tap **Edit Event**.
3. Make the necessary changes to the event.
4. When complete, tap **Save**.

## Invitations

When invitations are enabled, customers can send and view invitations from the dashboard of their customer accounts. The invitation email includes a link to your store's [Customer Login](#) page.

### Invitation Workflow

1

**Customer prepares invitations.** From the account dashboard, the customer prepares the list of recipients, and completes the invitation. A custom message can be included, depending on the configuration.

2

**Customer sends invitations.** When ready, the customer taps the Send Invitations button.

3

**System manages transmission.** The system sends invitations in batches, according to the number set in the configuration.

4

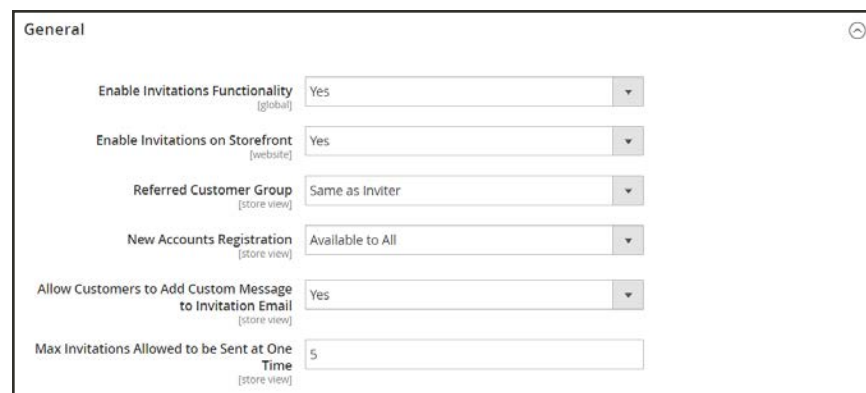
**Customer monitors response.** The customer monitors the status of each invitation from the account dashboard, as having been Sent, Accepted, or Canceled.

## Configuring Invitations

The invitation configuration enables invitations for the store, and determines how they are sent.

### To configure invitations:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Customers**, choose **Invitations**.
3. Expand ☑ the **General** section. Then, do the following:



The screenshot shows the 'General' configuration section for 'Invitations'. It contains six settings, each with a label, a scope indicator in brackets, and a control element (dropdown or text input).

Setting	Scope	Value
Enable Invitations Functionality	[global]	Yes
Enable Invitations on Storefront	[website]	Yes
Referred Customer Group	[store view]	Same as Inviter
New Accounts Registration	[store view]	Available to All
Allow Customers to Add Custom Message to Invitation Email	[store view]	Yes
Max Invitations Allowed to be Sent at One Time	[store view]	5

*General*

- a. Set **Enable Invitations Functionality** to “Yes.”
  - b. To allow customers to manage invitations from the storefront, set **Enable Invitations on Storefront** to “Yes.”
  - c. Set **Referred Customer Group** to one of the following:
    - Same as Inviter
    - Default Customer Group from Configuration
  - d. Set **New Accounts Registration** to one of the following:
    - By Invitation Only
    - Available to All
  - e. To **Allow Customers to Add Custom Message to Invitation Email**, select “Yes.”
  - f. To limit the number of invitations that can be sent at one time, enter the number in the **Max Invitations Allowed to be Sent at One Time** field.
4. Expand ☹ the **Email** section, and do the following:



*Email*

- a. Select the store identity to be used as the **Customer Invitation Email Sender**.
  - b. Select the **Customer Invitation Email Template** used for invitations sent.
5. When complete, tap **Save Config**.

# Communications

## Contents

In this section of the guide, you will learn how to customize email and newsletter templates, as well as PDF invoices and packing slips. You will also learn how to personalize the content with variables and markup tags.

### Email

- Supported Email Clients
- Preparing Your Email Logo
- Configuring Email Templates
  - Sales Email
  - Payment Failed Email
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- Customizing Email Templates
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- Newsletter Templates
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- Adding Predefined Variables
- Creating Custom Variables
- Markup Tags
- Variable Reference



## CHAPTER 28:

# Email

Email templates define the layout, content, and formatting of automated messages sent from your store. They are called **transactional emails**<sup>1</sup> because each one is associated with a specific type of transaction, or event.

Magento includes a set of responsive email templates that are triggered by a variety of events that take place during the operation of your store. Each template is optimized for any screen size, and can be viewed from the desktop, as well as on tablets and mobile devices. You will find a variety of prepared email templates related to customer activities, sales, product alerts, admin actions, and system messages that you can customize to reflect your brand.

---

<sup>1</sup>An automated email message that is sent in response to a specific event or transaction.

## Supported Email Clients

A wide range of technologies is supported by the various email clients and services available today. Although there is some variation in the way email messages are rendered, we have found the following services to be compatible with Magento Commerce.

### Desktop Clients

OPERATING SYSTEM	CLIENTS SUPPORTED
OS X 10.8	Apple Mail 6
OS X 10.7	Outlook 2011 Outlook 2013
Windows 8	Outlook 2010
Windows 7	Outlook 2007 Outlook 2003

### Mobile Clients

OPERATING SYSTEM	CLIENTS SUPPORTED
Android 4.2, “Jelly Bean”	Native email app
Android 2.3, “Gingerbread”	Native email app
Gmail App (Android 4.2)	Native email app
Blackberry 5 OS	Native email app
IOS 8	iPhone 6 iPhone 6 Plus
IOS 7	iPad (Retina) iPad Mini iPhone 5s
<b>Mail on these devices:</b>	
IOS 6	iPhone 5 iPhone 4s



**Web Clients**

EMAIL APPLICATION	BROWSERS SUPPORTED*
AOL Mail	Chrome Internet Explorer Firefox
Gmail	Chrome Internet Explorer Firefox
Yahoo! Mail	Chrome Internet Explorer Firefox
Outlook.com	Chrome Internet Explorer

\* The latest version of each browser was used for testing.

# Preparing Your Email Logo

Logos can be saved as any of the following file types. Logos with transparent backgrounds can be saved as either .GIF or .PNG files.

- JPG/JPEG
- GIF
- PNG

To ensure that your logo renders well on high-resolution devices, the uploaded image should be three times the size of the dimensions that are specified in the header template. Typically, original logo artwork is created as a vector image, so it can be scaled up without losing resolution. The image can then be saved in one of the supported bitmap image formats.



*Logo Three Times Display Size*

To take advantage of the limited vertical space in the header, make sure to crop the image to eliminate any wasted space at the top or bottom. When editing the image, be careful to preserve the **aspect ratio**<sup>1</sup> of the logo, so the height and width resize proportionally.

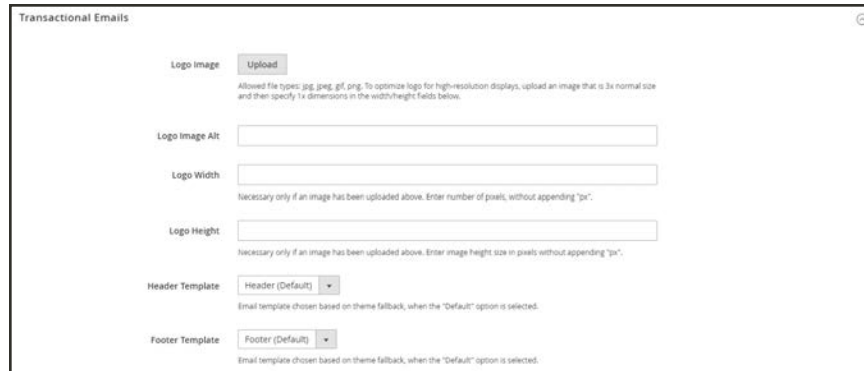
As a general rule, you can make an image smaller than the original, but not larger without losing resolution. Taking a small image and scaling it up in a photo editor lowers the resolution of the image. For example, if the display dimensions of the logo are 168 pixels wide by 48 pixels high in the header template, the uploaded image should be 504 pixels wide by 144 pixels high.

LOGO DIMENSIONS	1 X (DISPLAY SIZE)	3 X (IMAGE SIZE)
Width:	168 px	504 px
Height:	48 px	144 px

<sup>1</sup>The proportional relationship between the width and height of an image.

## Configuring Email Templates

The configuration determines the logo, as well as the header and footer templates that are used for all transactional email messages that are sent from your store.



The screenshot shows the 'Transactional Emails' configuration page. It includes an 'Upload' button for the logo, followed by input fields for 'Logo Image Alt', 'Logo Width', and 'Logo Height'. Below these are dropdown menus for 'Header Template' and 'Footer Template', both currently set to 'Default'. Small text provides instructions for each field.

Transactional Emails

Logo Image

Allowed file types: jpg, jpeg, gif, png. To optimize logo for high-resolution displays, upload an image that is 3x normal size and then specify 1x dimensions in the width/height fields below.

Logo Image Alt:

Logo Width:

Necessary only if an image has been uploaded above. Enter number of pixels, without appending "px".

Logo Height:

Necessary only if an image has been uploaded above. Enter image height size in pixels without appending "px".

Header Template:

Email template chosen based on theme fallback, when the "Default" option is selected.

Footer Template:

Email template chosen based on theme fallback, when the "Default" option is selected.

### *Transactional Emails*

#### Process Overview:

Step 1: Upload Your Logo

Step 2: Select the Header and Footer Templates

### Step 1: Upload Your Logo

1. On the Admin sidebar, tap **Content**. Then under **Design**, choose **Configuration**.
2. Find the store view that you want to configure. Then in the **Action** column, click **Edit**.
3. Under **Other Settings**, expand ☺ the **Transactional Emails** section. Then, do the following:
  - a. To upload your prepared **Logo Image**, tap **Upload**. Find the file on your computer, and select the file.
  - b. In the **Logo Image Alt** field, enter alternate text to identify the image.
  - c. Enter the **Logo Width** and **Logo Height** in pixels. Enter each value as a number, without the “px” abbreviation. These values refer to the display dimensions of the logo in the header, and not to the actual size of the image.

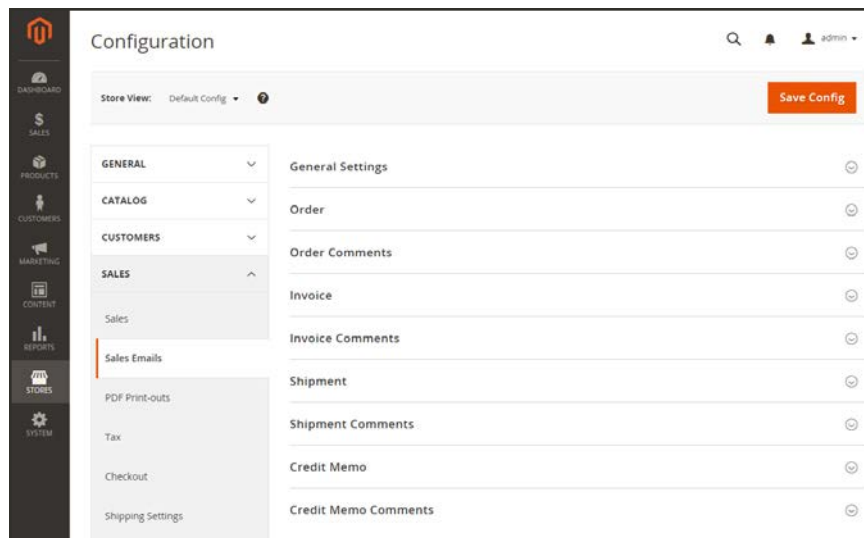
### Step 2: Choose the Header and Footer Templates

If you have custom header and footer templates for your store, or for different stores, you can specify which templates are used for each, according to the **scope** of the configuration.

1. Choose the **Header Template** to be used for all transactional email messages.
2. Choose the **Footer Template** to be used for all transactional email messages.
3. When complete, tap **Save Config**.

## Sales Email

A number of email messages are triggered by the events related to an order, and the configuration is similar. You must identify the store contact that appears as the sender of the message, the email template to be used, and anyone else who is to receive a copy of the message. Sales emails can be sent when triggered by an event, or by predetermined interval.



### *Sales Emails*

#### Step 1: Update the Email Templates

Make sure that you have updated each **email template** to reflect your brand. For a complete list of templates, see: [Email Template List](#).

#### Step 2: Choose the Type of Transmission

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Sales Emails**.
3. Expand ☑ the **General Settings** section. Then, set **Asynchronous Sending** to one of the following:

Disable	Sends sales email when triggered by an event.
Enable	Sends sales email at predetermined, regular intervals.

General Settings

Asynchronous sending

Disable

[GLOBAL]

General Settings

Step 3: Complete the Details for Each Sales Email Message

4. Expand  the **Order** section. Then, do the following:

Order

Enabled

Yes

☒ Use system value

New Order Confirmation Email Sender

Sales Representative

☒ Use system value

New Order Confirmation Template

New Order (Default)

Email template chosen based on theme fallback when "Default" option is selected.

☒ Use system value

New Order Confirmation Template for Guest

New Order for Guest (Default)

Email template chosen based on theme fallback when "Default" option is selected.

☒ Use system value

Send Order Email Copy To

Comma-separated

Send Order Email Copy Method

Bcc

☒ Use system value

Order

- a. Verify that **Enabled** is set to “Yes.”
- b. Set **New Order Confirmation Email** to the store contact that appears as the sender of the message.
- c. Set **New Order Confirmation Template** to the template that is used for the email that is sent to registered customers.
- d. Set **New Order Confirmation Template for Guest** to the template that is used for the email that is sent to guests who do not have an account with your store.
- e. In the **Send Order Email Copy To** field, enter the email address of anyone who is to receive a copy of the new order email. If sending a copy to multiple recipients, separate each address with a comma.
- f. Set **Send Order Email Copy Method** to one of the following:

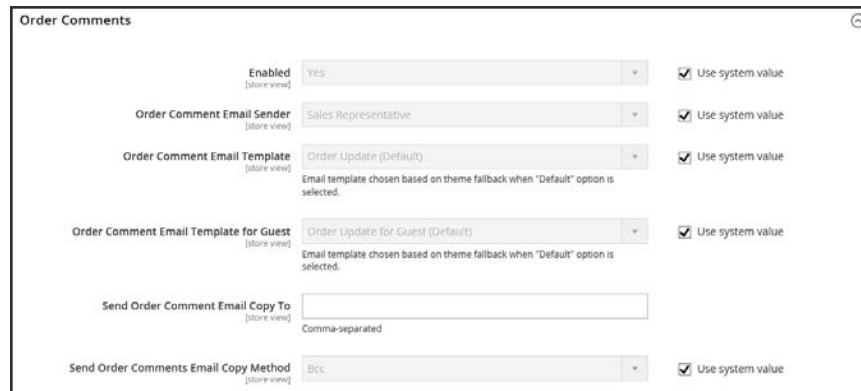
Bcc

Sends a “blind courtesy copy” by including the recipient in the header of the same email that is sent to the customer. The BCC recipient is not visible to the customer.

Separate Email

Sends the copy as a separate email.

5. Expand  the **Order Comments** section, and repeat these steps.



**Order Comments**

**Enabled** (store view) Yes ☒ Use system value

**Order Comment Email Sender** (store view) Sales Representative ☒ Use system value

**Order Comment Email Template** (store view) Order Update (Default) ☒ Use system value  
Email template chosen based on theme fallback when "Default" option is selected.

**Order Comment Email Template for Guest** (store view) Order Update for Guest (Default) ☒ Use system value  
Email template chosen based on theme fallback when "Default" option is selected.

**Send Order Comment Email Copy To** (store view)   
Comma-separated

**Send Order Comments Email Copy Method** (store view) Bcc ☒ Use system value

### *Order Comments*

6. Complete the configuration for the remaining sales emails:
- Invoice
  - Shipment
  - Credit Memo
7. When complete, tap **Save Config**.

## Payment Failed Email

A notification is sent to the customer if the payment method that is chosen during checkout fails to complete the transaction.

**Payment Failed Emails**

**Payment Failed Email Sender** (store view): General Contact ☒ Use system value

**Payment Failed Email Receiver** (store view): General Contact ☒ Use system value

**Payment Failed Template** (store view): Payment Failed (Default) ☒ Use system value  
Email template chosen based on theme fallback when "Default" option is selected.

**Send Payment Failed Email Copy To** (store view):   
Separate by ","

**Send Payment Failed Email Copy Method** (store view): Bcc

### *Payment Failed Emails*

#### Step 1: Update the Email Templates

Make sure that you have updated each **email template** to reflect your brand. For a complete list of templates, see: [Email Template List](#).

#### Step 2: Configure the Payment Failed Emails

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Checkout**.
3. Expand ☑ the **Payment Failed Emails** section. Then, do the following:
  - a. Set **Payment Failed Email Sender** to the store contact that appears as the sender of the message.
  - b. Set **Payment Failed Email Receiver** to the store contact that is to receive notification of failed email transmissions.
  - c. Set **Payment Failed Template** to the template that is used for the email that is sent when the payment method fails during checkout.
  - d. In the **Send Payment Failed Email Copy To** field, enter the email address of anyone who is to receive a copy of the payment failed notification. If sending a copy to multiple recipients, separate each address with a comma.



- e. Send **Payment Failed Copy Method** to one of the following:

Bcc	Sends a “blind courtesy copy” by including the recipient in the header of the same email that is sent to the customer. The BCC recipient is not visible to the customer.
Separate Email	Sends the copy as a separate email.

4. When complete, tap **Save Config.**

## Admin User Email

The Admin email template configuration determines the email templates that are sent when users forget and reset their passwords, the store contact that appears as the sender of the message, and how long the password recovery link remains valid.

*Admin User Emails*

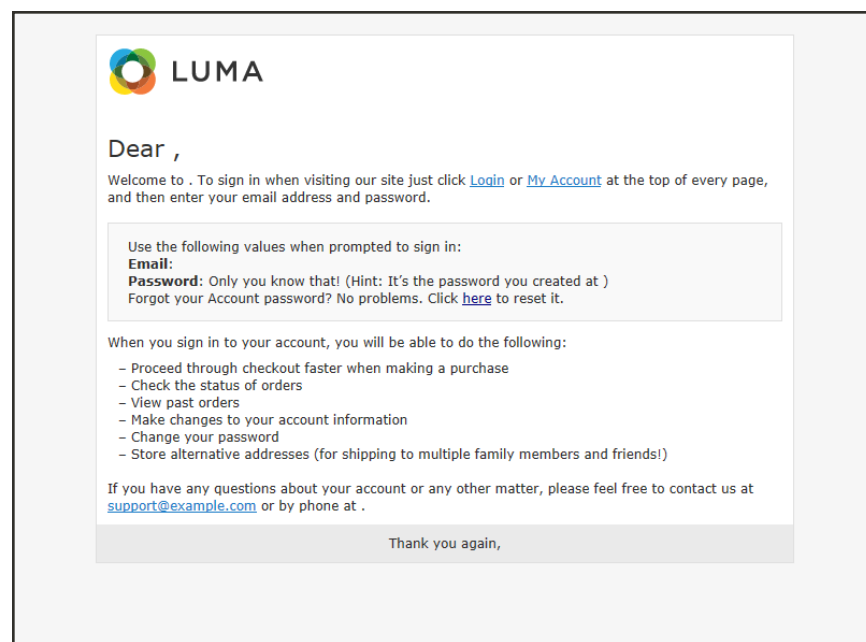
### To configure the Admin email templates:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **Admin**.
3. Expand ☺ the **Admin User Emails** section. Then, do the following:
  - a. Set **Forgot Password Email Template** to the template that is sent when Admin users forget their passwords.
  - b. Set **Forgot and Reset Email Sender** to the store contact that appears as the sender of the message.
  - c. Set **User Notification Template** to the email template that is used as the default for admin notifications.
4. When complete, tap **Save Config.**

## Customizing Email Templates

Magento includes a default email template for the body section of each message that is sent by the system. The template for the body content is combined with the header and footer templates to create the complete message. The content is formatted with HTML and CSS, and can be easily edited, and customized by adding **variables** and **frontend apps**. Email templates can be customized for each website, store, or store view. Make sure to update the system configuration after creating a customized template, so the custom template is used instead of the default.

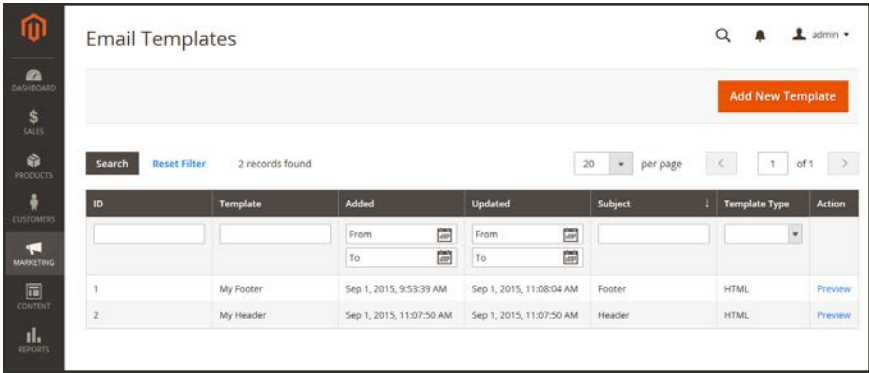
The default templates include your logo and store information, and can be used without further customization. However as a best practice, you should view each template, and make any necessary changes before they are sent to customers.



*Preview of Welcome Template*

# Header Template

The email header template includes your logo that is linked to your store. In addition, you can easily insert variables to add store contact information to the header.



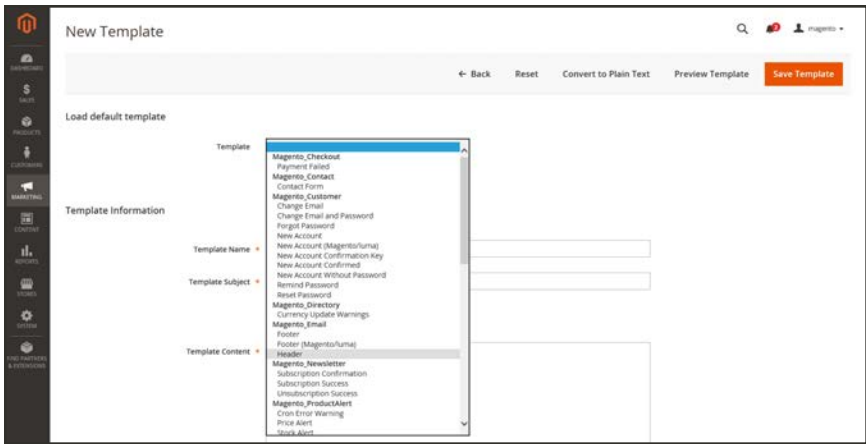
Email Templates

**Process Overview:**

- Step 1: Load the Template
- Step 2: Customize and Preview the Template
- Step 3: Update the Configuration

**Step 1: Load the Default Template**

- 1. On the Admin sidebar, tap **Marketing**. Then under **Communications**, choose **Email Templates**.
- 2. Tap **Add New Template**. Then, do the following:
  - a. Under **Load default template**, in the **Template** list under **Magento\_Email**, choose “Header.”



Default Header Template

- b. Tap **Load Template**.

The HTML code and variables from the template appear in the form.

## Step 2: Customize the Template

1. Under **Template Information**, do the following:
  - a. Enter the **Template Name** for your custom header.
  - b. Enter a **Template Subject** to help organize the templates. In the grid, the list of templates can be sorted and filtered by the Subject column.

Template Information

Template Name \*

Template Subject \* {{trans "Header"}}

Insert Variable...

Template Content \*

```
<!DOCTYPE html PUBLIC "-//W3C//DTD XHTML 1.0 Strict//EN" "http://www.w3.org/TR/xhtml1/DTD/xhtml1-strict.dtd">
<html xmlns="http://www.w3.org/1999/xhtml">
<head>
<meta http-equiv="Content-Type" content="text/html; charset=utf-8" />
<meta name="viewport" content="initial-scale=1.0, width=device-width" />
<meta http-equiv="X-UA-Compatible" content="IE=edge" />
<style type="text/css">
{{var template_styles|raw}}
</style>
</head>
<body>
{{inlinecss file="css/email-inline.css"}}
<!-- Begin wrapper table -->
<table class="wrapper" width="100%">
<tr>
<td class="wrapper-inner" align="center">
```

Template Styles

*Header Template Information*

- c. In the **Template Content** box, modify the HTML as needed.

When working in the template code, be careful not to overwrite anything that is enclosed in double braces.

- d. To insert a variable, position the cursor in the code where you want the variable to appear, and tap **Insert Variable**. Then, choose the variable that you want to insert.

When a variable is selected, a **markup tag** for the variable is inserted in the code.



*Insert Variable*

Although the Store Contact variables are the ones most often included in the header, you can enter the code for any system or **custom variable** directly into the template.

- e. If you need to make any CSS declarations, enter the styles in the **Template Styles** box.
2. When you are ready to review your work, tap **Preview Template**. Then, make adjustments to the template as needed.
3. When complete, tap **Save Template**.

Your custom header now appears in the list of available Email templates.

### Step 3: Update the Configuration

1. On the Admin sidebar, tap **Content**. Then under **Design**, choose **Configuration**.
2. In the grid, find the store view that you want to configure. Then in the **Action** column, click **Edit**.
3. Scroll down and expand ☑ the **Transactional Emails** section.
4. Choose the **Header Template** that is used as the default for email notifications.
5. When complete, tap **Save Config**.

Transactional Emails

Logo image

Upload

Allowed file types: jpg, jpeg, gif, png. To optimize logo for high-resolution displays, upload an image that is 3x normal size and then specify its dimensions in the width/height fields below.

Logo image Alt

Logo Width

necessary only if an image has been uploaded above. Enter number of pixels, without appending "px".

Logo Height

necessary only if an image has been uploaded above. Enter image height size in pixels without appending "px".

Header Template

Header (Default)

Email template chosen based on theme fallback, when the "Default" option is selected.

Footer Template

Footer (Default)

Email template chosen based on theme fallback, when the "Default" option is selected.

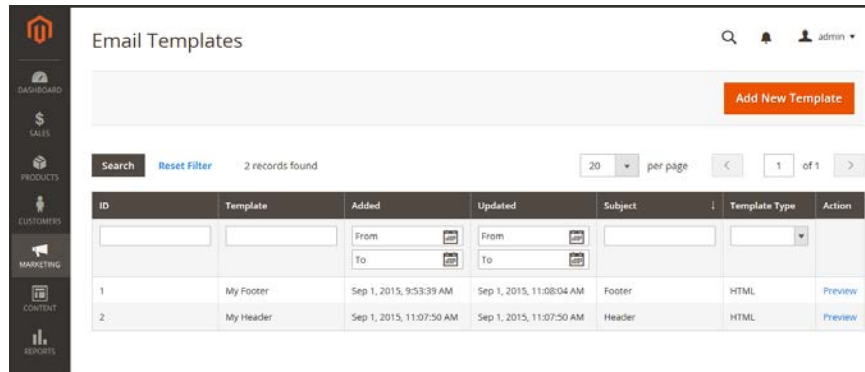
Transactional Emails

Field Descriptions

FIELD	DESCRIPTION
LOAD DEFAULT TEMPLATE	
Template	Lists the selection of available templates, and identifies the template to be customized.
TEMPLATE INFORMATION	
Template Name	The name of your custom template.
<div>Insert Variable</div>	Inserts a Store Contact Information variable into the template at the cursor location.
Template Subject	The Template Subject appears in the Subject column, and can be used to sort and filter the templates in the list.
Template Content	The content of the template in HTML.
Template Styles	Any CSS style declarations that are needed to format the template header can be entered in the Template Styles box.

## Footer Template

The email template footer contains the closing and signature line of the email message. You can change the closing to fit your style, and add additional information, such as the company name and address below your name.



*Email Templates*

### Process Overview:

- Step 1: [Load the Default Template](#)
- Step 2: [Customize and Preview the Template](#)
- Step 3: [Update the Configuration](#)

### Step 1: Load the Default Template

1. On the Admin sidebar, tap **Marketing**. Then under **Communications**, choose **Email Templates**.
2. Tap **Add New Template**. Then, do the following:
  - a. Under **Load default template**, in the **Template** list under **Magento\_Email**, choose “Footer.”
  - b. Tap **Load Template**.



*Default Footer Template*

### Step 2: Customize and Preview the Template

1. Enter the **Template Name** for your custom footer.
2. Enter a **Template Subject** to help organize the templates. In the grid, the templates can be sorted and filtered by the Subject column.

Template Information

Template Name \*

Template Subject \* {{trans "Footer"}}

Insert Variable...

Template Content \*

```
<!-- End Content -->
</td>
</tr>
<tr>
<td class="footer">
<p class="closing">{{trans "Thank you, %store_name%"
store_name=$store.getFrontendName()}}</p>
</td>
</tr>
</table>
</tr>
</table>
<!-- End wrapper table -->
</body>
```

Template Styles

*Footer Template Information*

3. In the **Template Content** box, modify the HTML as needed.

When working in the template code, be careful not to overwrite anything that is enclosed in double braces.

4. To insert a variable, position the cursor in the code where you want the variable to appear, and tap **Insert Variable**. Then, choose the variable that you want to insert.

When a variable is selected, a **markup tag** for the variable is inserted in the code.

Insert Variable...

Store Contact Information

- Base Unsecure URL
- Base Secure URL
- General Contact Name
- General Contact Email
- Sales Representative Contact Name
- Sales Representative Contact Email
- Custom1 Contact Name
- Custom1 Contact Email
- Custom2 Contact Name
- Custom2 Contact Email
- Store Name
- Store Phone Number
- Store Hours
- Country
- Region/State
- Zip/Postal Code
- City
- Street Address 1
- Street Address 2

Template Variables

- Store Name


*Insert Variable*

Although the Store Contact variables are the ones most often included in the footer, you can enter the code for any system or **custom variable** directly into the template.

5. If you need to make any CSS declarations, enter the styles in the **Template Styles** box.



Step 3: Update the Configuration

- 1. On the Admin sidebar, tap **Content**. Then under **Design**, choose **Configuration**.
- 2. In the grid, find the store view that you want to configure. Then in the **Action** column, click **Edit**.
- 3. Scroll down and expand  the **Transactional Emails** section.
- 4. Choose the **Footer Template** that is used as the default for email notifications.
- 5. When complete, tap **Save Config**.

Transactional Emails

Logo image

Upload

Allowed file types: jpg, png, gif, png. To optimize logo for high-resolution displays, upload an image that is 3x normal size and then specify 1x dimensions in the width/height fields below.

Logo Image Alt

Logo Width

Necessary only if an image has been uploaded above. Enter number of pixels, without appending "px".

Logo Height

Necessary only if an image has been uploaded above. Enter image height size in pixels without appending "px".

Header Template

Header (Default)

Email template chosen based on theme fallback, when the "Default" option is selected.

Footer Template

Footer (Default)

Email template chosen based on theme fallback, when the "Default" option is selected.

Transactional Emails

Field Descriptions

FIELD	DESCRIPTION
LOAD DEFAULT TEMPLATE	
Template	Lists the selection of available templates, and identifies the template to be customized.
TEMPLATE INFORMATION	
Template Name	The name of your custom template.
<div>Insert Variable</div>	Inserts a Store Contact Information variable into the template at the cursor location.
Template Subject	The Template Subject appears in the Subject column, and can be used to sort and filter the templates in the list.
Template Content	The content of the template in HTML.

**Field Descriptions (cont.)**

FIELD	DESCRIPTION
Template Styles	Any CSS style declarations that are needed to format the template footer can be entered in the Template Styles box.

## Message Templates

The process of customizing the body of each message is the same as the customizing the header or footer. The only difference is that there is a different message template for each activity or event that triggers a notification. You can use the templates as they are, or customize them to match your voice and brand. In addition to the template text, there's a wide selection of **variables** that can be incorporated into the template.

### Process Overview:

Step 1: **Load the Default Template**

Step 2: **Customize the Template**

Step 4: **Update the Configuration**

Step 5: **Preview and Save**

### Step 1: Load the Default Template

1. On the Admin sidebar, tap **Marketing**. Then under **Communications**, choose **Email Templates**.
2. Tap **Add New Template**. Then, do the following:
  - a. Under **Load default template**, in the **Template** list, choose the template that you want to customize.
  - b. Tap **Load Template**.



*Default Message Template*

### Step 2: Customize the Template

1. In the **Template Name** field, enter a name for your custom template.
2. By default, the **Template Subject** contains the first line of the message, which is the salutation. You can leave it as is, or enter something more descriptive.
3. Take note of the **Currently Used For** path to the template configuration. You will later follow this path to update the configuration.

### Message Template Information

4. In the **Template Content** box, modify the HTML as needed. The content consists of a combination of HTML tags, CSS directives, variables, and text.

When working in the template code, be careful not to accidentally type over the code that is enclosed in double braces.

### Template Message Content

5. To insert a variable, position the cursor in the code where you want the variable to appear, and tap **Insert Variable**. Then, choose the variable that you want to insert.

When a variable is selected, a **markup tag** for the variable is inserted in the code.

### Insert Variable

In addition to the Store Contact variables, the list includes the Customer Account URL, Customer Email, and Customer Name. However, you are not limited to the variables in this list. You can enter the code for any system or **custom variable** directly into the template.

6. If you need to make any CSS declarations, enter the styles in the **Template Styles** box.

Step 3: Update the Configuration

- 1. In the breadcrumb trail at the top of the Template Information section, find the following information, as it relates to your template. In this example the template configuration is located on the Customer Configuration page, in the Create New Account Options section, and in the Default Welcome Email field.

Page	Customer Configuration
Section	Create New Account Options
Field	Default Welcome Email

- 2. Tap the link to open the template configuration page.



- 3. Expand the section. Then, find the field for the email template that you customized, and specify the new template as the default.



Welcome Email Configuration

Step 4: Preview and Save the Template

- 1. When you are ready to review your work, tap **Preview Template**. Then, make adjustments to the template as needed.
- 2. When complete, tap **Save Template**.

Your custom template is now available in the list of Email templates.



Field Descriptions

FIELD	DESCRIPTION
LOAD DEFAULT TEMPLATE	

**Field Descriptions (cont.)**

FIELD	DESCRIPTION
Template	Lists the selection of available templates, and identifies the template to be customized.

**TEMPLATE INFORMATION**

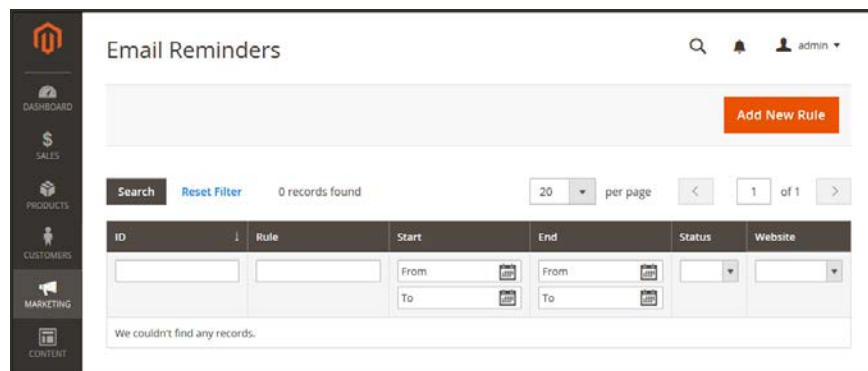
Template Name	The name of your custom template.
<div>Insert Variable</div>	Inserts a variable into the template at the cursor location.
Template Subject	The Template Subject appears in the Subject column, and can be used to sort and filter the templates in the list.
Template Content	The content of the template in HTML.
Template Styles	Any CSS style declarations that are needed to format the template can be entered in the Template Styles box.

## CHAPTER 29:

# Email Reminders

The purpose of an email reminder is encourage people who have visited your store to take advantage of a promotion and make a purchase. Email reminders can be automatically sent to customers when a specific set of conditions is met. For example, you might send a reminder to customers who have added something to their cart or wishlist, but have not yet made a purchase. You can use email reminders to encourage customers to return to your store, and include a **coupon code** as an incentive. Coupon codes can be automatically generated for each batch of email reminders, to give you control over the offers that are associated with each batch.

Email reminders can be triggered after a certain number of days have passed since a cart was abandoned, or for any other condition you want to define, such as total cart value, quantity, items in cart, and so on.



*Email Reminders*

## Creating Email Reminders

Before setting up an email reminder rule, you must first set up a cart price rule to define the promotion that is being offered. Rule conditions that trigger an email reminder can be based on cart properties, wishlist properties, or both.

Email reminders might promote a cart price rule with, or without, a coupon. A cart price rule that defines an auto-generated coupon generates a random coupon code for each customer.

### To create an email reminder:

1. On the Admin sidebar, tap **Marketing**. Then under **Communications**, choose **Email Reminder Rules**.
2. In the upper-right corner, tap **Add New Rule**.
3. Complete the Rule Information, as follows:

### Rule Information

- a. Enter a **Rule Name** to identify the rule internally.
- b. Enter a brief **Description** of the rule.
- c. To choose the **Cart Price Rule** promotion that this reminder is to advertise, tap **Select Rule...** Then, select the rule.



Select Rule...

Search [Reset Filter](#) 4 records found 20 per page 1 of 1

ID	Rule	Coupon Code	Start	End	Status
			From To	From To	
1	Buy 3 tee shirts and get the 4th free		Oct 25, 2016	...	Active
2	Spend \$50 or more - shipping is free!			...	Active
3	20% OFF Ever \$200-plus purchase!			...	Active
4	\$4 Luma water bottle (save 70%)	H20		...	Active

*Select Cart Rule*

- d. If you want the rule to go into effect immediately, set **Status** to “Active.”
- e. To set up a date range for the rule to be active, enter the **From** and **To** dates. You can also choose the date from the Calendar ( ).
- f. To send the reminder more than once, enter the number of days before the next email blast in the **Repeat Schedule** field.

To repeat the reminder multiple times, separate the number of days with a comma. For example, enter “7” to trigger the rule again in seven days; enter “7,14” to trigger the rule in seven days, and again fourteen days later.

4. In the panel on the left, choose **Conditions**. At least one condition must be defined for the rule. The process is similar to building a [catalog price rule](#).

New Reminder Rule

← Back Reset Save and Continue Edit Save

**EMAIL REMINDER RULE**

Rule Information

**Conditions**

Emails and Labels

**Conditions**

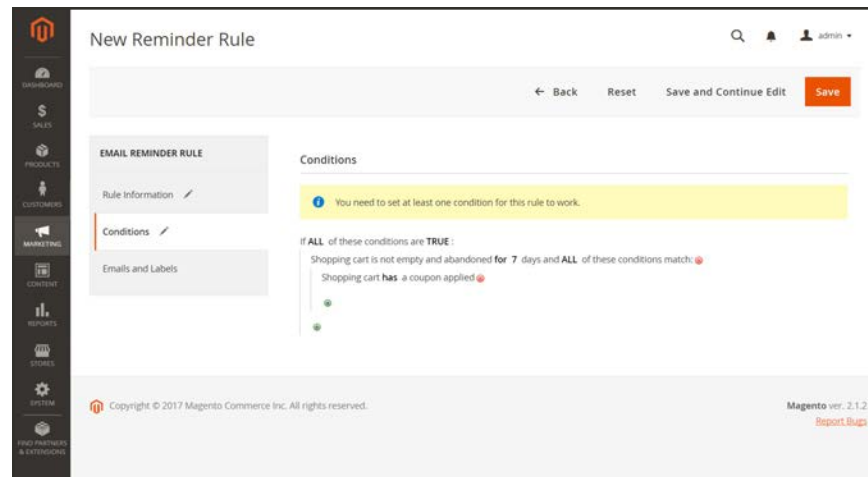
You need to set at least one condition for this rule to work.

If ALL of these conditions are TRUE:

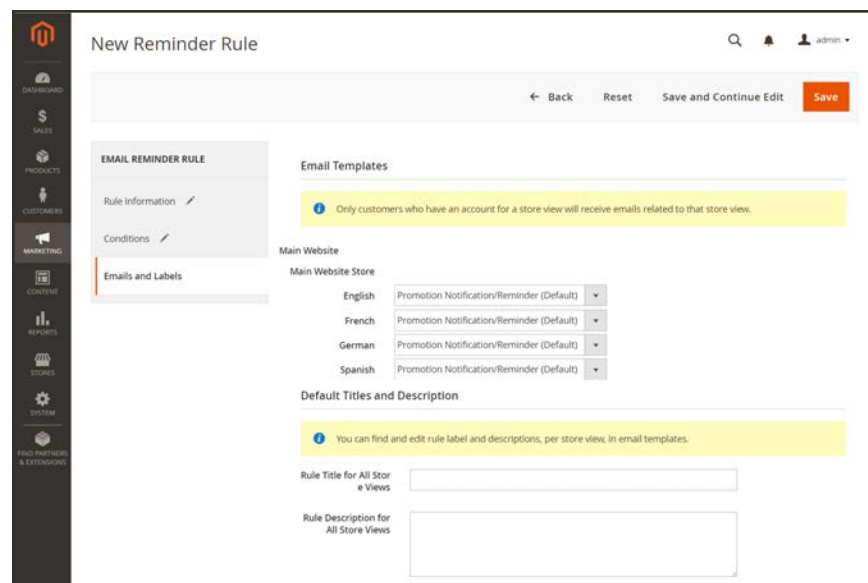
Copyright © 2017 Magento Commerce Inc. All rights reserved. Magento ver. 2.1.2 Report Bugs

*Conditions*

- a. Tap **Add** ( ) to display the list of options. Then, choose one of the following conditions:
  - Wish List
  - Shopping Cart
- b. Complete the condition to describe the scenario that triggers the email reminder.

*Completed Condition*

5. In the panel on the left, choose **Emails and Labels**

*Email and Labels*

6. In the Email Templates section, choose the email template to be used for each website and store view in your **store hierarchy**.

If you don't want to send the reminder email to customers of a store view, leave the value "Not Selected."

7. In the Default Titles and Description section, do the following:

- a. Enter the **Rule Title for All Store Views**.

This value can be incorporated into email templates by using the `promotion_name` variable.

- b.** Enter the **Rule Description for All Store Views**.

### Default Titles and Description

**i** You can find and edit rule label and descriptions, per store view, in email templates.

Rule Title for All Store Views

Rule Description for All Store Views

*Default Titles and Description*

- c.** In the Titles and Descriptions Per Store View section, enter the Rule Title and Description for the **Default Store View**. For multiple store views, enter the appropriate title and description for each.

The description can be incorporated into email templates by using the `promotion_description` variable.

### Titles and Descriptions Per Store View

**i** Overrides default titles and descriptions. Note that if an email template is not specified for this store view, the respective variable values will be deleted.

Main Website	
Main Website Store	
English	<input type="text"/>
	<input type="text"/>
French	<input type="text"/>
	<input type="text"/>
German	<input type="text"/>
	<input type="text"/>
Spanish	<input type="text"/>
	<input type="text"/>

*Titles and Description per Store View*

- 8.** When complete, tap **Save**.



## Trigger Conditions

SOURCE	TRIGGER
Wish List	Number of days abandoned
	Sharing
	Number of items
	Specific items
Shopping Cart	Number of days abandoned
	Specific coupon code applied
	Line items quantity
	Items quantity
	Total
	Virtual items
	Specific Items

## Field Descriptions

FIELD	DESCRIPTION
<b>RULE INFORMATION</b>	
Rule Name	The name of the automated reminder rule identifies the rule internally.
Description	A description of the rule for internal reference.
Shopping Cart Price Rule	The shopping cart rule that is associated with this email reminder. Reminder emails can promote a shopping cart price rule with or without coupon. If a shopping cart price rule includes an auto-generated coupon, the reminder rule will generate a random, unique coupon code for each customer.
Assigned to Website	The websites to receive automated reminder emails based on this rule.
Status	Activates the rule. If status is inactive, then all other settings are ignored, and the rule is not triggered. Options: Active / Inactive
From Date	The starting date for this automated reminder rule. If no date is specified, the rule becomes active immediately.
To Date	The ending date for this automated reminder rule. If no date is specified, the rule becomes active indefinitely.

**Field Descriptions (cont.)**

FIELD	DESCRIPTION
Repeat Schedule	<p>The number of days before the rule is triggered, and the reminder email sent again, provided the conditions are met.</p> <p>To trigger the rule more than once, enter the number of days before the next email blast, separated by a comma. For example, enter “7” to have the rule triggered again seven days later; enter “7, 14” to have the rule triggered in seven days, and again fourteen days later.</p>

**EMAIL AND LABELS**

Email Templates	Determines the email template to be used for each store view.
Rule Title for All Store Views	Determines the title of the rule for each store view.
Rule Description for All Store Views	Determines the description of the rule for each store view.

## Configuring Email Reminders

Email reminder rules can be configured to be sent at regular intervals by the minute, hour, or day. The configuration determines how many emails are sent in a batch, and the store identity that appears as the sender of the message.

### To configure email reminders:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under Customers, choose **Promotions**.
3. Expand ☯ the **Automated Email Reminder Rules** section. Then, do the following:

The screenshot shows the 'Automated Email Reminder Rules' configuration panel. It includes the following fields and settings:

- Enable Reminder Emails** (global): Set to 'Yes'.
- Frequency** (global): Set to 'Minute Intervals'.
- Interval** (global): Set to '15 minutes'. A note below states: 'Set this value equal or greater to your Magento cron job launch period.'
- Start Time** (global): Set to '00 : 00 : 00'.
- Maximum Emails per One Run** (global): Set to '100'.
- Email Send Failure Threshold** (global): Set to '1'. A note below states: 'Make sure to enter a limit value, or reminder emails will be re-issued to customers in a loop.'
- Reminder Email Sender** (store view): Set to 'General Contact'.

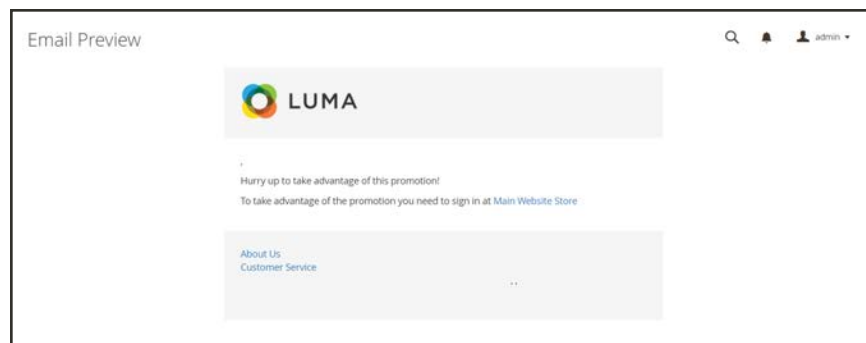
*Automated Email Reminder Rules*

- a. Set **Enable Reminder Emails** to “Yes.”
- b. To set how often Magento checks for new customers who qualify automated email reminders, set **Frequency** to one of the following:
  - Minute Intervals
  - Hourly
  - Daily
- c. Set the appropriate **Interval**, based on the Frequency setting.
- d. Set **Start Time** to the hour, minute, and second the email is sent, based on a 24-hour clock.
- e. To limit the number of emails that can be sent in a batch, enter the number in the **Maximum Emails per One Run** field.
- f. To avoid repeated attempts to send failed email, enter the maximum number of attempts in the **Email Send Failure Threshold** field.

- g.** Set **Reminder Email Sender** to the **store contact** that appears as the sender of the reminder email.
- 4.** When complete, tap **Save Config.**

## Email Reminder Templates

The default email reminder template can be customized, and additional templates created for different promotions. Email reminders have a selection of specific variables that can be incorporated into the message. The information in these variables is determined by the email reminder rule that you set up, and by the **cart price rule** that is associated with the coupon. The Insert Variable button can be used to insert the markup tag with the variable into the template. To learn more, see [Email Templates](#).



### Preview of Promotion Reminder

### To customize an email reminder template:

1. On the Admin sidebar, tap **Marketing**. Then under **Communications**, choose **Email Templates**.
2. Tap **Add New Template**. Then, do the following:
  - a. In the **Template** list under Magento\_Reminder, choose the **Promotion Notification/Reminder** template.
  - b. Tap **Load Template**.
3. Follow the standard **instructions** to customize the template.



**Email Reminder Variables**

VARIABLE	MARKUP TAG
Coupon Code	<code>{{var coupon.getCode() escape}}</code>
Coupon Usage Limit	<code>{{var coupon.getUsageLimit() escape}}</code>
Coupon Usage Per Customer	<code>{{var coupon.getUsagePerCustomer() escape}}</code>
Customer Account URL	<code>{{store url="customer/account/"}}</code>
Customer Name	<code>{{var customer.getName() escape}}</code>
Email Footer Template	<code>{{template config_path="design/email/footer_template"}}</code>
Email Header Template	<code>{{template config_path="design/email/header_template"}}</code>
Email Logo Image Alt	<code>{{var logo_alt}}</code>
Email Logo Image URL	<code>{{var logo_url}}</code>
Promotion Description	<code>{{var promotion_description escape nl2br}}</code>
Promotion Name	<code>{{var promotion_name escape}}</code>
Store Name	<code>{{var store.getFrontendName()}}</code>
Store URL	<code>{{store url=""}}</code>

## Email Template List

The list of email templates is organized alphabetically by Magento module.

### Email Templates

TEMPLATE	CONFIGURATION PATH	
Magento_Checkout		
Payment Failed	Page:	Sales > Checkout
	Section:	Payment Failed Emails
	Field:	Payment Failed Template
Magento_Contact		
Contact Form	Page:	General > Contacts
	Section:	Email Options
	Field:	Email Template
Magento_Customer		
Change Email	n/a	
Change Email and Password	n/a	
Forgot Password	Page:	Customers > Customer Configuration
	Section:	Password Options
	Field:	Forgot Email Template
New Account	Page:	Customers > Customer Configuration
	Section:	Create New Account Options
	Field:	Default Welcome Email
New Account (Magento/luma)	Page:	Customers > Customer Configuration
	Section:	Create New Account Options
	Field:	Default Welcome Email

**Email Templates (cont.)**

TEMPLATE	CONFIGURATION PATH	
New Account Confirmation Key	Page:	Customers > <a href="#">Customer Configuration</a>
	Section:	Create New Account Options
	Field:	Confirmation Link Email
New Account Confirmed	Page:	Customers > <a href="#">Customer Configuration</a>
	Section:	Create New Account Options
	Field:	Welcome Email
New Account Without Password	Page:	Customers > <a href="#">Customer Configuration</a>
	Section:	Create New Account Options
	Field:	Default Welcome Email Without Password
Remind Password	Page:	Customers > <a href="#">Customer Configuration</a>
	Section:	Password Options
	Field:	Remind Email Template
Reset Password	Page:	Customers > <a href="#">Customer Configuration</a>
	Section:	Password Options
	Field:	Reset Password Template
<b>Magento_Directory</b>		
Currency Update Warnings	Page:	General > <a href="#">Currency Setup</a>
	Section:	Scheduled Import Settings
	Field:	Error Email Template
<b>Magento_Email</b>		
Footer	n/a	
Footer (Magento/luma)	n/a	
Header	n/a	

**Email Templates (cont.)**

TEMPLATE	CONFIGURATION PATH	
Magento_Newsletter		
Subscription Confirmation	Page:	Customers > Newsletter
	Section:	Subscription Options
	Field:	Confirmation Email Template
Subscription Success	Page:	Customers > Newsletter
	Section:	Subscription Options
	Field:	Success Email Template
Unsubscription Success	Page:	Customers > Newsletter
	Section:	Subscription Options
	Field:	Unsubscription Email Template
Magento_ProductAlert		
Cron Error Warning	Page:	Catalog > Catalog
	Section:	Product Alerts Run Settings
	Field:	Error Email Template
Price Alert	Page:	Catalog > Catalog
	Section:	Product Alerts
	Field:	Price Alert Email Template
Stock Alert	Page:	Catalog > Catalog
	Section:	Product Alerts
	Field:	Stock Alert Email Template
Magento_Sales		
Credit Memo Update	Page:	Sales > Sales Emails
	Section:	Credit Memo Contents

**Email Templates (cont.)**

TEMPLATE	CONFIGURATION PATH	
	Field:	Credit Memo Comment Email Template
Credit Memo Update (Magento/luma)	Page:	Sales > <b>Sales Emails</b>
	Section:	Credit Memo Comments
	Field:	Credit Memo Comment Email Template
Credit Memo Update for Guest	Page:	Sales > <b>Sales Emails</b>
	Section:	Credit Memo Comments
	Field:	Credit Memo Comment Email Template for Guest
Credit Memo Update for Guest (Magento/luma)	Page:	Sales > <b>Sales Emails</b>
	Section:	Credit Memo Comments
	Field:	Credit Memo Comment Email Template for Guest
Invoice Update	Page:	Sales > <b>Sales Emails</b>
	Section:	Invoice Comments
	Field:	Invoice Comment Email Template
Invoice Update (Magento/luma)	Page:	Sales > <b>Sales Emails</b>
	Section:	Invoice Comments
	Field:	Invoice Comment Email Template
Invoice Update for Guest	Page:	Sales > <b>Sales Emails</b>
	Section:	Invoice Comments
	Field:	Invoice Comment Email Template for Guest
New Credit Memo	Page:	Sales > <b>Sales Emails</b>
	Section:	Credit Memo
	Field:	Credit Memo Email Template

**Email Templates (cont.)**

TEMPLATE	CONFIGURATION PATH	
New Credit Memo (Magento/luma)	Page:	Sales > <a href="#">Sales Emails</a>
	Section:	Credit Memo
	Field:	Credit Memo Email Template
New Credit Memo for Guest	Page:	Sales > <a href="#">Sales Emails</a>
	Section:	Credit Memo
	Field:	Credit Memo Email Template for Guest
New Credit Memo for Guest (Magento/luma)	Page:	Sales > <a href="#">Sales Emails</a>
	Section:	Credit Memo
	Field:	Credit Memo Email Template for Guest
New Invoice	Stores -> Configuration -> Sales Emails -> Invoice -> Invoice Email Template (Default Config)	
	Page:	Sales > <a href="#">Sales Emails</a>
	Section:	Invoice
	Field:	Invoice Email Template
New Invoice (Magento/luma)	Stores -> Configuration -> Sales Emails -> Invoice -> Invoice Email Template (Default Config)	
	Page:	Sales > <a href="#">Sales Emails</a>
	Section:	Invoice
	Field:	Invoice Email Template
New Invoice for Guest	Stores -> Configuration -> Sales Emails -> Invoice -> Invoice Email Template for Guest (Default Config)	
	Page:	Sales > <a href="#">Sales Emails</a>
	Section:	Invoice
	Field:	Invoice Email Template for Guest
New Invoice for Guest (Magento/luma)	Stores -> Configuration -> Sales Emails -> Invoice -> Invoice Email Template for Guest (Default Config)	

**Email Templates (cont.)**

TEMPLATE	CONFIGURATION PATH	
	Page:	Sales > <a href="#">Sales Emails</a>
	Section:	Invoice
	Field:	Invoice Email Template for Guest
New Order	Page:	Sales > <a href="#">Sales Emails</a>
	Section:	Order
	Field:	New Order Confirmation Template
New Order (Magento/luma)	Page:	Sales > <a href="#">Sales Emails</a>
	Section:	Order
	Field:	New Order Confirmation Template
New Order for Guest	Page:	Sales > <a href="#">Sales Emails</a>
	Section:	Order
	Field:	New Order Confirmation Template for Guest
New Order for Guest (Magento/luma)	Page:	Sales > <a href="#">Sales Emails</a>
	Section:	Order
	Field:	New Order Confirmation Template for Guest
New Shipment	Page:	Sales > <a href="#">Sales Emails</a>
	Section:	Shipment
	Field:	Shipment Email Template
New Shipment (Magento/luma)	Page:	Sales > <a href="#">Sales Emails</a>
	Section:	Shipment
	Field:	Shipment Email Template
New Shipment for Guest	Page:	Sales > <a href="#">Sales Emails</a>
	Section:	Shipment

**Email Templates (cont.)**

TEMPLATE	CONFIGURATION PATH	
	Field:	Shipment Email Template for Guest
New Shipment for Guest (Magento/luma)	Page:	Sales > <a href="#">Sales Emails</a>
	Section:	Shipment
	Field:	Shipment Email Template for Guest
Order Update	Page:	Sales > <a href="#">Sales Emails</a>
	Section:	Order Comments
	Field:	Order Comment Email Template
Order Update (Magento/luma)	Page:	Sales > <a href="#">Sales Emails</a>
	Section:	Order Comments
	Field:	Order Comment Email Template
Order Update for Guest	Page:	Sales > <a href="#">Sales Emails</a>
	Section:	Order Comments
	Field:	Order Comment Email Template for Guest
Order Update for Guest (Magento/luma)	Page:	Sales > <a href="#">Sales Emails</a>
	Section:	Order Comments
	Field:	Order Comment Email Template for Guest
Shipment Update	Page:	Sales > <a href="#">Sales Emails</a>
	Section:	Shipment Comments
	Field:	Shipment Comment Email Template
Shipment Update (Magento/luma)	Page:	Sales > <a href="#">Sales Emails</a>
	Section:	Shipment Comments
	Field:	Shipment Comment Email Template



**Email Templates (cont.)**

TEMPLATE	CONFIGURATION PATH	
Shipment Update for Guest	Page:	Sales > <b>Sales Emails</b>
	Section:	Shipment Comments
	Field:	Shipment Comment Email Template for Guest
Shipment Update for Guest (Magento/luma)	Page:	Sales > <b>Sales Emails</b>
	Section:	Shipment Comments
	Field:	Shipment Comment Email Template for Guest
<b>Magento_SendFriend</b>		
Send Product Link to Friend	Page:	Catalog > <b>Email to a Friend</b>
	Section:	Email Templates
	Field:	Select Email Template
<b>Magento_Sitemap</b>		
Sitemap Generation Settings	Page:	Catalog > <b>XML Sitemap</b>
	Section:	Generation Settings
	Field:	Error Email Template
<b>Magento_User</b>		
Forgot Admin Password	Page:	Advanced > <b>Admin</b>
	Section:	Admin User Emails
	Field:	Forgot Password Email Template
User Notification	Stores -> Configuration -> Admin -> Admin User Emails -> User Notification Template (Default Config)	
	Page:	Advanced > <b>Admin</b>
	Section:	Admin User Emails
	Field:	User Notification Template

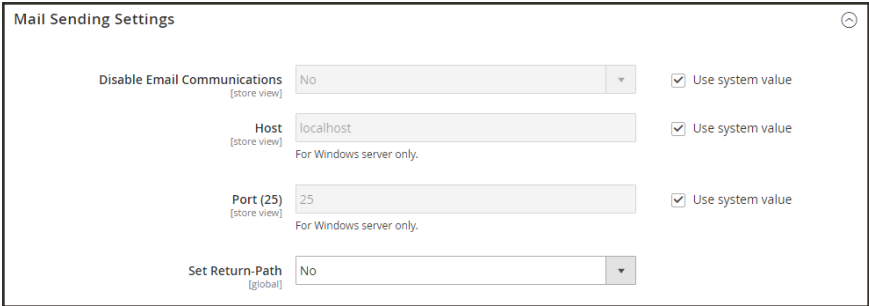
Email Templates (cont.)

TEMPLATE	CONFIGURATION PATH	
Magento_Wishlist		
Magento Wish List Sharing	Page:	Customers > <b>Wish List</b>
	Section:	Share Options
	Field:	Email Template

Configuring Email Communications

The Mail Sending Settings give you the ability to route returned email or replies to email to a specific address. Also, if your store is running on a Windows server, you can verify the host and port settings.

**Security Notice!** We recommend that all merchants immediately set their mail sending configuration to protect against a recently identified potential remote code execution exploit. Until this issue is resolved, we highly recommend that you avoid using **Sendmail** for email communications. In the Mail Sending Settings, make sure that Set Return Path is set to "No." To learn more, see the [Magento Security Center posting](#).



Mail Sending Settings

To configure email communications:

- 1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
- 2. In the panel on the left under **Advanced**, choose **System**.
- 3. Expand the **Mail Sending Settings** section. Then, do the following:
  - a. If necessary, set **Disable Email Communications** to “No.”
  - b. If running on a Windows server, verify the following settings:

Host	localhost
Port (25)	25

- c. Until the current **security issue** is resolved, we highly recommend that you set **Set Return Path** to "No."

No	( <b>Recommended Security Measure</b> ) Routes returned email to the default store email address.
Yes	Routes returned email to the default store email address.
Specified	Routes returned email to the email address specified in the <b>Return Path Email</b> field.

4. When complete, tap **Save Config.**





## CHAPTER 30:

# Sales Documents

In addition to the email messages related to a sale, your store generates invoices, packing slips, and credit memos in both HTML and PDF formats. Before your store goes live, make sure to update these documents with your logo and store address. You can customize the address format, and also include additional information for reference.

- Invoices
- Packing Slips
- Credit Memos

## Preparing Your Invoice Logo


Unlike the logo images used in HTML, the logo for PDF invoices and other sales documents can be a high-resolution, 300 dpi image. However, the image must be rendered to fit a space that is 200 pixels wide by 50 pixels high. Be careful to preserve the aspect ratio when you resize the logo. Resize the logo to fit the height, and don't worry about any unused space to the right.



*200 x 50 pixels*

One way to resize your logo to fit the required size is to create a new, blank image with the correct dimensions. Then, paste your logo image and resize it to fit the height. With most image editing programs, you can either scale it by a percentage to preserve the aspect ratio, or hold down the shift key and manually resize the image.

### To configure invoices and packing slips:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Sales**.
3. Expand  the **Invoice and Packing Slip Design** section. Then, do the following:

### *Invoice and Packing Slip Design*

- a. To upload the **Logo for PDF Print-outs**, tap **Choose File**. Find the logo that you have prepared, and tap **Open**.
- b. To upload the **Logo for HTML Print View**, tap **Choose File**. Find the logo that you have prepared, and tap **Open**.

4. Enter your address as you want it to appear on invoices and packing slips.
5. When complete, tap **Save Config.**

For reference, a thumbnail of the uploaded image appears before each field. Don't worry if the thumbnail appears distorted. The proportion of the logo will be correct on the invoice.

### To replace an image:

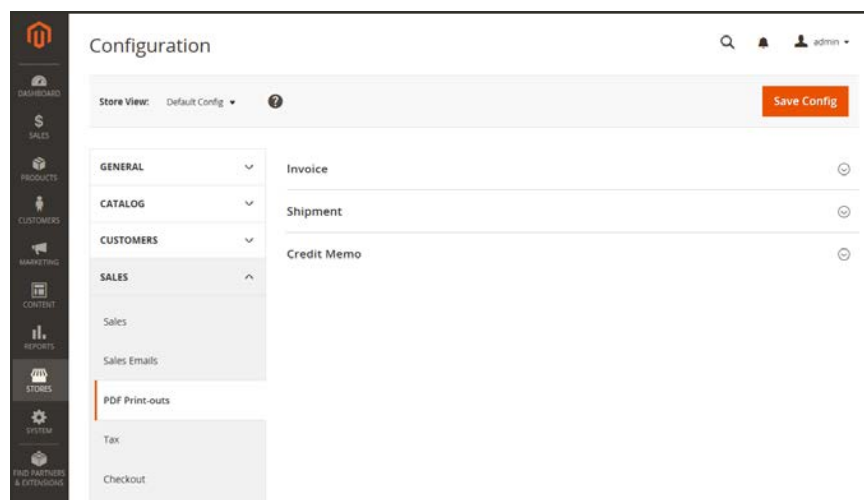
1. Tap **Choose File** and choose a different logo file.
2. Mark the **Delete Image** checkbox for the image you want to replace.
3. Tap **Save Config.**

### Image Formats

FORMAT	REQUIREMENTS
<b>PDF</b>	
File Format	JPG (JPEG), PNG, TIF (TIFF)
Image Size	200 pixels wide x 50 pixels high
Resolution	300 dpi recommended
<b>HTML</b>	
File Format	JPG (JPEG), PNG, GIF
Image Size	Determined by theme.
Resolution	72 or 96 dpi

## Adding Reference IDs to Header

The Order ID and customer IP address can be included in the header of sales documents that accompany an order. By default, both the Order ID and customer IP address appear in the header of invoices, shipment packing slips, and credit memos.



*PDF Print-outs*

### To change the Order ID setting:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **PDF Print-outs**.
3. Expand ☑ the **Invoice** section.




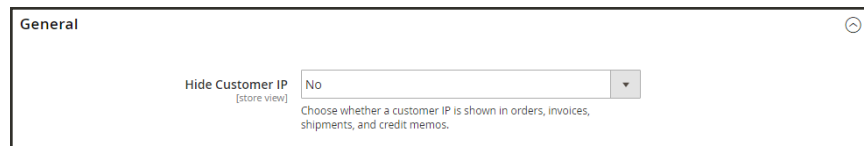
*Invoice*

4. Set **Display Order ID in Header** according to your preference.
5. Repeat for the **Shipment** and **Credit Memo** sections.
6. When complete, tap **Save Config**.



### To change the customer IP address setting:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Sales**.
3. Expand  the **General** section.



The screenshot shows a configuration panel titled 'General' with a close icon in the top right corner. Inside the panel, there is a setting for 'Hide Customer IP' with a sub-label '[store view]'. The value is set to 'No' in a dropdown menu. Below the dropdown, there is a descriptive text: 'Choose whether a customer IP is shown in orders, invoices, shipments, and credit memos.'

#### *General*

4. Set **Hide Customer IP** to your preference.
5. When complete, tap **Save Config.**

# Customer Address Templates

You can modify the template that determines the format of customer billing and shipping addresses that appear on printed invoices, shipments, and refunds, as well as in the address book of the customer account.

## Example 1: Text Templates

### For Text, Text One Line, HTML and PDF Address Templates

```
{{depend address attribute code}} a space, a character, or UI label
{{/depend}};

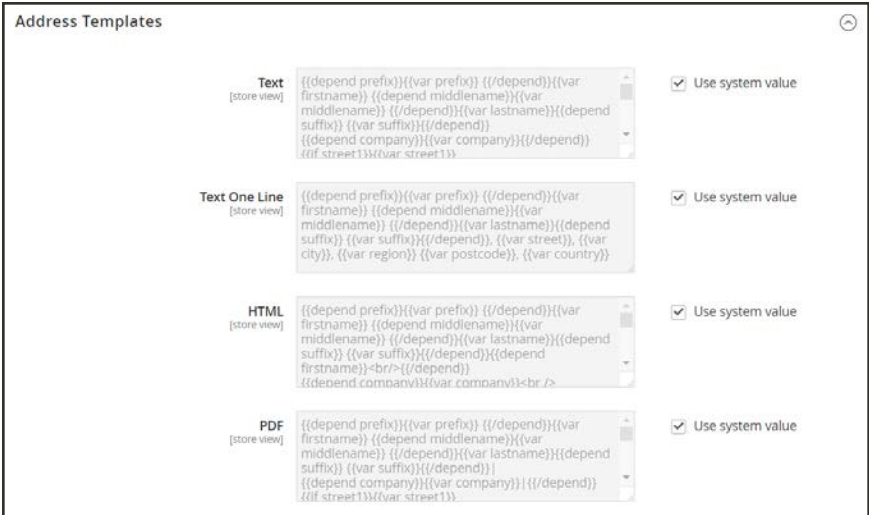
{{if address attribute code}}{{var address attribute code}} a space, a
character, or UI label

{{/if}}
```

## Example 2: JavaScript Template


### For JavaScript Address Template

```
#{address attribute code} or User Interface label #{address attribute code}
```



Address Templates

**To change the order of address fields:**

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Customers**, choose **Customer Configuration**.
3. Expand  the **Address Templates** section. The section includes a separate set of formatting instructions for each of the following:
  - Text
  - Text One Line
  - HTML
  - PDF
4. Edit each template as needed, using the examples for reference.
5. When complete, tap **Save Config.**





## CHAPTER 31:

# Newsletters

Publishing a regular newsletter is considered to be one of the most powerful and affordable marketing tools available. Magento Commerce gives you the ability to publish and distribute newsletters to customers who have subscribed, plus tools to produce your newsletter, build and manage your list of subscribers, develop content, and drive traffic to your store. You can also use [Page Hierarchy](#) to create an archive of past issues.

You can add capabilities by integrating your Magento installation with a third-party newsletter service provider and by adding extensions. To learn more, see [Magento Connect](#).

# Configuring Newsletters

The first step in creating newsletters is to configure the newsletter settings for your site. You can require customers to click a confirmation link that is sent by email to confirm the subscription. This **double opt-in**<sup>1</sup>, method requires customers to confirm twice that they want to receive your newsletter, and reduces the possibility that it might be considered to be spam.

## To configure subscription options:

- 1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
- 2. In the panel on the left under **Customers**, choose **Newsletter**.
- 3. If necessary, expand ☑ the **Subscription Options** section. Then, do the following:

Subscription Options

Success Email Template

Subscription Success (Default)

Use system value

Unsubscription Email Sender

Customer Support

Use system value

Unsubscription Email Template

Unsubscription Success (Default)

Use system value

Success Email Sender

General Contact

Use system value

Confirmation Email Template

Subscription Confirmation (Default)

Use system value

Need to Confirm

No

Use system value

Confirmation Email Sender

Customer Support

Use system value

Allow Guest Subscription

Yes

Use system value

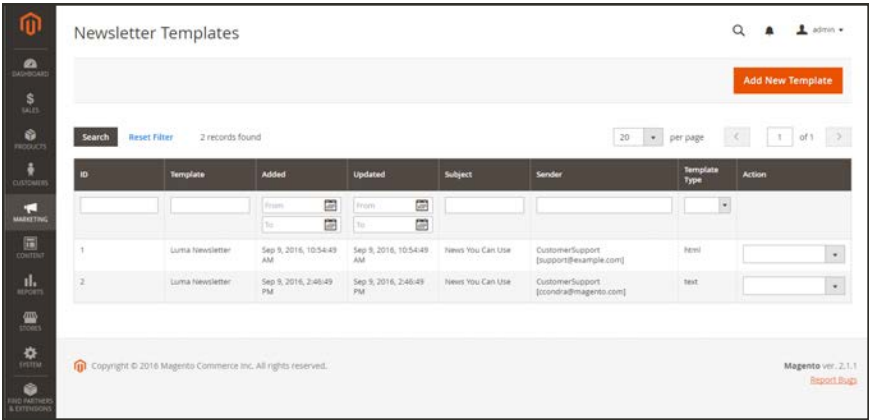
Subscription Options

<sup>1</sup>The process for subscribing email recipients by requiring them to take a secondary step to confirm that they want to receive emails.

- a. Confirm the email template and sender of the each of the following email messages that are sent to subscribers:
      - Success email
      - Confirmation email
      - Unsubscribe email
    - b. To use the double opt-in process to confirm subscriptions, set **Need to Confirm** to “Yes.”
    - c. To allow people who do not have an account with your store to subscribe to the newsletter, set **Allow Guest Subscription** to “Yes.”
  4. When complete, tap **Save Config.**

# Newsletter Templates

You can create as many newsletter templates as you need for different purposes. You might send a weekly product update, a monthly newsletter, or annual holiday newsletter. Newsletter templates can be prepared with HTML markup, or as plain text. Unlike HTML, plain text newsletters contain no images, rich text, or formatted links. In the grid, the Template Type column indicates whether a template is HTML or text.



Newsletter Templates

## To create a newsletter template:

1. On the Admin sidebar, tap **Marketing**. Then under **Communications**, choose **Newsletter Template**.
2. To add a new template, click the **Add New Template** button. Then, do the following:
  - a. In the **Template Name** enter name for internal reference.
  - b. In the **Template Subject** field, describe the purpose of the newsletter.
  - c. In the **Sender Name** field , enter the name of the person who is to appear as the sender of the newsletter.
  - d. In the **Sender Email** field, enter the email address of the newsletter sender.

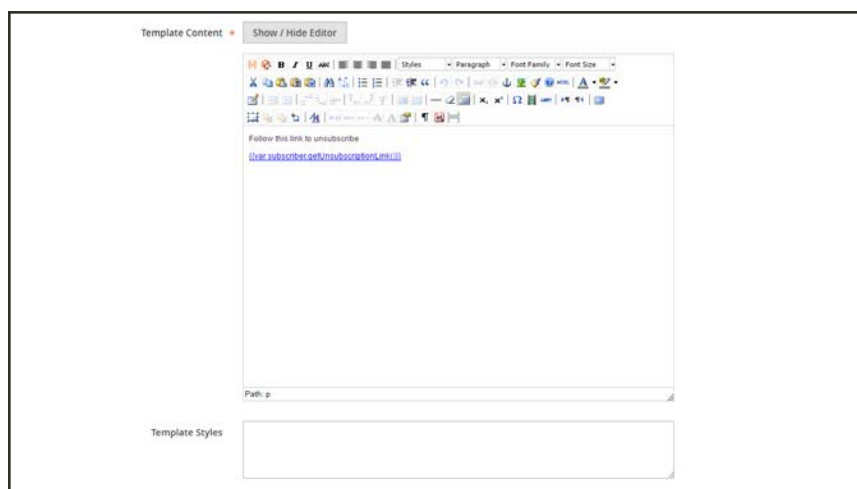




- e. At the **Template Content** field, tap **Show / Hide Editor** to display the WYSIWYG editor. Then, update the content as needed. To learn more, see: [Using the Editor](#).

Do not remove the unsubscribe link at the bottom of the template content. In some jurisdictions, the link is required by law.

- f. In the **Template Styles** field, enter the CSS declarations needed to format the content.



*Template Information*

3. Tap **Preview Template** to see how it looks. Then, make any changes that are needed.
4. When complete, tap **Save Template**.

After you save a template, a **Save As** button appears the next time you edit the template. It can be used to save variations of the template without overwriting the original.

### To convert the template to plain text:

1. At the top of the page, tap **Convert to Plain Text**. When prompted to confirm, tap **OK**.
2. To preview the plain text version of the template, tap **Preview Template**. The preview opens in a new browser tab.
3. To save the plain text version, tap **Save Template**.

### To restore the HTML:

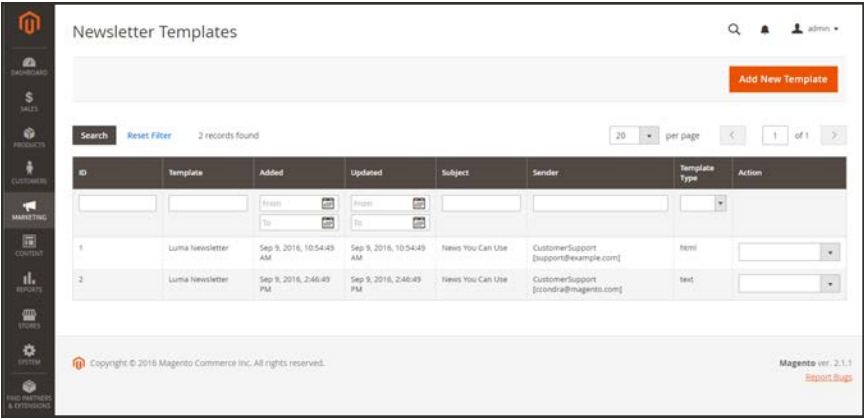
1. At the top of the page, tap **Return HTML Version**.
2. To preview the HTML version of the template, tap **Preview Template**. The preview opens in a new browser tab.
3. To save the HTML version, tap **Save Template**.

# Sending Newsletters


To manage the load on the server, newsletters with many subscribers are sent in a queue of multiple batches. You can check the newsletter queue periodically to check the status, and see how many have been processed. Any problems that occur during transmission appear on the Newsletter Problem Report.

## To send a newsletter:

- 1. On the Admin menu, tap **Marketing**. Then under **Newsletters**, choose **Newsletter Templates**.
- 2. In the grid, find the template for the newsletter that is to be sent. Then, set the **Action** column to “Queue Newsletter.”



*Add to Newsletter Queue*

- 3. In the **Queue Date Start** field, select the date that the transmission is to begin from the calendar (  ).
- 4. In the **Subscribers From** list select each store view that is to be included in the email blast.
- 5. Complete the email header information as follows:
  - a. Enter a brief description of the newsletter for the **Subject** line of the email header.
  - b. Enter the **Sender Name**.
  - c. In the **Sender Email** field, enter the email address of the sender.

The default name and email address of the sender is specified in the configuration.

**Queue Information**

Queue Date Start:

Subscribers From: 

Main Website  
Main Website Store  
English  
French  
German  
Spanish

Subject:

Sender Name:

Sender Email:

6. If applicable, enter a note in the **Message** box above the instructions to unsubscribe. Do not remove the instructions, which are required by law in many jurisdictions.
7. When complete, tap **Save and Resume**.

The newsletter appears in the queue waiting to be processed.

**Newsletter Queue**

✓ You saved the newsletter queue.

Search [Reset Filter](#) 1 records found

20 per page 1 of 1

ID	Queue Start	Queue End	Subject	Status	Processed	Recipients	Action
1	Sep 9, 2016, 10:04:35 AM	---	News You Can Use	Not Sent	0	0	<a href="#">View</a>

Copyright © 2016 Magento Commerce Inc. All rights reserved. Magento ver. 2.1.1 [Report a Bug](#)

*Newsletter Queue*

### To check for problems:

1. On the Admin menu, tap **Reports**.
2. Under **Marketing**, choose **Newsletter Problem Reports**.

# Managing Subscribers

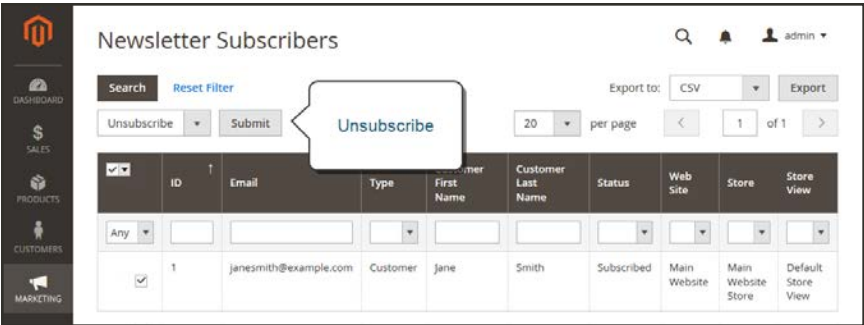
As a best practice you should manage your subscription list on a regular basis, and make sure to process any requests to unsubscribe. In some jurisdictions, it is required by law that requests to unsubscribe are processed within a specific period of time.

If you want to use a third-party service to send newsletters, you can export your subscription list as a CSV or XML file.

## To cancel a subscription:

- 1. On the Admin sidebar, tap **Marketing**. Then under **Communications**, choose **Newsletter Subscribers**.
- 2. Find the subscriber in the grid. Then, mark the checkbox in the first column.
- 3. Set the **Action** control to “Unsubscribe.” Then, tap **Submit**.

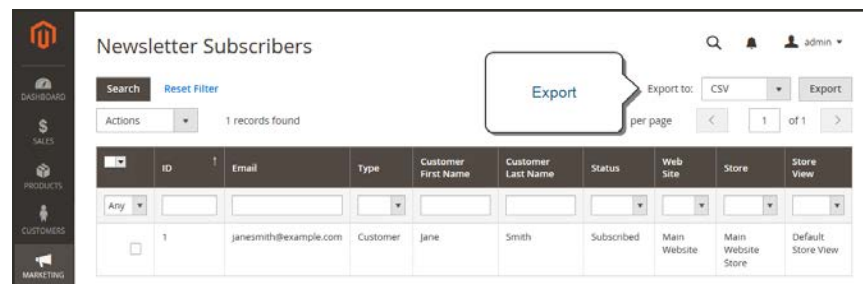
The status of the record changes to “Unsubscribed.”



Unsubscribe

**To export the list of subscribers:**

1. From the Newsletter Subscribers list, use the filter controls to include only records with a **Status** of “Subscribed,” and for the appropriate website, store, or store view.
2. Set the **Export to** control to one of the following:
  - CSV
  - XML
3. Tap **Export**. Then, look for the prompt at the bottom of the screen, and save the file.

*Export Newsletter Subscribers*



## CHAPTER 32:

# RSS Feeds

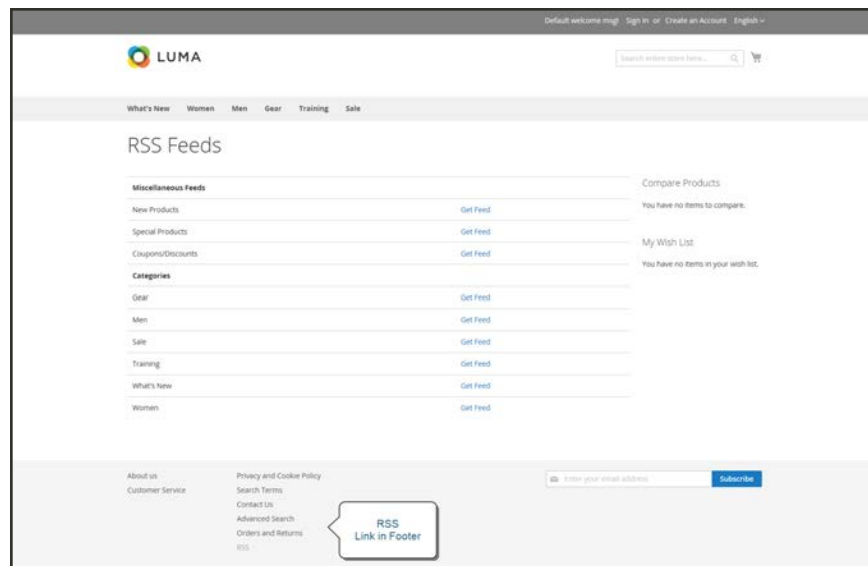
RSS (Really Simple Syndication) is an XML-based data format that is used to distribute information online. Your customers can subscribe to your RSS feeds to learn of new products and promotions. RSS Feeds can also be used to publish your product information to shopping aggregation sites, and can be included in newsletters.

When RSS feeds are enabled, any additions to products, specials, categories, and coupons are automatically sent to the subscribers of each feed. A link to all RSS feeds that you publish is in the footer of your store.



The orange RSS symbol is typically used to identify an RSS feed.

The software that is required to read an RSS feed is called a **feed reader**<sup>1</sup>, and allows people to subscribe to headlines, blogs, podcasts, and much more. Google Reader is one of the many feed readers that are available online for free.



*RSS Feeds*

<sup>1</sup>Software that is used to read syndicated content from RSS feeds.

### To set up RSS feeds for your store:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the upper-right corner, set **Store View** to the view(s) where the feeds are to be available. If prompted to confirm, tap **OK**.
3. In the panel on the left, under **Catalog**, choose **RSS Feeds**.
4. Expand ☑ the **Rss Config** section. Then, set **Enable RSS** to “Enable.”

If necessary, clear the **Use Website** checkbox to change the default value.

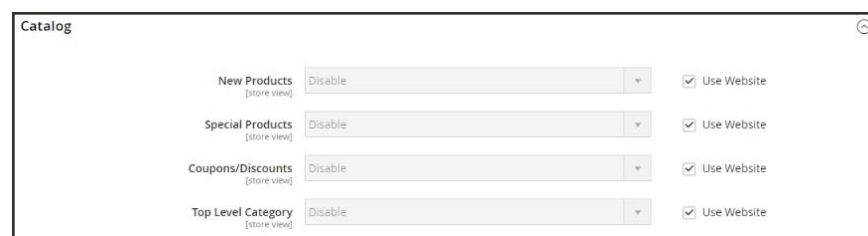


Rss Config

Enable RSS [store view] Enable ▼ ☐ Use Website

#### RSS Feeds

5. Expand ☑ the **Wish List** section. Then, set **Enable RSS** to “Enable.”
6. Expand ☑ the **Catalog** section and set other feeds to “Enable” as needed.
  - New Products
  - Special Products
  - Coupons/Discounts
  - Top Level Category



Catalog

New Products [store view]	Disable ▼	<input checked="" type="checkbox"/> Use Website
Special Products [store view]	Disable ▼	<input checked="" type="checkbox"/> Use Website
Coupons/Discounts [store view]	Disable ▼	<input checked="" type="checkbox"/> Use Website
Top Level Category [store view]	Disable ▼	<input checked="" type="checkbox"/> Use Website

#### Catalog

7. Expand ☑ the **Order** section. Then, set **Customer Order Status Notification** to “Enable.”
8. When complete, tap **Save Config**.



## Types of RSS Feeds

RSS FEED	DESCRIPTION
Wish List	When enabled, an RSS feed link appears at the top of customer wish list pages. Additionally, the wish list sharing page includes a checkbox that lets you include a link to the feed from shared wish lists.
New Products	Publishes notification of new products added to the catalog.
Special Products	Publishes notification of any products with special pricing.
Coupons / Discounts	Publishes notification of any special coupons or discounts that are available in the store.
Top Level Category	Publishes notification of any change to the top-level category structure of your catalog, which is reflected in the main menu.
Customer Order Status	Gives customers the ability to track their order status by RSS feed. When enabled, an RSS feed link appears on the order.





## CHAPTER 33:

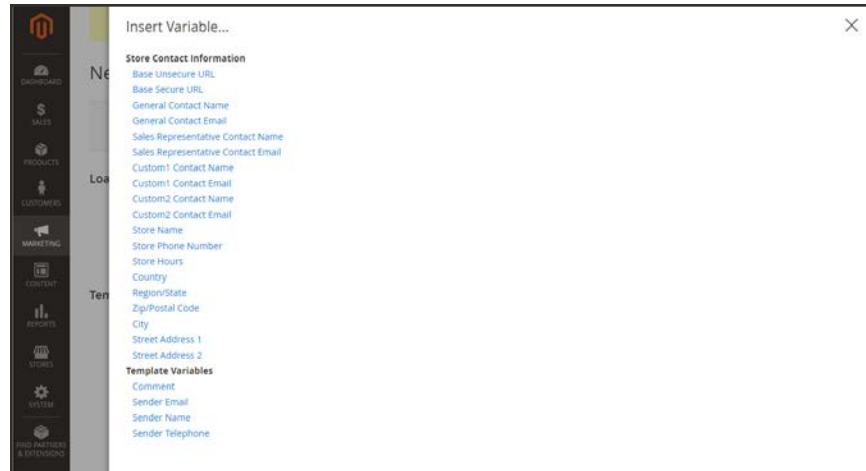
# Using Variables

Variables are pieces of information that can be created once and used in multiple places, such as email templates, blocks, and content pages. Your store includes a large number of predefined variables that can be used to personalize communications. In addition, you can create your own custom variables.

- Predefined Variables
- Custom Variables

## Adding Predefined Variables

Predefined variables are easy to add to content email templates and content pages to personalize communications. The selection of available variables depends on the template.



*Variables for Contact Form Template*

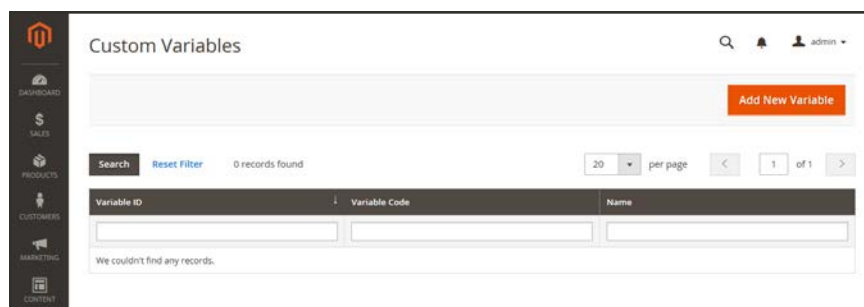
### To add a variable to an email template:

1. On the Admin sidebar, tap **Marketing**. Then under **Communications**, choose **Email Templates**.
2. Do one of the following:
  - Load an existing template.
  - Add a new template.
3. In the **Template Content** box, position the insertion point where you want the variable to appear. Then, tap **Insert Variable**.
4. In the list of available variables, choose the one you want to insert into the template.
5. To preview the template in a new browser window, tap **Preview**. Then, return to the main window.
6. When complete, tap **Save Template**.

## Adding Custom Variables

If you know a little basic HTML, you can create custom variables and use a **markup tag** to incorporate them into pages, blocks, banners, and email templates.

```
{{CustomVar code= "my_custom_variable"}}
```

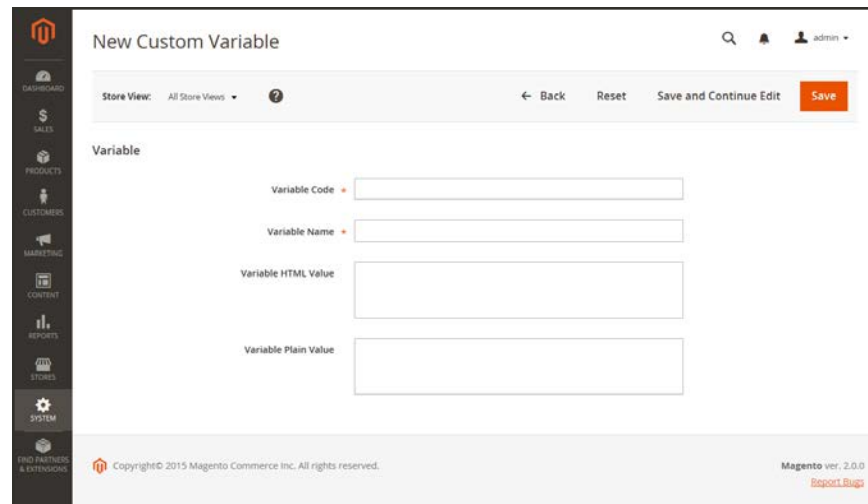


*Custom Variables*

### To create a custom variable:

1. On the Admin sidebar, tap **System**. Then under **Other Settings**, choose **Custom Variables**.
2. Tap **Add New Variable**.
3. Enter an identifier in the **Variable Code** field. Use all lowercase characters, without spaces.
4. Enter a **Variable Name**, which is used for internal reference. Then, do one of the following:
  - In the **Variable HTML Value** text field, enter any content you want to include, using basic HTML tags. This option allows you to format the value.
  - In the **Variable Plain Value** field, enter the variable value as plain text.

You can drag the lower-right corner to make the boxes bigger.



The screenshot shows the 'New Custom Variable' form in the Magento 2 admin interface. The form is titled 'New Custom Variable' and includes a 'Store View' dropdown set to 'All Store Views'. At the top right, there are links for 'Back', 'Reset', 'Save and Continue Edit', and a red 'Save' button. The form contains four input fields: 'Variable Code', 'Variable Name', 'Variable HTML Value', and 'Variable Plain Value'. The left sidebar shows the 'SYSTEM' menu item selected. The footer includes the Magento logo, copyright information for 2015, and the version 'Magento ver. 2.0.0' with a 'Report Bugs' link.

*New Custom Variable*

5. When complete, tap **Save**.

## Markup Tags

A **markup tag** is a snippet of code that contains a relative reference to an object in your store, such as a variable, URL, image, or block. Markup tags can be incorporated into the HTML of content pages, blocks, email templates, newsletters, and so on.

Markup tags are enclosed in double, curly braces, and can either be generated by the Widget tool, or typed directly into HTML content. For example, rather than hard-coding the full path to a page, you can use a markup tag to represent the store URL. The markup tags featured in the following examples include:

### Custom Variable

The Variable markup tag can be used to insert a **custom variable** into an email templates, blocks, newsletters, and content pages,

```
{{CustomVar code= "my_custom_variable"}}
```

### Store URL

The Store URL markup tag represents the base URL of your website, and is used as a substitute for the first part of a full URL, including the domain name. There are two versions of this markup tag: One that goes directly to your store, and the other with a forward slash at the end that is used when a path is added.

```
{{store url='apparel/shoes/womens'}}
```

### Media URL

The dynamic media URL markup tag represents the location and file name of an image that is stored on a content delivery network (CDN). The tag can be used to place an image on a page, block, banner, or email template.

```
{{media url='shoe-sale.jpg'}}
```

## Block ID

The Block ID markup tag is one of the easiest to use, and can be used to place a block directly on a CMS page, or even nested inside another block. You can use this technique to modify a block for different promotions or languages. The Block ID markup tag references a block by its identifier.

```
{{block id='block-id'}}
```

## Template Tag

A template tag references a PHTML template file, and can be used to display the block on a CMS page or static block. The code in the following example can be added to a page or block to display the Contact Us form.

### “Contact Us” Template Tag

```
{{block type="core/template" name="contactForm"  
template="contacts/form.phtml"}}
```

The code in the next example can be added to a page or block to display the a list of products in a specific category, by category ID.

### “Category Product List” Template Tag

```
{{block type="catalog/product_list" category_id="22"  
template="catalog/product/list.phtml"}}
```



## Widget Code

The Widget tool can be used to display lists of products, or to insert complex links, such as one that goes to a specific product page, based on product ID. The code that is generated includes the block reference, location of the code module, and corresponding PHTML template. After the code is generated, you can copy and paste it from one place to another.

The code in the following example can be added to a page or block to display the list of new products.

### “New Products Grid” Code

```
{{widget type="catalog/product_widget_new"
display_type="new_products" products_count="10"
template="catalog/product/widget/new/content/new_grid.phtml"}}
```

The code in the next example can be added to a page or block to display a link to a specific product, by product ID.

### “Link to Product” Code

```
{{widget type="catalog/product_widget_link" anchor_text="My Product Link"
title="My Product Link" template="catalog/product/widget/link/link_
block.phtml"
id_path="product/31"}}
```

## Using Markup Tags in Links

You can use markup tags with HTML anchor tags, and link directly to any page in your store. The link can be incorporated into content pages, blocks, banners, or email and newsletter templates. You can also use this technique to link an image to a specific page.

**Process Overview:**

Step 1: **Identify the Destination URL**

Step 2: **Add the Markup to the URL**

Step 3: **Complete the Anchor Tag**

### Step 1: Identify the Destination URL

If possible, navigate to the page that you want to link to, and copy the full URL from the address bar of your browser. The part of the URL that you need comes after the “dot com forward slash.” Otherwise, copy the URL Key from the CMS page that you want to use as the link destination.

**Full URL to Category Page**

```
http://mystore.com/apparel/shoes/womens
```

```
http://mystore.com/apparel/shoes/womens.html
```

**Full URL to Product Page**

```
http://mystore.com/apparel/shoes/womens/nine-west-pump
```

```
http://mystore.com/apparel/shoes/womens/nine-west-pump.html
```

**Full URL to CMS Page**

```
http://mystore.com/about-us
```

## Step 2: Add the Markup to the URL

The Store URL tag represents the base URL of your website, and is used as a substitute for the “http address” part of the store URL, including the domain name and “dot com.” There are two versions of the tag, which you can use, depending on the results you want to achieve.

<code>store direct_url</code>	Links directly to a page.
<code>store url</code>	Places a forward slash at the end, so additional references can be appended as a path.

In the following examples, the URL Key is enclosed in single quotes, and the entire markup tag is enclosed in double curly braces. When used with an anchor tag, the markup tag is placed inside the double quotes of the anchor. To avoid confusion, you can alternate using single-and double quotes for each nested set of quotes.

1. If you are starting with a full URL, delete the “http address” part of the URL, up through and including the “dot.com forward slash.” In its place, type the Store URL markup tag, up through the opening single quote.

### Store URL Markup Tag

```
http://mystore.com/apparel/shoes/womens  
{{store url='apparel/shoes/womens'}}
```

Otherwise, type the first part of the Store URL markup tag, and paste the URL key or path that you copied earlier.

### Store URL Markup Tag with URL Key

```
{{store url='  
{{store url='apparel/shoes/womens'}}
```

2. To complete the markup tag, type the closing double quotes and double braces.

### Step 3: Complete the Anchor Tag

1. Wrap the completed markup tag inside an anchor tag, using the markup tag instead of the target URL. Then, add the link text, and closing anchor tag.

#### Markup in Anchor Tag

```
<a href="{{markup tag goes here}}">Link Text</a>
```

2. Paste the completed anchor tag into the code of any CMS page, block, banner, or email template, where you want the link to appear.

#### Complete Link with Markup

```
<a href="{{store url='apparel/shoes'}}">Shoe Sale</a>
```

## Variable Reference

Most email templates have a section of additional variables that are specific to the template. The following are examples of some frequently used templates.

### Email Template Variables

VARIABLE	MARKUP TAG
Email Footer Template	<code>{{template config_path="design/email/footer_template"}}</code>
Email Header Template	<code>{{template config_path="design/email/header_template"}}</code>
Email Logo Image Alt	<code>{{var logo_alt}}</code>
Email Logo Image URL	<code>{{var logo_url}}</code>
Email Logo Image Height	<code>{{var logo_height}}</code>
Email Logo Image Width	<code>{{var logo_width}}</code>
Template CSS	<code>{{var template_styles raw}}</code>

### Store Contact Information Variables

VARIABLE	MARKUP TAG
Base Unsecure URL	<code>{{config path="web/unsecure/base_url"}}</code>
Base Secure URL	<code>{{config path="web/secure/base_url"}}</code>
General Contact Name	<code>{{config path="trans_email/ident_general/name"}}</code>
General Contact Email	<code>{{config path="trans_email/ident_general/email"}}</code>
Sales Representative Contact Name	<code>{{config path="trans_email/ident_sales/name"}}</code>
Sales Representative Contact Email	<code>{{config path="trans_email/ident_sales/email"}}</code>
Custom1 Contact Name	<code>{{config path="trans_email/ident_custom1/name"}}</code>
Custom1 Contact Email	<code>{{config path="trans_email/ident_custom1/email"}}</code>
Custom2 Contact Name	<code>{{config path="trans_email/ident_custom2/name"}}</code>

**Store Contact Information Variables (cont.)**

VARIABLE	MARKUP TAG
Custom2 Contact Email	<code>{{config path="trans_email/ident_custom2/email"}}</code>
Store Name	<code>{{config path="general/store_information/name"}}</code>
Store Phone Telephone	<code>{{config path="general/store_information/phone"}}</code>
Store Hours	<code>{{config path="general/store_information/hours"}}</code>
Country	<code>{{config path="general/store_information/country_id"}}</code>
Region/State	<code>{{config path="general/store_information/region_id"}}</code>
Zip/Postal Code	<code>{{config path="general/store_information/postcode"}}</code>
City	<code>{{config path="general/store_information/city"}}</code>
Street Address 1	<code>{{config path="general/store_information/street_line1"}}</code>
Street Address 2	<code>{{config path="general/store_information/street_line2"}}</code>
Store Contact Address	<code>{{config path="general/store_information/address"}}</code>

### New Account Template Variables

VARIABLE	MARKUP TAG
Customer Account URL	<code>{{var this.getUrl(\$store, 'customer/account/')}}</code>
Customer Email	<code>{{var customer.email}}</code>
Customer Name	<code>{{var customer.name}}</code>

### New Order Template Variables

VARIABLE	MARKUP TAG
Billing Address	<code>{{var formattedBillingAddress raw}}</code>
Email Order Note	<code>{{var order.getEmailCustomerNote()}}</code>
Order ID	<code>{{var order.increment_id}}</code>
Order Items Grid	<code>{{layout handle="sales_email_order_items" order=\$order area="frontend"}}</code>
Payment Details	<code>{{var payment_html raw}}</code>
Shipping Address	<code>{{var formattedShippingAddress raw}}</code>
Shipping Description	<code>{{var order.getShippingDescription()}}</code>

## SEO & Search



## Contents

In this section of the guide, we'll take a look at the search capabilities of your store, what you can learn from customer search terms, and how to make your products easy to find. Finally, you'll learn best practices and techniques that you can use to bring more traffic to your store.

### Catalog Navigation

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- Breadcrumb Trail
- Product Listings
- Pagination Controls
- Layered Navigation

### Catalog Search

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- Search Results
- Weighted Search
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## CHAPTER 34:

# Catalog Navigation

The term **navigation**<sup>1</sup> refers to the methods shoppers use to move from page to page throughout your store. The main menu, or top navigation of your store is actually a list of category links, and provides easy access to the products in your catalog. You will also find categories in the breadcrumb trail that runs across the top of most pages, and in the layered navigation that appears on the left side of some two- or three-column pages.

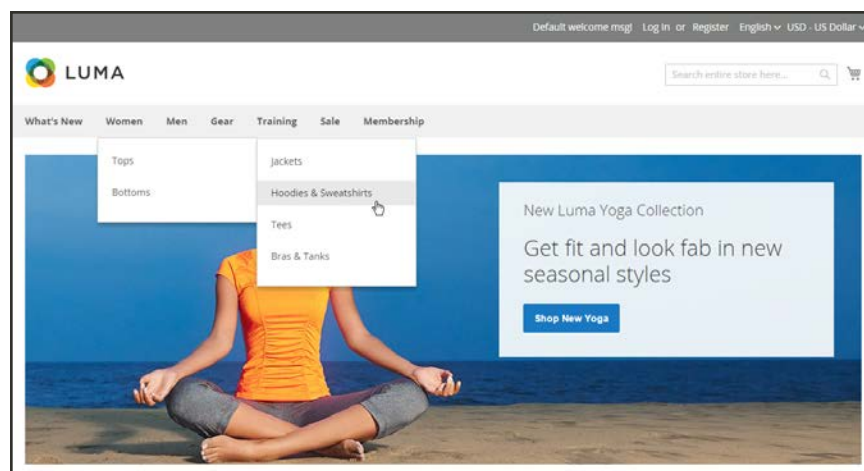
For a product to be visible in your store, it must be assigned to at least one category. Each category can have a dedicated landing page with an image, static block, a description, and a list of products in the category. You can also create special designs for category pages that are active only for a specific period of time such as for a holiday or promotion.

---

<sup>1</sup>The primary group of web page links that a customer uses to navigate around the website; the navigation links to the most important categories or pages on an online store.

## Top Navigation

The main menu of your store is like a directory to the different departments in your store. Each option represents a different category of products. The position and presentation of the top navigation might vary by theme, but the way it works is essentially the same.



*Top Navigation*

The category structure of your catalog can influence how well your site is indexed by search engines. The more deeply nested a category, the less likely it is to be thoroughly indexed. As a general rule, anywhere between one and three visible levels is considered to be the most effective. The **root category** counts as the first level, although it doesn't appear in the menu. The maximum number of levels that are available in the top navigation is determined by the configuration. In addition, there might be a limit to the number of menu levels that are supported by your store theme. For example, the sample Luma theme supports up to five levels, including the root.

### Counting Menu Levels

- |         |   |
|---------|---|
| Level 1 | The first level is the <b>root category</b> , which in the sample data is named "Default Category." The root is a container for the menu, and its name does not appear as an option in the menu.  |
| Level 2 | On a desktop display, the top navigation is the main menu that appears across the top of the page. On a mobile device, the main menu typically appears as a fly-out menu of options. The second-level options in the Luma store are "What's New," "Women," "Men," "Gear," "Training," and "Sale." |
| Level 3 | The third-level appears below each main menu option. For example, under "Women," the third-level options are "Tops" and "Bottoms."  |
| Level 4 | The fourth-level options are subcategories that fly out from a third-level option. For example, under "Tops," the fourth level menu options are "Jackets," "Hoodies & Sweatshirts," "Tees," and "Bras & Tanks."   |

### To set the depth of the top navigation:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, expand **Catalog**. Then, choose **Catalog**.
3. Expand the **Category Top Navigation** section.

Because the depth of the top navigation has a global **configuration scope**, the setting applies to all websites, stores, and store views in the Magento installation. The Category Top Navigation configuration section is available only when Store View in the upper-left corner is set to “Default Config.”



*Default Config*

4. To limit the number of subcategories that appear in the top navigation, enter the number in the **Maximal Depth** field.

The default Maximal Depth value is zero, which does not place a limit on the number of subcategory levels.

5. When complete, tap **Save Config**.

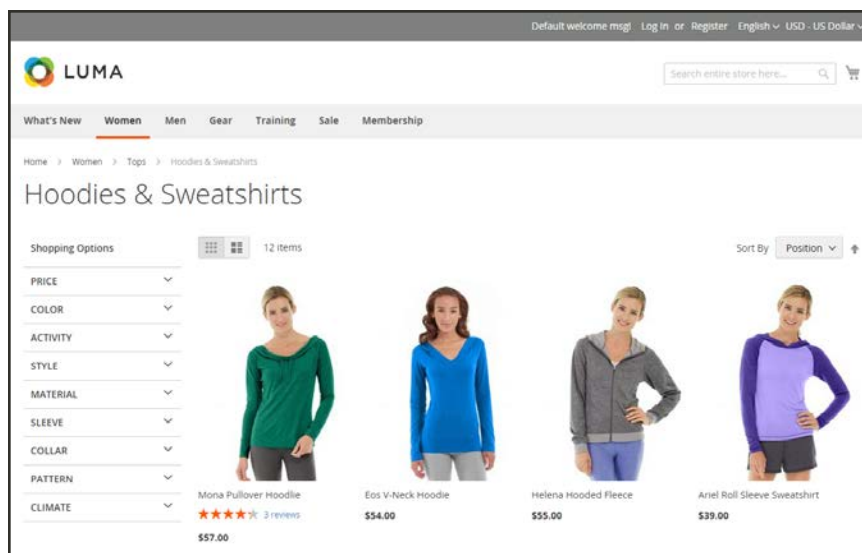


*Category Top Navigation*

## Breadcrumb Trail

A breadcrumb trail is a set of links that shows where you are in relation to other pages in the store. You can click any link in the breadcrumb trail to return to the previous page.

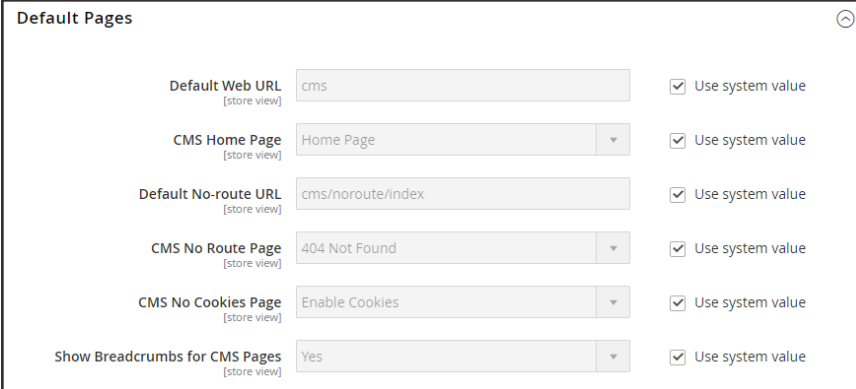
The breadcrumb trail can be configured to appear on content pages, as well as catalog pages. The format and position of the breadcrumb trail varies by theme, but it is usually located just below the header. By default, the breadcrumb trail appears on CMS pages.



*Breadcrumb Trail*

### To remove the breadcrumbs from CMS pages:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Web**. Then, do the following:
  - a. Expand the **Default Pages** section.
  - b. Clear the **Use system value** checkbox.
  - c. Set **Show Breadcrumbs for CMS Pages** to "No."
3. When complete, tap **Save Config**.

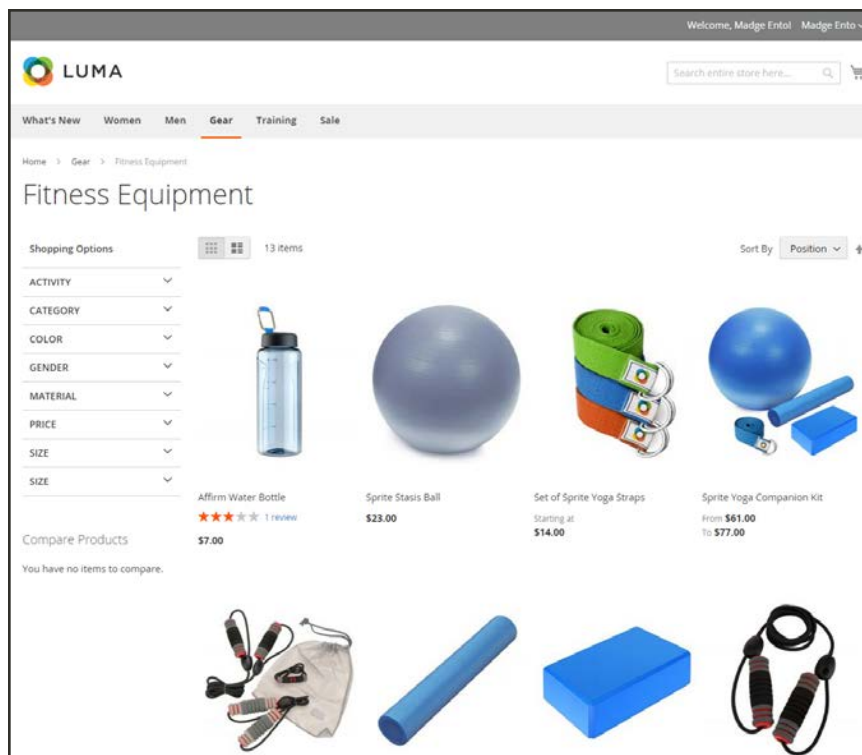


Default Pages		
Default Web URL <small>[store view]</small>	cms	<input checked="" type="checkbox"/> Use system value
CMS Home Page <small>[store view]</small>	Home Page	<input checked="" type="checkbox"/> Use system value
Default No-route URL <small>[store view]</small>	cms/noroute/index	<input checked="" type="checkbox"/> Use system value
CMS No Route Page <small>[store view]</small>	404 Not Found	<input checked="" type="checkbox"/> Use system value
CMS No Cookies Page <small>[store view]</small>	Enable Cookies	<input checked="" type="checkbox"/> Use system value
Show Breadcrumbs for CMS Pages <small>[store view]</small>	Yes	<input checked="" type="checkbox"/> Use system value

*Show Breadcrumbs for CMS Pages*


## Product Listings

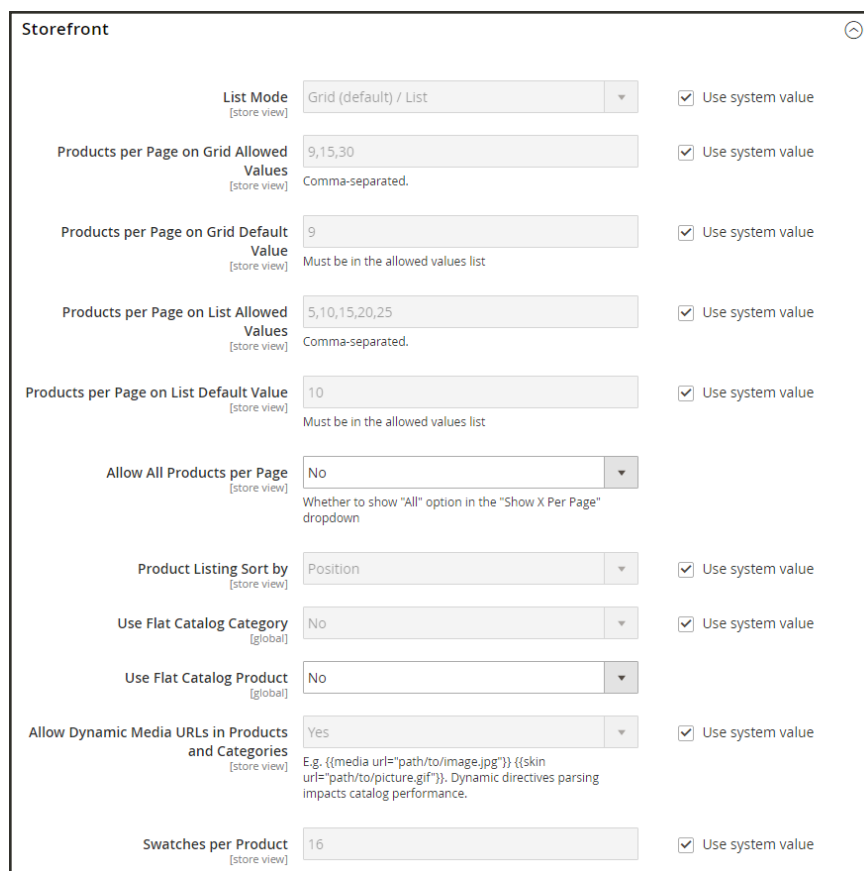
Product listings can be set to appear by default as either a list or grid. You can also determine how many products appear per page, and which attribute is used to sort the list. Each catalog page with a product list has a set of controls that can be used to sort the products, change the format of the list, sort by attribute, and advance from one page to the next.



*Products Displayed as a Grid*

## To configure product listings:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. Scroll down and in the panel on the left, tap **Catalog**. Then choose **Catalog**.
3. Expand  the **Storefront** section, and do the following:



Setting	Value	Use system value	Description
List Mode [store view]	Grid (default) / List	<input checked="" type="checkbox"/>	
Products per Page on Grid Allowed Values [store view]	9,15,30	<input checked="" type="checkbox"/>	Comma-separated.
Products per Page on Grid Default Value [store view]	9	<input checked="" type="checkbox"/>	Must be in the allowed values list
Products per Page on List Allowed Values [store view]	5,10,15,20,25	<input checked="" type="checkbox"/>	Comma-separated.
Products per Page on List Default Value [store view]	10	<input checked="" type="checkbox"/>	Must be in the allowed values list
Allow All Products per Page [store view]	No	<input checked="" type="checkbox"/>	Whether to show "All" option in the "Show X Per Page" dropdown
Product Listing Sort by [store view]	Position	<input checked="" type="checkbox"/>	
Use Flat Catalog Category [global]	No	<input checked="" type="checkbox"/>	
Use Flat Catalog Product [global]	No	<input checked="" type="checkbox"/>	
Allow Dynamic Media URLs in Products and Categories [store view]	Yes	<input checked="" type="checkbox"/>	E.g. {{media url="path/to/image.jpg"}} {{skin url="path/to/picture.gif"}}. Dynamic directives parsing impacts catalog performance.
Swatches per Product [store view]	16	<input checked="" type="checkbox"/>	

### Storefront

- a. Set the default **List Mode** to one of the following:
  - Grid Only
  - List Only
  - Grid (default) / List
  - List (default) / Grid
- b. In the **Products per Page on Grid Allowed Values** field, enter the number of products that you want to appear per page when shown in grid format. To enter a selection of values, separate each number by a comma.
- c. In the **Products per Page on Grid Default Value** field, enter the default number of products to appear in the grid per page.



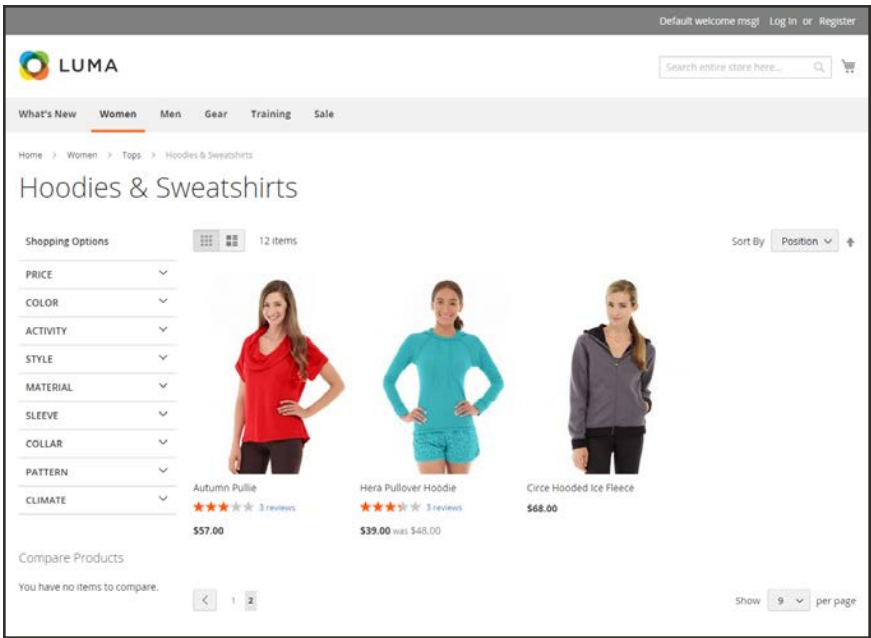
- d. In the **Products per Page on List Allowed Values** field, enter the number of products that you want to appear per page when shown in list format. To enter a selection of values, separate each number by a comma.
  - e. In the **Products per page on List Default Value** field, enter the default number of products that appear in the list, per page.
  - f. To give customers the option to list all products, set **Allow All Products on Page** to “Yes.”
  - g. Set **Product Listing Sorted** by to the default attribute that is initially used to sort the list.
4. If using a flat catalog, do the following:
  - a. To display a flat category listing of products, set **Use Flat Catalog Category** to “Yes.”
  - b. To display a flat product listing, set **Use Flat Catalog Product** to “Yes.”
5. If you want to allow dynamic references for media assets in category and product URLs, set **Allow Dynamic Media URLs in Products and Categories** to “Yes.”
6. When complete, tap **Save Config**.

## Page Controls

CONTROL	DESCRIPTION
View As	Displays the products in either a grid or list format.
Sort By	Changes the sort order of the list.
Show Per Page	Determines how many products appear per page.
Pagination Links	Navigation links to other pages.

## Pagination Controls

The Pagination settings appear at the top and bottom of the list, and control the format of the pagination links for product listings. You can set the number of links that appear in the control, and configure the Next and Previous links. For the pagination links to appear, there must be more products in the list than are allowed per page in the product list configuration.




Pagination Controls

### Pagination Controls

	<b>View As</b> Displays the list in either a Grid or List format.
Sort By <span>Position</span>	<b>Sort By</b> Changes the sort order of the list.
Show <span>9</span> per page	<b>Show Per Page</b> Determines how many products appear per page.
<span>1</span> <span>2</span>	<b>Pagination Links</b> Navigation links to other pages.

## To configure the pagination controls:

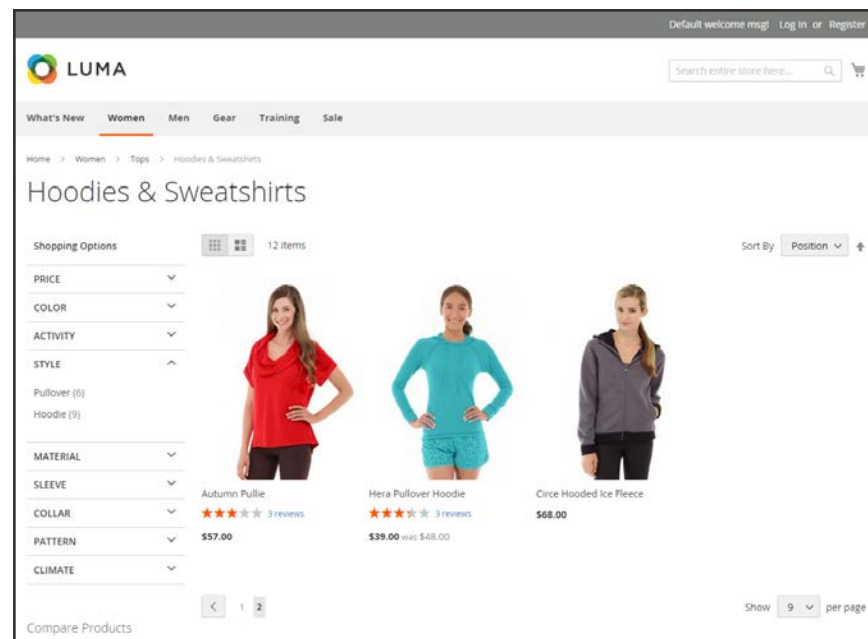
1. On the Admin sidebar, tap **Content**. Then under **Design**, choose **Configuration**.
2. Find the store view that you want to configure. Then in the **Action** column, click **Edit**.
3. Under **Other Settings**, expand  the **Pagination** section.

### *Pagination*

- a. In the **Pagination Frame** field, enter the number of links that you want to appear in the pagination control.
  - b. In the **Pagination Frame Skip** field, enter the number of links that you want to skip ahead before displaying the next set of links in the pagination control.  
  
For example, if the pagination frame has five links, and you want to jump to the next five links, how many links do you want to skip ahead? If you set this to four, then the last link from the previous set will be the first link in the next set.
  - c. In the **Anchor Text for Previous** field, enter the text that you want to appear for the Previous link. Leave blank to use the default arrow.
  - d. In the **Anchor Text for Next** field, enter the text that you want to appear for the Next link. Leave blank to use the default arrow.
4. When complete, tap **Save Config**.

## Layered Navigation

Layered navigation makes it easy to find products based on category, price range, or any other available attribute. Layered navigation usually appears in the left column of search results and category pages and sometimes on the home page. The standard navigation includes a “Shop By” list of categories and price range. You can configure the display of layered navigation, including product count and price range.

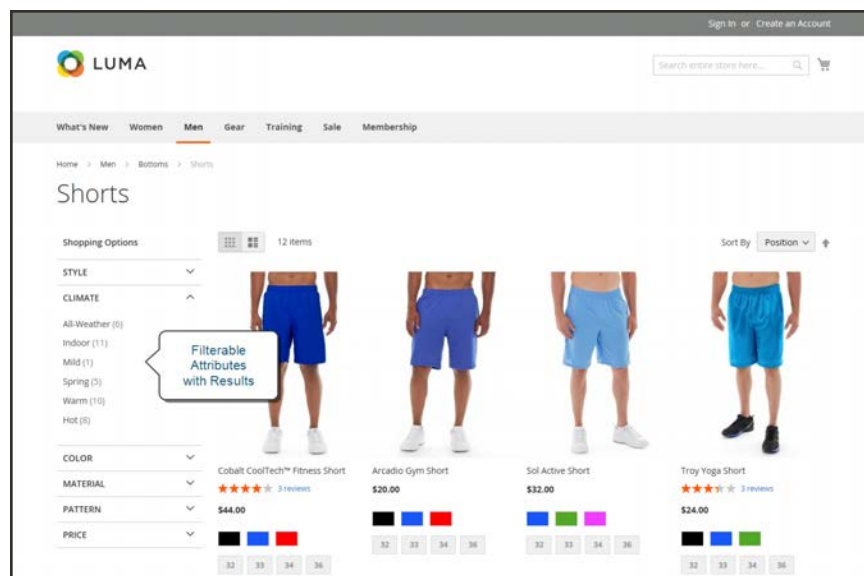


*Layered Navigation by Category and Price*

## Filterable Attributes

Layered navigation can be used to search for products by category or by attribute. For example, when a shopper chooses the Mens/Shorts category from the top navigation, the initial results include all products in the category. The list can be filtered further by choosing a specific style, climate, color, material, pattern, or price—or a combination of values. Filterable attributes appear in an expanding section that lists each attribute value. As an option, the list of products with matching results can be configured to include products with, or without, a match.

The attribute properties, combined with the product input type determines which attributes can be used for layered navigation. Layered navigation is available only for “**anchor**” categories, but can also be added to search results pages. The Catalog Input Type for Store Owner property of each attribute must be set to “Dropdown,” “Multiple Select,” or “Price.” To make the attributes filterable, the Use in Layered Navigation property of each must be set to either “Filterable (with results)” or “Filterable (no results).”



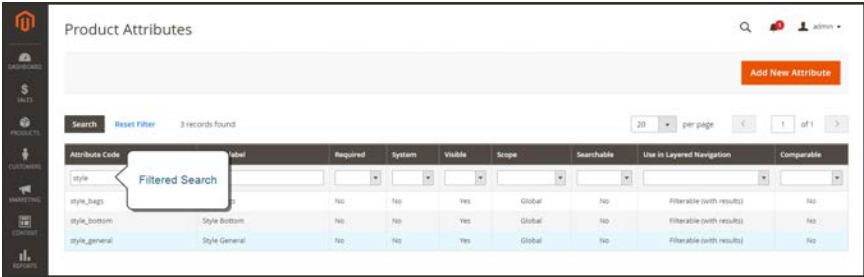
*Filterable Attributes In Layered Navigation*

The following instructions show how to set up basic layered navigation with filterable attributes. For advanced layered navigation with price steps, see: [Price Navigation](#).

**Process Overview:**  
Step 1: [Set Up the Attribute Properties](#)  
Step 2: [Make the Category an Anchor](#)  
Step 3: [Test the Results](#)

Step 1: **Set Up the Attribute Properties**

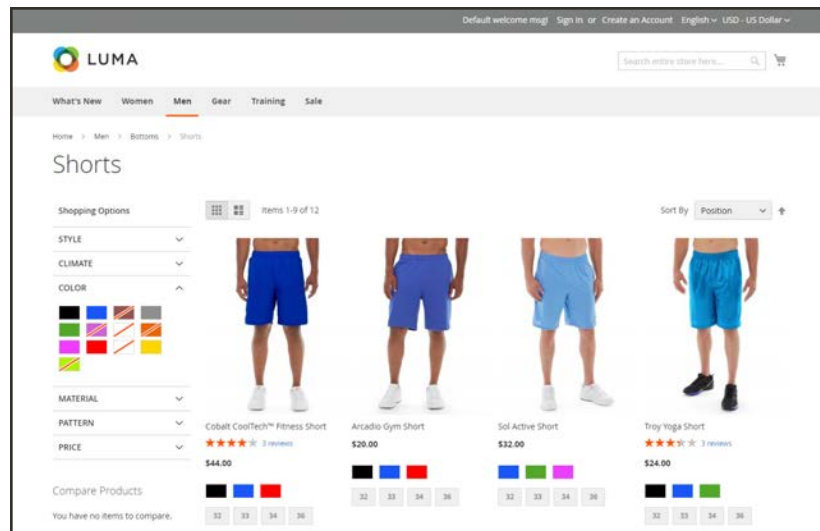
1. On the Admin sidebar, tap **Stores**. Then under **Attributes**, choose **Product**.
2. Find the attribute in the list, and open in edit mode. Then, do the following:



Filtered Search on Attribute Code

- a. In the panel on the left, choose **Storefront Properties**. Then, set **Use In Layered Navigation** to one of the following:

Filterable (with results)	Layered navigation includes only those filters for which matching products can be found. Any attribute value that already applies to all products shown in the list does not appear as an available filter. Attribute values with a count of zero (0) product matches are also omitted from the list of available filters.  The filtered list of products includes only those that match the filter. The products list is updated only if the selected filter(s) change what is currently shown.
Filterable (no results)	Layered navigation includes filters for all available attribute values and their product counts, including those with zero (0) product matches. If the attribute value is a swatch, the value appears as a filter, but is crossed out.



*Filterable Swatch Value with No Results*

- b. Set **Use In Search Results Layered Navigation** to “Yes.”

**New Product Attribute**

← Back   Reset   Save and Continue Edit   **Save Attribute**

**ATTRIBUTE INFORMATION**

Properties  
Manage Labels  
**Storefront Properties**

**Storefront Properties**

Use in Search: No

Comparable on Storefront: No

Use in Layered Navigation: No  
Can be used only with catalog input type Dropdown, Multiple Select and Price

Use in Search Results Layered Navigation: No  
Can be used only with catalog input type Dropdown, Multiple Select and Price

Position:   
Position of attribute in layered navigation block


Use for Promo Rule Conditions: No

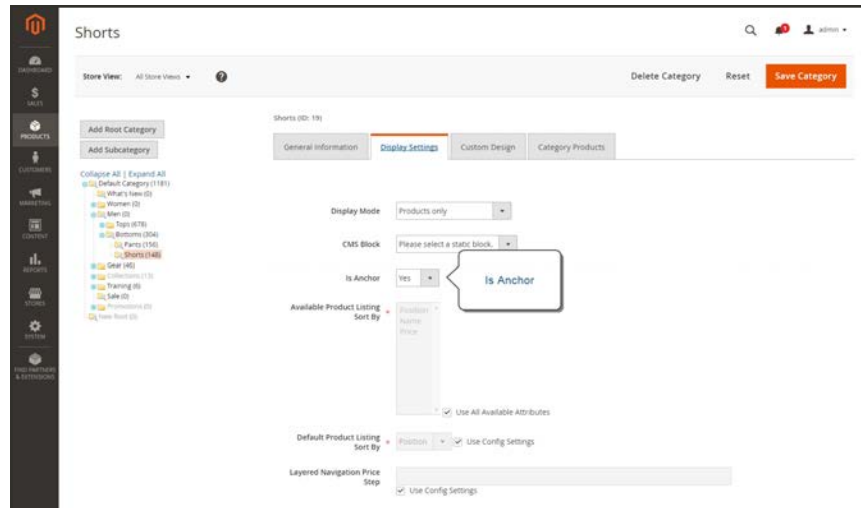
Allow HTML Tags on Storefront: Yes

*Storefront Properties*

3. Repeat these steps for each attribute that you want to include in layered navigation.

## Step 2: Make the Category an Anchor

1. On the Admin sidebar, tap **Products**. Then under **Inventory** choose **Categories**.
2. In the categories tree on the left, select the category where you want to use layered navigation.
3. Expand  the **Display Settings** section. Then, set **Anchor** to “Yes.”
4. Tap **Save**.



*Category Display Settings*

## Step 3: Test the Results

To test the setting, go to your store and navigate to the category from the main menu. The selection of filterable attributes appears in the layered navigation of the category page.



## Price Navigation

Price navigation can be used to distribute products by price range in layered navigation. You can also split each range in intervals. There are ways to calculate price navigation:

- Automatic (Equalize Price Ranges)
- Automatic (Equalize Product Counts)
- Manual


With the first two methods, the navigation steps are calculated automatically. The manual method lets you specify a division limit for price intervals. The following example shows the difference between price navigation steps of 10 and 100.

Iterative splitting provides the best distribution of products among price ranges. With iterative splitting, after choosing the \$0.00-\$99 range, the customer can drill-down through several sub-ranges of prices. Price-range splitting stops when the number of products reaches the threshold set by the Interval Division Limit.

### Example: Price Navigation Steps

PRICE STEP BY 10	PRICE STEP BY 100
\$20.00 - \$29.99 (1)	\$0.00 - \$99.99 (4)
\$30.00 - \$39.99 (2)	\$100 - \$199.99 (5)
\$70.00 - \$79.99 (1)	\$400.00 - \$499.99 (2)
\$100.00 - \$109.99 (1)	\$700.00 and above (1)
\$120.00 - \$129.99 (2)	
\$150.00 - \$159.99 (1)	
\$180.00 - \$189.99 (1)	
\$420.00 - \$429.99 (1)	
\$440.00 - \$449.99 (1)	
\$710.00 and above (1)	

## To configure price navigation:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Catalog**.
3. Expand  the **Layered Navigation** section. Then, do the following:
  - a. By default, **Display Product Count** is set to “Yes.” To change the setting, first clear the **Use system value** checkbox.
  - b. Set **Price Navigation Steps Calculation** to one of the following methods:



The screenshot shows the 'Layered Navigation' configuration panel. It has two main settings: 'Display Product Count' with a dropdown set to 'Yes' and a checked 'Use system value' checkbox; and 'Price Navigation Step Calculation' with a dropdown set to 'Automatic (equalize price ranges)' and a checked 'Use system value' checkbox.

### *Layered Navigation*

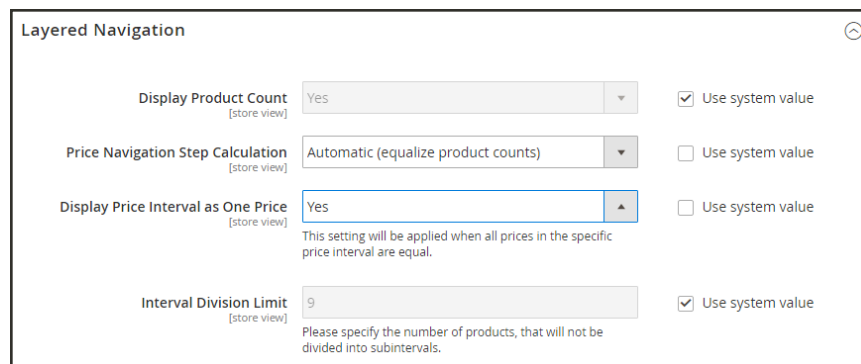
## Method 1: Automatic (equalize price ranges)

Leave **Price Navigation Steps Calculation** set to the default, “Automatic (Equalize Price Ranges.)” This setting uses the standard algorithm for price navigation.

## Method 2: Automatic (equalize product counts)

To change the value of any of the following fields, first clear the **Use system value** checkbox.

1. Set **Price Navigation Steps Calculation** to “Automatic (equalize product counts).”
2. To display a single price when multiple products with the same price, set **Display Price Interval as One Price** to “Yes.”
3. In the **Interval Division Limit** field, enter the threshold for a number of products within a price range. The range cannot be further split beyond this limit. The default value is 9.



The screenshot shows the 'Layered Navigation' configuration panel with the following settings: 'Display Product Count' is 'Yes' with 'Use system value' checked; 'Price Navigation Step Calculation' is 'Automatic (equalize product counts)' with 'Use system value' unchecked; 'Display Price Interval as One Price' is 'Yes' with 'Use system value' unchecked and a note: 'This setting will be applied when all prices in the specific price interval are equal.'; and 'Interval Division Limit' is '9' with 'Use system value' checked and a note: 'Please specify the number of products, that will not be divided into subintervals.'

### *Automatic (equalize product counts)*

Method 3: **Manual**

To change the value of any of the following fields, first clear the **Use system value** checkbox.

- 1. Set **Price Navigation Steps Calculation** to “Manual.”
- 2. Enter a value to determine the **Default Price Navigation Step**.
- 3. Enter the **Maximum Number of Price Intervals** allowed, up to 100.

Layered Navigation

Display Product Count

Yes

Price Navigation Step Calculation

Manual

Default Price Navigation Step

100

Maximum Number of Price Intervals

10

☒ Use system value

☐ Use system value

☒ Use system value

☒ Use system value

Maximum number of price intervals is 100

Manual

- 4. When complete, tap **Save Config**.

## Configuring Layered Navigation

The layered navigation configuration determines if a product count appears in parentheses after each attribute, and the size of the step calculation that is used in price navigation.

### To configure layered navigation:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, expand the **Catalog** section. Then choose **Catalog**.
3. Expand the **Layered Navigation** section, and do the following:



The screenshot shows the 'Layered Navigation' configuration panel. It has a title 'Layered Navigation' and a close button. There are two main settings:

Setting	Value	Use system value
Display Product Count <small>[store view]</small>	Yes	<input checked="" type="checkbox"/>
Price Navigation Step Calculation <small>[store view]</small>	Automatic (equalize price ranges)	<input checked="" type="checkbox"/>

### *Layered Navigation*

- a. To display the number of products found for each attribute, set **Display Product Count** to “Yes.” If necessary, first clear the **Use system value** checkbox.
  - b. Set **Price Navigation Step Calculation** to “Automatic (equalize price ranges).” If necessary, first clear the **Use system value** checkbox.
4. When complete, tap **Save Config**.





## CHAPTER 35:

# Catalog Search

Research shows that people who use search are more likely to make a purchase than those who rely on navigation alone. In fact, according to some studies, people who use search are nearly twice as likely to make a purchase. In this section of the guide, we will explore how customers search for products in your catalog, and how you can configure catalog search.

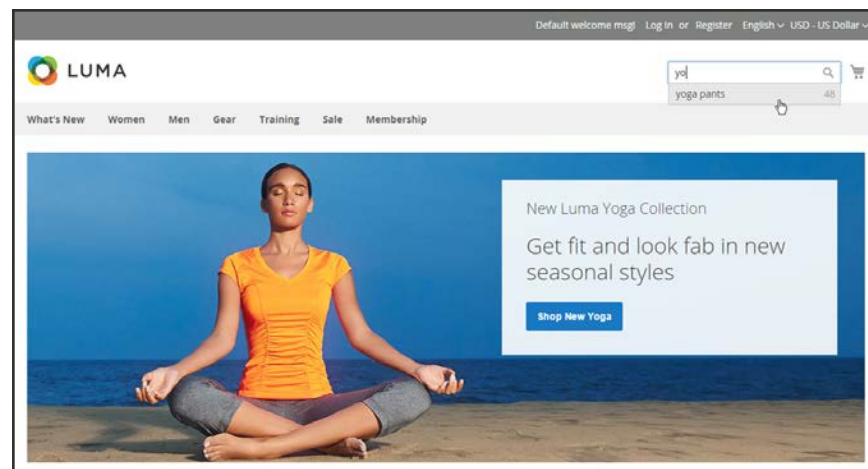
- [Quick Search](#)
- [Advanced Search](#)
- [Search Results](#)
- [Configuring Catalog Search](#)
- [Flat Catalog](#)

## Quick Search

The Search box in the header of the store helps visitors find products in your catalog. The search text can be the full or partial product name, or any other word or phrase that describes the product. The search terms that people use to find products can be managed from the Admin.

### To do a quick search:

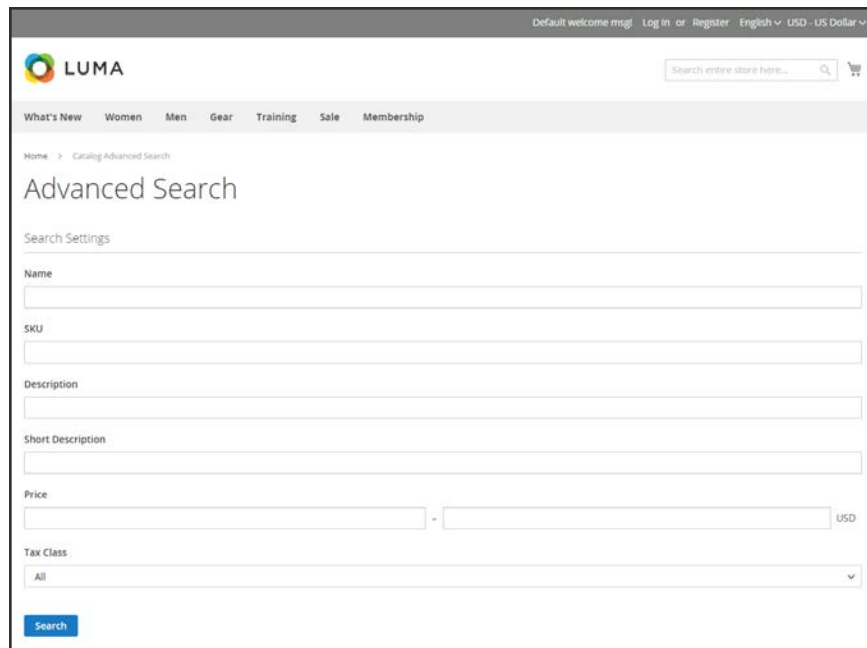
1. In the **Search** box, enter the first few letters of what you want to find.  
Any matches in the catalog appear below, with the number of results found.
2. Either press the **Enter** key or tap a result in the list of matching products.



*Search*

## Advanced Search

Advanced Search lets shoppers search the catalog based on values entered into a form. Because the form contains multiple fields, a single search can include several parameters. The result is a list of all products in the catalog that match the criteria. A link to Advanced Search is in the footer of your store.

A screenshot of the LUMA Advanced Search form. The form is titled "Advanced Search" and is located under the "Catalog Advanced Search" breadcrumb. It includes a "Search Settings" section with the following fields: "Name", "SKU", "Description", "Short Description", "Price" (with a range selector and "USD" currency), and "Tax Class" (a dropdown menu set to "All"). A blue "Search" button is at the bottom left of the form. The top of the page shows the LUMA logo, navigation links (What's New, Women, Men, Gear, Training, Sale, Membership), and a search bar with the text "Search entire store here...".

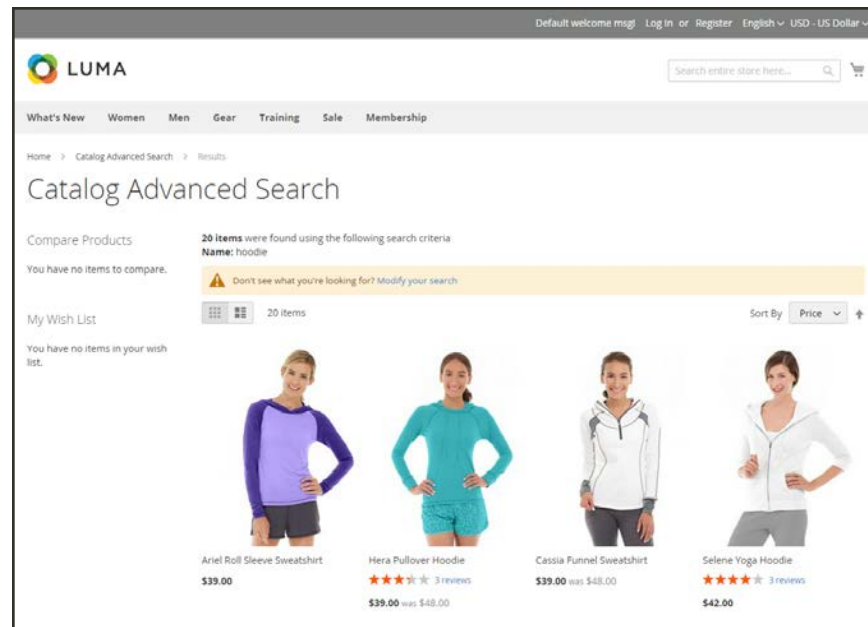
*Advanced Search*

Each field in the form corresponds to an attribute from your product catalog. To add a field, set the frontend properties of the attribute to “Include in Advanced Search.” As a best practice, include only the fields that customers are most likely to use to find a product, because having too many will slow down the search.



### To use advanced search:

1. In the footer of the store, click **Advanced Search**.
2. In the Advanced Search form, full or partial values in as many fields as necessary.
3. Tap **Search** to display the results.



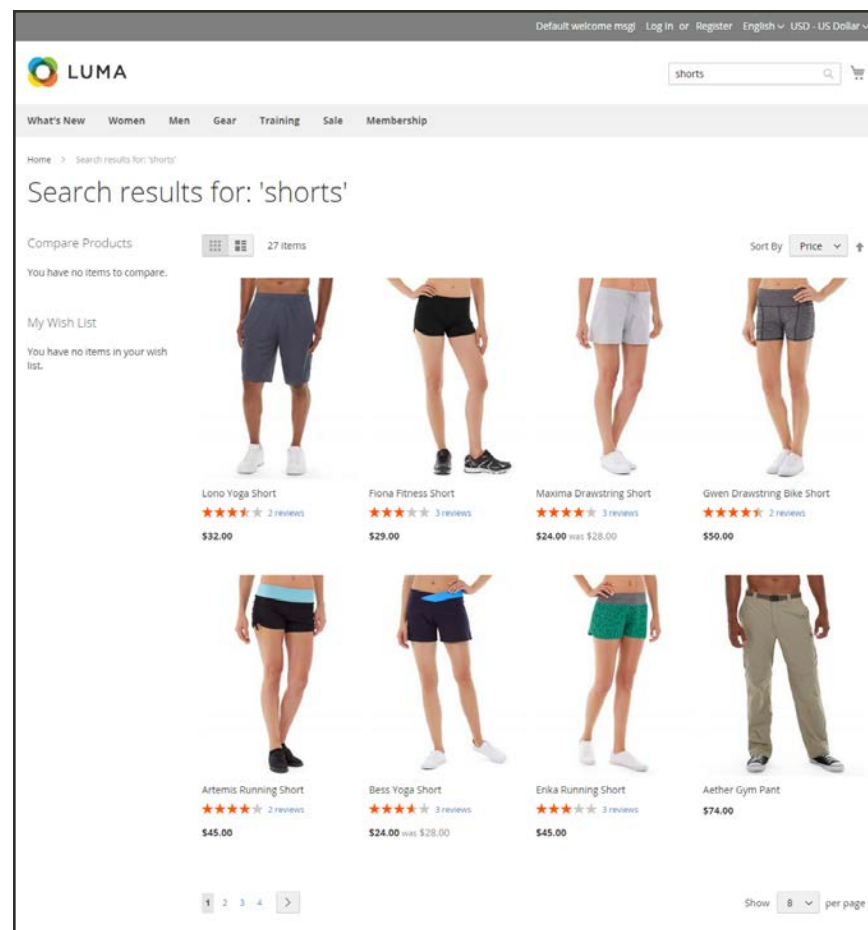
*Search Results*

4. If you don't see what you are looking for in the search results, tap **Modify your search** and try another combination of criteria.

## Search Results

The Search Results list includes all products that match the search criteria entered in the Quick Search box or the Advanced Search form. Every product list in the catalog has essentially the same controls. The only difference is that one is the result of a search query, and the other is the result of **navigation**.

The results can be formatted as either a grid or list, and sorted by a selection of attributes. **Pagination** controls appear if there are more products than fit on the page, and are used to move from one page to the next. The number of records per page is determined by the Catalog Frontend configuration. To learn more, see **Product Listings**.



*Search Results with Pagination Controls*

## Weighted Search

Product attributes that are enabled for catalog search can be assigned a weight to give them a higher value in search results. Attributes with a greater weight are returned before those with a lower weight. For example, if there are two attributes in the system, “color” with a search weight of 3 and “description” with a search weight of 1. A search for the word “red,” returns a list of products with a color attribute value of “red,” but does not return products with descriptions that contain the word “red.” In this example, the color attribute has a greater weight than the description attribute.



*Search Weight*

### To set the search weight properties of an attribute:

1. On the Admin sidebar, tap **Stores**. Then under **Attributes**, choose **Product**.
2. Find the attribute in the list, and open in edit mode.
3. In the panel on the left, choose **Storefront Properties**. Then, do the following:
  - a. To include the attribute in search queries, set **Use in Search** to “Yes.”
  - b. To establish the search value of the attribute, set **Search Weight** to a number from 1 to 10, where 10 has the highest priority. If no value is entered, all attributes have a search weight of 1.
4. When complete, tap **Save Attribute** button.

## Configuring Catalog Search

By default, Magento uses a fulltext MySQL search engine. The available options depend on the search engine that is configured for your Magento installation.

### MySQL

---

MySQL is the default search engine used by Magento Commerce.

### Elasticsearch

---

Elasticsearch is a powerful and highly scalable distributed search engine that is used by many industry leaders with high-volume sites.

### Solr

---

Solr is not included in a standard Magento installation, and must be installed separately. The Solr configuration has a slightly different set of options and features.

## MySQL

MySQL is the default search engine used by Magento Commerce. By adjusting the Catalog Search configuration, you can control the behavior of the search operations and determine the size of valid query text and the display of search recommendations.

The screenshot shows the 'Catalog Search' configuration panel. It contains the following settings:

- Minimal Query Length**: 1 (with a 'Use system value' checkbox checked)
- Maximum Query Length**: 128 (with a 'Use system value' checkbox checked)
- Search Engine**: MySQL (with a 'Use system value' checkbox checked)
- Enable Search Suggestions**: Yes (with a note: 'When you enable this option your site may slow down.')
- Search Suggestions Count**: 2
- Show Results Count for Each Suggestion**: No (with a note: 'When you enable this option your site may slow down.')
- Enable Search Recommendations**: Yes (with a note: 'When you enable this option your site may slow down.')
- Search Recommendations Count**: 5
- Show Results Count for Each Recommendation**: No

### *MySQL Configuration*

#### To configure MySQL search:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Catalog**.
3. Expand ☑ the **Catalog Search** section.
4. To limit the length and word count of search query text, do the following:
  - a. Set **Minimal Query Length** to the minimum number of characters that can be submitted in a query.
  - b. Set **Maximum Query Length** to the maximum number of characters that can be submitted in a query.
5. Accept the default, **Search Engine**, “MySQL.”
6. To display search suggestions, set **Enable Search Suggestions** to “Yes.” Then, do the following:
  - a. In the **Search Suggestion Count** field, enter the number of suggestions to offer for each search term that returns no results. The default is 2.
  - b. To display the number of search results for each suggested term, set **Show Results Count for Each Suggestion** to “Yes.”

7. To offer search recommendations, set **Enable Search Recommendations** to “Yes.” Then, do the following:
  - a. In the **Search Recommendations Count** field, enter the number of recommendations that you want to offer. The default is 5.
  - a. To display the number of results for each recommendation, set **Show Results Count for Each Recommendation** to “Yes.”
8. When complete, tap **Save Config**.

## Elasticsearch

Elasticsearch is a powerful and highly scalable distributed search engine that is used by such high-volume sites as eBay, Wikipedia, and GitHub. The implementation of Elasticsearch for Magento Enterprise Edition 2.1 includes both search suggestions and recommendations. For installation instructions, see Elasticsearch in the Magento Developer Documentation.

### Step 1: Set the Query Length

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Catalog**.
3. Expand ☑ the **Catalog Search** section. Then, do the following:



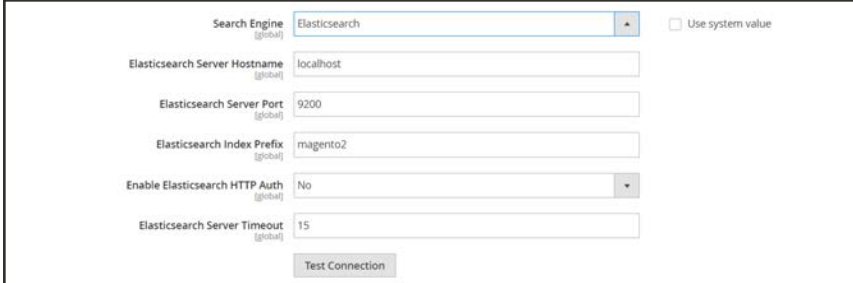
The screenshot shows the 'Catalog Search' configuration panel. It contains two input fields: 'Minimal Query Length' with a value of '1' and 'Maximum Query Length' with a value of '128'. Both fields have a 'Use system value' checkbox checked to their right.

#### *Elasticsearch Query Length*

- a. In the **Minimal Query Length** field, enter the minimum number of characters that can be submitted in a query.
- b. In the **Maximum Query Length** field, enter the maximum number of characters that can be submitted in a query.

### Step 2: Configure the Elasticsearch Connection

1. After the **Search Engine** field, clear the **Use system value** checkbox. Then, set **Search Engine** to “Elasticsearch,” and do the following:



The screenshot shows the 'Elasticsearch Connection Settings' configuration panel. It includes the following fields and controls:
 

- Search Engine**: A dropdown menu set to 'Elasticsearch' with a 'Use system value' checkbox to its right.
- Elasticsearch Server Hostname**: A text input field with 'localhost' entered.
- Elasticsearch Server Port**: A text input field with '9200' entered.
- Elasticsearch Index Prefix**: A text input field with 'magento2' entered.
- Enable Elasticsearch HTTP Auth**: A dropdown menu set to 'No'.
- Elasticsearch Server Timeout**: A text input field with '15' entered.
- Test Connection**: A button at the bottom of the panel.

#### *Elasticsearch Connection Settings*

- a. Enter the **Elasticsearch Server Hostname**. The default is: localhost.
- b. Enter the **Elasticsearch Server Port**.

- c. In the **Elasticsearch Index Prefix** field, enter a prefix to identify the Elasticsearch index. For example: Magento2.
  - d. Set **Enable Elasticsearch HTTP Auth** to “Yes” to use HTTP authentication to prompt for a username and password to access Elasticsearch Server.
  - e. In the **Elasticsearch Server Timeout** field, enter the number of seconds before the system times out. The default is: 15.
2. To verify the configuration, tap **Test Connection**.

### Step 3: Configure Suggestions and Recommendations

Search suggestions and recommendations can impact server performance.

1. Set **Enable Search Suggestions** to “Yes.” Then, do the following:

Enable Search Suggestions <small>(store view)</small>	Yes	<small>When you enable this option your site may slow down.</small>
Search Suggestions Count <small>(store view)</small>	2	
Show Results Count for Each Suggestion <small>(store view)</small>	No	<small>When you enable this option your site may slow down.</small>
Enable Search Recommendations <small>(store view)</small>	Yes	<small>When you enable this option your site may slow down.</small>
Search Recommendations Count <small>(store view)</small>	5	
Show Results Count for Each Recommendation <small>(store view)</small>	No	

#### *Elasticsearch Suggestion and Recommendation Settings*

- a. In the **Search Suggestions Count** field, enter the number of search suggestions to offer.
  - b. To show the number of results found for each suggestion, set **Show Results for Each Suggestion** to “Yes.”
2. To offer recommendations, set **Enable Search Recommendations** to “Yes.” Then, do the following:
    - a. In the **Search Recommendation Count** field, enter the number of recommendations to offer.
    - b. To show the number of results found for each recommendation, set **Show Results Count for Each Recommendation** to “Yes.”
  3. When complete, tap **Save Config**.



## Solr

Solr is a standalone, enterprise-scale search server that communicates easily with applications. Because Solr is highly scalable, it is used to power some of the world’s most high-traffic Internet sites. This guide includes installation instructions for system administrators, as well configuration instructions and “how to” help for store administrators.

Solr provides improved search performance and search results relevancy, support for spelling, synonyms and stop words, and improved layered navigation performance. Solr is especially recommended for sites with heavy traffic and search loads. Products are added to the search engine index as each product is saved in the Admin, so the index is kept up to date without any need for manual intervention.

All of the attributes that are available for layered navigation are added to Solr index. As a result, Solr can also be used to generate the layered navigation. To add these attributes to Solr search results, the store administrator must enable Solr for catalog navigation.

The following instructions show how to configure the Solr search engine after it has been installed on your server. Solr can reside on the same server as Magento, or on a different server. After the installation, you must complete the configuration from the Admin to establish the connection.

### Step 1: Establish the Connection

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Catalog**.
3. Expand ☑ the **Catalog Search** section. Then, do the following:
  - a. Beginning with the third field, clear the **Use system value** checkbox. Then, set **Search Engine** to “Solr.”

The screenshot shows the 'Catalog Search' configuration section in the Magento Admin. The 'Search Engine' dropdown is set to 'Solr'. Below it, several fields are visible: 'Solr Server Hostname' (localhost), 'Solr Server Port' (8983), 'Solr Server Username' (admin), 'Solr Server Password' (empty), 'Solr Server Timeout' (15), 'Solr Server Path' (solr), and 'Indexation Mode' (Final commit). A 'Test Connection' button is at the bottom. A 'Use system value' checkbox is also present next to the Search Engine dropdown.

### Configuring Solr Connection

- b. Enter the fully-qualified **Solr Server Hostname** or **IP address**. The default is localhost.

- c. Enter the number of the port that is assigned as the **Solr Server Port**.
- d. Enter the **Solr Server Username** and **Solr Server Password**.
- e. In the **Solr Server Timeout** field, enter the number of seconds of inactivity that can pass before the connection times out. The default is 15.
- f. For a standard Solr installation, you can accept the default **Solr Server Path**. For a custom deployment, enter the correct path to the installation. The default path is solr.
- g. Set **Indexation Mode** to one of the following:

Final commit	(Default) Offers better performance than a partial commit, and users see the results immediately. Indexing begins after all unneeded data is removed and new data is added.
Partial commit	As content is gradually reindexed, users see only the indexed results. All content is removed after reindexing.
Engine autocommit	Content is put into the index queue but is not committed. To use autocommit, you must configure Solr to commit at regular intervals (for example, every 5 minutes) or when a certain number of uncommitted items is reached.

- h. To verify the installation, tap **Test Connection**.
4. When the connection is established, tap **Save Config**. Then, continue to the next step to complete the configuration.

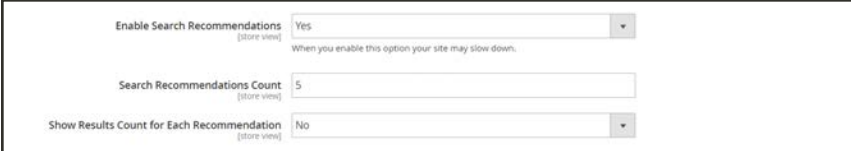
## Step 2: Configure Solr Search Features

1. If you want to change the default query length settings, do the following:
  - a. Beginning with the first field, clear the **Use system value** checkbox. Then, set **Minimal Query Length** to the minimum number of characters that can be submitted in a query.
  - b. Set **Maximum Query Length** to the maximum number of characters that can be submitted in a query.

The screenshot shows a configuration window titled "Catalog Search" with a close button in the top right corner. It contains two input fields, each with a "Use system value" checkbox to its right. The first field is labeled "Minimal Query Length" with a "(store view)" link below it; the input value is "1". The second field is labeled "Maximum Query Length" with a "(store view)" link below it; the input value is "128".

### Query Length


2. Continuing below the Test Connection button, set **Enable Search Suggestions** to "Yes." Then, do the following:



The screenshot shows a configuration panel for search suggestions. It contains three settings: 'Enable Search Recommendations' set to 'Yes' with a note 'When you enable this option your site may slow down.', 'Search Recommendations Count' set to '5', and 'Show Results Count for Each Recommendation' set to 'No'. Each setting has a '(store view)' link below it.

### *Search Suggestions*

- a. In the **Search Suggestion Count** field, enter the number of suggestions to offer for each query that returns no results. The default is 2.
  - b. To display the number of search results for each suggested term, set **Show Results Count for Each Suggestion** to “Yes.”
3. To offer search recommendations, set **Enable Search Recommendations** to “Yes.” Then, do the following:



The screenshot shows a configuration panel for search recommendations. It contains three settings: 'Enable Search Recommendations' set to 'Yes' with a note 'When you enable this option your site may slow down.', 'Search Recommendations Count' set to '5', and 'Show Results Count for Each Recommendation' set to 'No'. Each setting has a '(store view)' link below it.

### *Search Recommendations*

- a. In the **Search Recommendations Count** field, enter the number of recommendations that you want to offer. The default is 5.
  - b. To display the number of results for each recommendation, set **Show Results Count for Each Recommendation** to “Yes.”
4. When complete, tap **Save Config.**



## CHAPTER 36:

# Search Terms

You can learn what your customers are looking for by examining the search terms they use to find products in your store. If enough people look for a product that you don't carry, perhaps it's time to add it to your catalog. Meanwhile, rather than have them leave them empty handed, why not redirect them to another product in your catalog? Here are a few ways you can leverage customer search terms:

### Landing Page

---

The landing page for a search term can be a content page, a category page, a product detail page, or even a page on a different site.

### Synonyms

---

One way to improve the effectiveness of catalog search is to include different terms that people may use to describe the same item. You don't want to lose a sale just because someone is looking for a "sofa," and your product is listed as a "couch." You can capture a broader range of search terms by entering the words, "sofa" "davenport," and "loveseat" as synonyms for "couch," and direct them to the same landing page.

### Misspelled Words

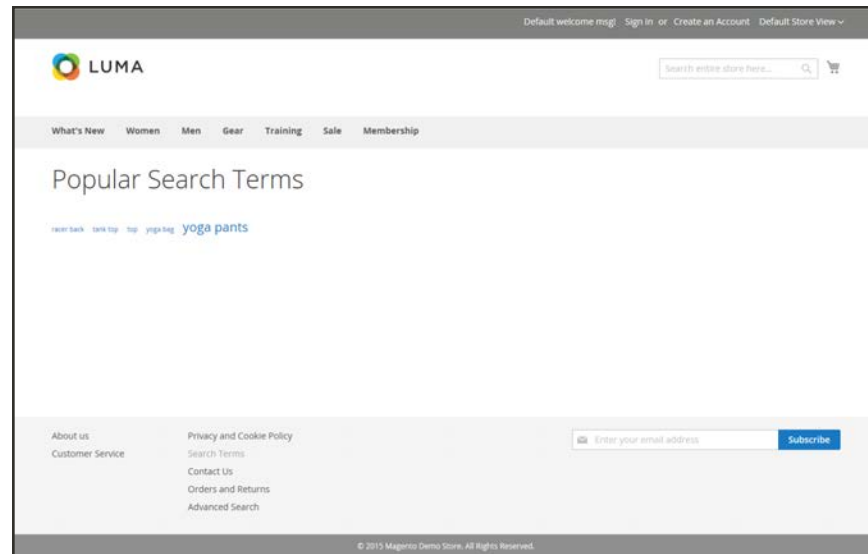
---

Use search terms to capture common misspellings and redirect them to the appropriate page. For example, if you sell wrought iron patio furniture, you know that many people misspell the term as "rod iron," or even "rot iron." You can enter each misspelled word as a search term, and make them synonyms for "wrought iron." Even though the word is misspelled, the search will be directed to the page for "wrought iron."

## Popular Search Terms


The Search Terms link in the footer of your store displays the search terms used by visitors to your store, ranked by popularity. Search terms appear in a “tag cloud” format, where the size of the text indicates the popularity of the term.

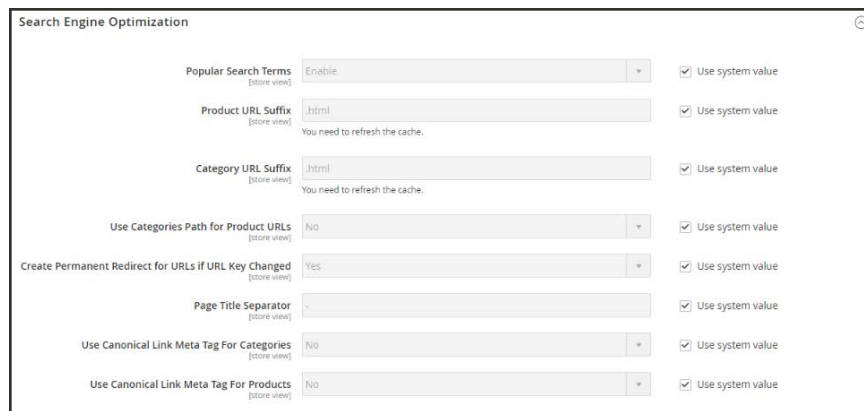
By default, Popular Search Terms is enabled as a search engine optimization tool, but has no direct connection to the catalog search process. Because the Search Terms page is indexed by search engines, any terms on the page can help improve your search engine ranking and the visibility of your store. The URL of the Popular Search Terms page is:  
`mystore.com/search/term/popular/`



*Popular Search Terms*

### To configure Popular Search Terms:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Catalog**.
3. Expand  the **Search Engine Optimization** section.
4. Clear the **Use system value** checkbox. Then, set **Popular Search Terms** as needed.
5. When complete, tap **Save Config.**



The screenshot shows the 'Search Engine Optimization' configuration panel. It contains several settings, each with a dropdown menu and a 'Use system value' checkbox. The settings are: 'Popular Search Terms' (set to 'Enable'), 'Product URL Suffix' (set to '.html'), 'Category URL Suffix' (set to '.html'), 'Use Categories Path for Product URLs' (set to 'No'), 'Create Permanent Redirect for URLs if URL Key Changed' (set to 'Yes'), 'Page Title Separator' (set to '-'), 'Use Canonical Link Meta Tag For Categories' (set to 'No'), and 'Use Canonical Link Meta Tag For Products' (set to 'No'). The 'Use system value' checkbox is checked for all settings except 'Popular Search Terms'.

Setting	Value	Use system value
Popular Search Terms	Enable	<input checked="" type="checkbox"/>
Product URL Suffix	.html	<input checked="" type="checkbox"/>
Category URL Suffix	.html	<input checked="" type="checkbox"/>
Use Categories Path for Product URLs	No	<input checked="" type="checkbox"/>
Create Permanent Redirect for URLs if URL Key Changed	Yes	<input checked="" type="checkbox"/>
Page Title Separator	-	<input checked="" type="checkbox"/>
Use Canonical Link Meta Tag For Categories	No	<input checked="" type="checkbox"/>
Use Canonical Link Meta Tag For Products	No	<input checked="" type="checkbox"/>

### *Search Engine Optimization*

## Adding Search Terms

As you learn new words that people use to search for products in your catalog, you can add them to your search terms list to direct people to the most closely matching products in your catalog.

**Search Terms**

Search [Reset Filter](#)

Actions 5 records found 20 per page 1 of 1

	Search Query	Store	Results	Uses	Redirect URL	Suggested Terms	Action
<input type="checkbox"/>	tee shirt racer back	Main Website Main Website Store English	62	1		yes	<a href="#">Edit</a>
<input type="checkbox"/>	hoodie	Main Website Main Website Store English	20	2		yes	<a href="#">Edit</a>
<input type="checkbox"/>	gray hoodie	Main Website Main Website Store English	54	1		yes	<a href="#">Edit</a>
<input type="checkbox"/>	womens hoodie	Main Website Main Website Store English	20	1		yes	<a href="#">Edit</a>
<input type="checkbox"/>	racer back	Main Website Main Website Store English	39	2		yes	<a href="#">Edit</a>

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*Search Terms*

### To add a new search term:

1. On the Admin sidebar, tap **Marketing**. Then under **SEO & Search**, choose **Search Terms**.
2. Tap **Add New Search Term**. Then, do the following:

**New Search**

← Back [Reset](#) [Save Search](#)

**General Information**

Search Query \*

Store \*

Redirect URL

ex. http://domain.com

Display in Suggested Terms ☐

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*General Information*

- a. Under General Information in the **Search Query** box, type the word or phrase that you want to add as a new search term.
  - b. If your store is available in multiple languages, choose the applicable **Store** view.
  - c. To redirect the search results to another page in your store, or to another website, enter the full URL of the target page in the **Redirect URL** field.
  - d. If you want this term to be available for use as a suggestion whenever a search returns no results, set **Display in Suggested Terms** to “Yes.”
3. When complete, tap **Save Search**.

### To edit a search term:

1. In the Search Terms grid, click the row of any record to open the search term in edit mode.
2. Make the necessary changes.
3. When complete, tap **Save Search**.

### To delete a search term:

1. In the list, mark the checkbox of the term to be deleted.
2. In the upper-left corner of the list, set **Actions** to “Delete.”
3. When complete, tap **Submit**.



## Search Terms Report

The Search Terms report shows the number of results for each term, and the number of times (hits) the term was used. The report data can be filtered by term, store, results, and hits, and exported for further analysis.

### To view the search terms report:

1. On the Admin sidebar, tap **Reports**. Then under **Marketing**, choose **Search Terms**.
2. Use the controls to filter the report as needed.

Search Terms Report

Search Reset Filter 5 records found

Export to: CSV Export

20 per page 1 of 1

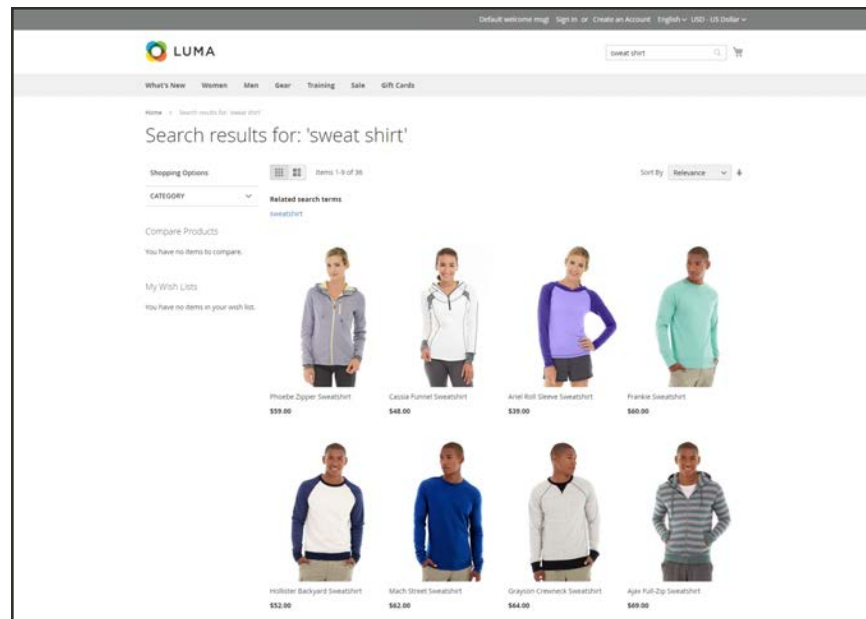
#	Search Query	Store	Results	Hits
11	racer back	Main Website Main Website Store English	39	2
7	womens hoodie	Main Website Main Website Store English	20	1
5	gray hoodie	Main Website Main Website Store English	54	1
3	hoodie	Main Website Main Website Store English	20	2
1	tee short racer back	Main Website Main Website Store English	42	1

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*Search Terms Report*

## Search Synonyms

One way to improve the effectiveness of catalog search is to include different terms that people may use to describe the same item. You don't want to lose a sale just because someone is looking for a "sofa," while your product is listed as a "couch." Or perhaps they spelled it wrong, or just differently. Is it a sweatshirt, or a sweat shirt? Maybe it's a fleece or a hoodie. You can capture a broad range of search terms by entering all the possible words a customer might use to find your products.

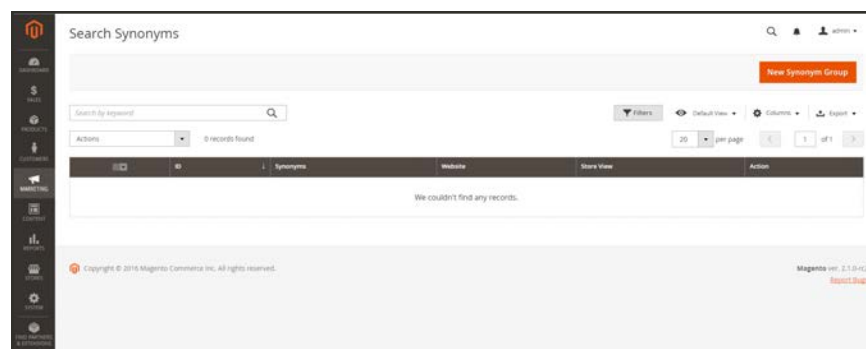


*Search Results*

### To create a new synonym group:

1. On the Admin sidebar, tap **Marketing**. Then under **SEO & Search**, choose **Search Synonyms**.

The Search Synonyms grid appears. If this is the first time you have used search synonyms, the grid will be empty.



*Search Synonyms Grid*

2. Tap **New Synonym Group**. Then, do the following:

*New Synonym Group*

- a. Set **Scope** to the store views where the synonyms apply.
  - b. Enter each synonym in the group, separated by comma. Choose words that people might use as search criteria. For example:
    - sweatshirt, sweat shirt, hoodie, fleece
    - cell phone, mobile phone, smart phone
    - couch, sofa, davenport
    - wrought iron, rot iron, rod iron
  - c. To merge these synonyms into a group with others that have the same scope, mark the **Merge existing synonyms** checkbox.
3. When complete, tap **Save Synonym Group**.

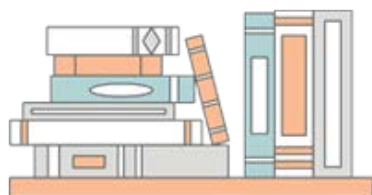
ID	Synonyms	Website	Store View	Action
1	cell phone, mobile phone, smart phone	Main Website	All Store Views	Select

*Search Synonym Group Saved*

## CHAPTER 37:

# SEO Best Practices

Search engine optimization is the practice of fine-tuning the content and presentation of a site to improve the way the pages are indexed by search engines. Magento Commerce includes a number of features to support your ongoing SEO effort.



### Commerce Resources

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See the latest [Magento eBooks](#) to gain access to expert insight and online business resources to help develop and improve your store.



### Meta Data

---

Learn more about adding and enhancing keyword-rich meta data for your site and store.



### Using a Sitemap

---

A site map improves the way your store is indexed by search engines, and is specifically designed to find pages that might be overlooked by web crawlers. A site map can be configured to index all pages and images.



## URL Rewrites

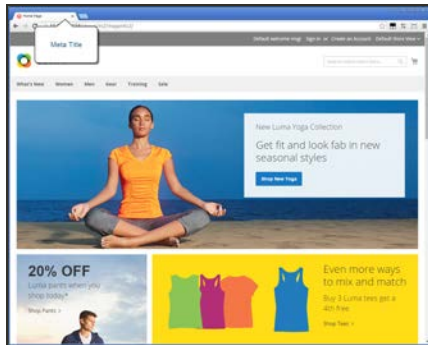
---

The URL Rewrite tool lets you change any URL that is associated with a product, category, or CMS page.

## Meta Data

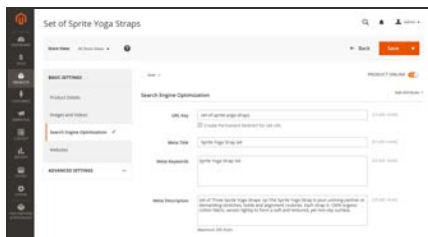
Your store is loaded with places where you can enter keyword-rich meta data to improve the way search engines index your site. While setting up your store, you might enter preliminary meta data, with the intention of finishing it later. Over time, you can fine-tune the meta data to target the buying patterns and preferences of your customers.

### Meta Tags



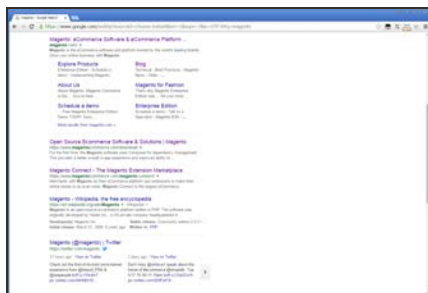
### Meta Title

The meta title appears in the title bar and tab of your browser, and search results listings. The meta title should be unique to the page, and less than seventy characters in length.



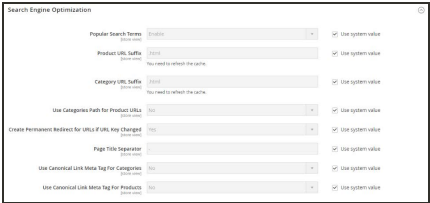
### Meta Keywords

Although some search engines ignore meta keywords, others continue to use them. The current best practice is to incorporate high-value keywords in the meta title and meta description.



### Meta Description

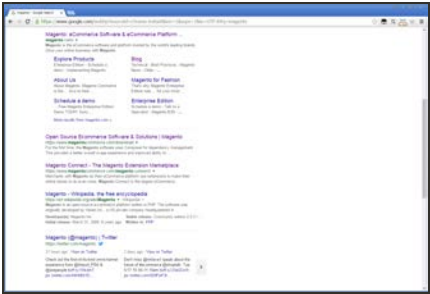
Meta descriptions provide a brief overview of the page for search results listings. Ideally, a meta description should be between 150-160 characters in length, although the field will accept up to 255 characters.



## Canonical Meta Tag

The canonical meta tag tells search engines which page to index when multiple URLs have identical or very similar content.

## Structured Data Markup



## Rich Snippets

Rich snippets provide detailed information for search results listings and other applications. By default, structured data markup that is based on the [schema.org](https://schema.org) standard is added to your store's product template. As a result, more information is available for search engines to include as “rich snippets” in product listings.

## Canonical Meta Tag

Some search engines penalize websites that have multiple URLs that point to the same content. The canonical meta tag tells search engines which page to index when multiple URLs have identical or very similar content. Using the canonical meta tag can improve your site ranking and aggregate pageviews. The canonical meta tag is placed in the <head> block of a product or category page. It provides a link to your preferred URL, so search engines will give it greater weight.

### Example 1: Category Path Creates Duplicate URLs

For example, if your catalog is configured to include the category path in product URLs, your store will generate multiple URLs that point to the same product page.

```
http://mystore.com/gear/bags/driven-backpack.html  
http://mystore.com/driven-backpack.html
```

### Example 2: Category Page Full URL

When canonical meta tags for categories are enabled, the category page of your store includes a canonical URL to the full category URL:

```
http://mystore.com/gear/bags/driven-backpack.html
```

### Example 3: Product Page Full URL

When canonical meta tags for products are enabled, the product page includes a canonical URL to the domain-name/product-url-key because product URL keys are globally unique.

```
http://mystore.com/driven-backpack.html
```

If you also include the category path in product URLs, the canonical URL remains domain-name/product-url-key. However, the product can also be accessed using its full URL, which includes the category. For example, if the product URL key is driven-backpack, and is assigned to the Gear > Bags category, the product can be accessed using either URL.

You can avoid being penalized by search engines by omitting the category from the URL, or by using the canonical meta tag to direct search engines to index either by product or category. As a best practice, it is recommended that you enable canonical meta tags for both categories and products.

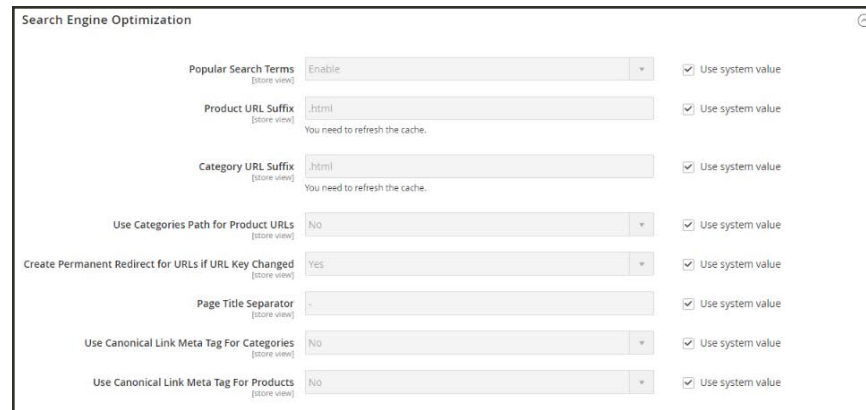
### To enable the canonical meta tag:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose elect **Configuration**.
2. In the panel on the left under **Catalog**, choose **Catalog**.



3. Expand  the **Search Engine Optimization** section.

To change any field values, you must first clear the **Use system value** checkbox after each field.



Field	Value	Use system value
Popular Search Terms	Enable	<input checked="" type="checkbox"/>
Product URL Suffix	.html	<input checked="" type="checkbox"/>
Category URL Suffix	.html	<input checked="" type="checkbox"/>
Use Categories Path for Product URLs	No	<input checked="" type="checkbox"/>
Create Permanent Redirect for URLs if URL Key Changed	Yes	<input checked="" type="checkbox"/>
Page Title Separator	-	<input checked="" type="checkbox"/>
Use Canonical Link Meta Tag For Categories	No	<input checked="" type="checkbox"/>
Use Canonical Link Meta Tag For Products	No	<input checked="" type="checkbox"/>

### *Search Engine Optimization*

4. If want search engines to index only category pages using the full category path, do the following:
  - a. Set **Use Canonical Link Meta Tag for Categories** to “Yes.”
  - b. Set **Use Canonical Link Meta Tag for Products** to “No.”
5. If you want search engines to index product pages only using the domain-name/product-url-key format, do the following:
  - a. Set **Use Canonical Link Meta Tag for Products** to “Yes.”
  - b. Set **Use Canonical Link Meta Tag for Categories** to “No.”
6. When complete, tap **Save Config**.

## Using a Sitemap

A sitemap improves the way your store is indexed by search engines, and is specifically designed to find pages that might be overlooked by web crawlers. A sitemap can be configured to index all pages and images.

When enabled, Magento creates a file called `sitemap.xml` that is saved to the root directory of your installation. The configuration gives you the ability to set the frequency of the updates, and the priority for each type of content. Your sitemap should be updated as frequently as the content on your site changes, which might be daily, weekly, or monthly.

While your site is in development, you might include instructions in the `robots.txt` file for web crawlers to avoid indexing the site. Then before the launch, you can change the instructions to allow the site to be indexed.

### Process Overview:

Step 1: [Configure and Enable the Sitemap](#)

Step 2: [Configure and Enable robots.txt \(Optional\)](#)

Step 3: [Submit Your Sitemap to Search Engines](#)

Step 4: [Restore the Previous Robot Instructions \(Optional\)](#)

### Step 1: [Configure and Enable the Sitemap](#)

Complete the [XML Sitemap configuration](#) to determine what is included, and how frequently the sitemap is updated.

### Step 2: [Configure and Enable robots.txt](#) (Optional)

Complete the [Search Engine Robots](#) configuration with instructions that direct search engines to crawl the parts of your site that you want to be indexed.

### Step 3: [Submit Your Sitemap to Search Engines](#)

You can submit your sitemap to different search engines by providing them a link to the `sitemap.xml` file in the root of your Magento installation. For more information, see the instructions for the specific search engine. Here are links to instructions for two top search engines:

- [Google](#)
- [Microsoft Bing](#)

### Step 4: [Restore Previous Robot Instructions](#) (Optional)

You can now restore either the original, or default restrictions.

## Sitemap Configuration

Your sitemap should be updated as frequently as the content on your site changes, which could be on a daily, weekly, or monthly basis. The configuration lets you set the frequency and priority for each type of content.

### Step 1: Set the Frequency and Priority of Content Updates

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **XML Sitemap**.
3. Expand ☑ the **Categories Options** section. Then, do the following:
  - a. Set **Frequency** to one of the following:
    - Always
    - Hourly
    - Daily
    - Weekly
    - Monthly
    - Yearly
    - Never
  - b. In the **Priority** field, enter a value between 0.0 and 1.0. Zero has the lowest priority.

Categories Options

Frequency (Store view) Daily ☒ Use system value

Priority (Store view) 0.5 ☒ Use system value

Valid values range from 0.0 to 1.0.

### Categories Options

4. Click to expand the **Products Options** section. Then, complete the **Frequency** and **Priority** settings as needed.
5. To determine the extent that images are included in the sitemap, set **Add Images into Sitemap** to one of the following:
  - None
  - Base Only
  - All

**Products Options**

Frequency (store view): Daily ☒ Use system value

Priority (store view): 1 ☒ Use system value  
Valid values range from 0.0 to 1.0.

Add images into Sitemap (store view): All ☒ Use system value

*Products Options*

6. Click to expand the **CMS Pages Options** section. Then, complete the **Frequency** and **Priority** settings as needed.

**CMS Pages Options**

Frequency (store view): Daily ☒ Use system value

Priority (store view): 0.25 ☒ Use system value  
Valid values range from 0.0 to 1.0.

*CMS Pages Options*

7. When complete, tap **Save Config.**

## Step 2: Complete the Generation Settings

1. Expand ☑ the **Generation Settings** section.

**Generation Settings**

Enabled (store view): No ☒ Use system value

Start Time (store view): 00 : 00 : 00

Frequency (store view): Daily

Error Email Recipient (store view):

Error Email Sender (website): General Contact ☒ Use system value


Error Email Template (website): Sitemap Generation Warnings (Default) ☒ Use system value  
Email template chosen based on theme fallback when "Default" option is selected.

*Generation Settings*

2. To generate a sitemap, set **Enabled** to "Yes." Then, do the following:
  - a. Set **Start Time** to the hour, minute and second that you want the sitemap to be updated.
  - b. Set **Frequency** to one of the following:
    - Daily
    - Weekly
    - Monthly

- c. In the **Error Email Recipient** field, enter the email address of the person who is to receive notification if an error occurs during a sitemap update.
- d. Set **Error Email Sender** to the store contact who appears as the sender of the error notification.
- e. Set **Error Email Template** to the template used for the error notification.

### Step 3: Set the Sitemap File Limits

1. Expand  the **Sitemap File Limits** section. Then, do the following:
  - a. In the **Maximum No of URLs per File** field, enter the maximum number of URLs that can be included in the sitemap. By default, the limit is 50,000.
  - b. In the **Maximum File Size** field, enter the largest size in bytes that is allocated for the sitemap. The default size is 10,485,760 bytes.



Sitemap File Limits


Maximum No of URLs Per File  ☒ Use system value

Maximum File Size  ☒ Use system value

File size in bytes.

*Sitemap File Limits*

### Step 4: Set the Search Engine Submission Settings

1. Expand  the **Search Engine Submission Settings** section.
2. If using a robots.txt file to provide instructions to search engines that crawl your site, set **Enable Submission to Robots.txt** to “Yes.”



Search Engine Submission Settings

Enable Submission to Robots.txt  ☒ Use system value

*Search Engine Submission Settings*

3. When complete, tap **Save Config.**

## Search Engine Robots

The Magento configuration includes settings to generate and manage instructions for web crawlers and bots that index your site. The instructions are saved in a file called “robots.txt” that resides in the root of your Magento installation. The instructions are directives that are recognized and followed by most search engines.

By default, the robots.txt file that is generated by Magento contains instructions for web crawler to avoid indexing certain parts of the site that contain files that are used internally by the system. You can use the default settings, or define your own custom instructions for all, or for specific search engines. There are many articles online that explore the subject in detail.

### Example: Custom Instructions

#### Allows Full Access

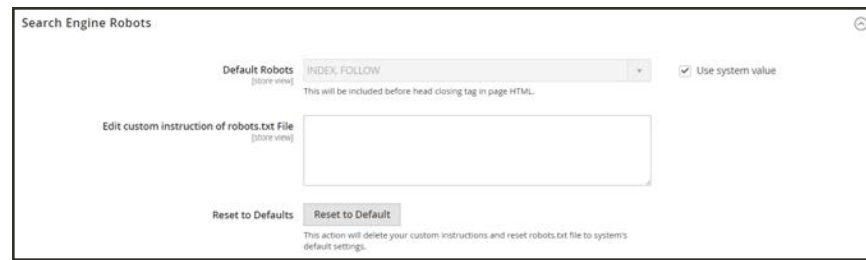
```
User-agent:*  
Disallow:
```

#### Disallows Access to All Folders

```
User-agent:*  
Disallow: /
```


#### Default Instructions

```
Disallow: /lib/  
Disallow: /*.php$  
Disallow: /pkginfo/  
Disallow: /report/  
Disallow: /var/  
Disallow: /catalog/  
Disallow: /customer/  
Disallow: /sendfriend/  
Disallow: /review/  
Disallow: /*SID=
```



### *Search Engine Robots*

#### To configure robots.txt:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Design**.
3. Expand  the **Search Engine Robots** section. Then, do the following:
  - a. Set **Default Robots** to one of the following:
 

INDEX, FOLLOW	Instructs web crawlers to index the site and to check back later for changes.
NOINDEX, FOLLOW	Instructs web crawlers to avoid indexing the site, but to check back later or changes.
INDEX, NOFOLLOW	Instructs web crawlers to index the site once, but to not check back later for changes.
NOINDEX, NOFOLLOW	Instructs web crawlers to avoid indexing the site, and to not check back later for changes.
  - b. If needed, enter custom instructions into the **Edit Custom instruction of robots.txt file** box: For example, while a site is in development, you might want to disallow access to all folders.
  - c. To restore the default instructions, tap **Reset to Default**.
4. When complete, tap **Save Config**.

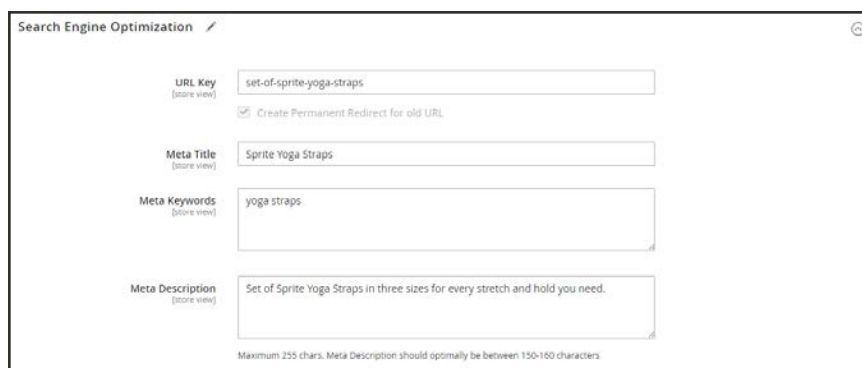
## CHAPTER 38:

# URL Rewrites

The URL Rewrite tool lets you change any URL that is associated with a product, category, or CMS page. When the rewrite goes into effect, any links that point to the previous URL are redirected to the new address.

The terms rewrite and redirect are often used interchangeably, but refer to slightly different processes. A URL rewrite changes the way a URL appears in the browser. A URL redirect, on the other hand, updates the URL that is stored on the server. A URL redirect can be either temporary or permanent. Your store uses URL rewrites and redirects to make it easy for you to change the URL key of a product, category, or page and preserve existing links.

By default, **automatic URL redirects** are enabled for your store. The "Create Permanent Redirect for old URL" checkbox is marked under the URL key field of each product.



Search Engine Optimization

URL Key (store view): set-of-sprite-yoga-straps

☒ Create Permanent Redirect for old URL

Meta Title (store view): Sprite Yoga Straps

Meta Keywords (store view): yoga straps

Meta Description (store view): Set of Sprite Yoga Straps in three sizes for every stretch and hold you need.

Maximum 255 chars. Meta Description should optimally be between 150-160 characters

*Create Permanent Redirect for Old URL*



## Configuring URL Rewrites

URL rewrites make it possible to make existing URLs more “search engine friendly” and also easier for humans to read. Enabling Web Server Apache Rewrites is part of the initial Magento setup. Magento routinely uses URL rewrites to remove the file name “index.php” that normally appears in the URL just after the root folder. When Web Server Rewrites are enabled, the system rewrites each URL to omit “index.php.” The rewrite removes words that convey nothing of value to search engines or customers, and has no impact on performance or site rank.


### URL without Web Server Rewrite

```
http://www.yourdomain.com/magento/index.php/storeview/url-identifier
```

### URL with Web Server Rewrite

```
http://www.yourdomain.com/magento/storeview/url-identifier
```

### To configure URL rewrites:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Web**.
3. Expand  the **Search Engine Optimization** section.



Search Engine Optimization

Use Web Server Rewrites [store view] Yes ☐ Use system value

### *Search Engine Optimization*

4. Set **Use Web Server Rewrites** to your preference.
5. When complete, tap **Save Config**.

## Automatic Product Redirects

Your store can be configured to automatically generate a permanent redirect whenever the URL key of a product or category changes. In the Search Engine Optimization section, the checkbox below the URL key indicates if permanent redirects are enabled. If your store is already configured to automatically redirect catalog URLs, making a redirect is as easy as updating the URL key. The process to create an automatic redirect is the same for both products and categories.

The screenshot shows the 'Search Engine Optimization' configuration panel. The 'URL Key' field contains 'set-of-sprite-yoga-straps'. Below it, the checkbox 'Create Permanent Redirect for old URL' is checked. The 'Meta Title' field contains 'Sprite Yoga Straps', the 'Meta Keywords' field contains 'yoga straps', and the 'Meta Description' field contains 'Set of Sprite Yoga Straps in three sizes for every stretch and hold you need.' A note at the bottom states: 'Maximum 255 chars. Meta Description should optimally be between 150-160 characters.'

*Create Permanent Redirect for Old URL*

### To set up automatic redirects:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, select **Catalog**.
3. Expand the **Search Engine Optimization** section.
4. Set **Create Permanent Redirect for URLs if URL Key Changed** to “Yes.”
5. When complete, tap **Save Config**.

The screenshot shows the 'Search Engine Optimization' configuration panel with the following settings: 'Popular Search Terms' is set to 'Enable'; 'Product URL Suffix' is '.html'; 'Category URL Suffix' is '.html'; 'Use Categories Path for Product URLs' is 'No'; 'Create Permanent Redirect for URLs if URL Key Changed' is 'Yes'; 'Page Title Separator' is '>'; 'Use Canonical Link Meta Tag For Categories' is 'No'; and 'Use Canonical Link Meta Tag For Products' is 'No'. Each setting has a 'Use system value' checkbox which is checked.

*Search Engine Optimization*

### To automatically redirect product URLs:

1. On the Admin sidebar, tap **Products**. Then under **Inventory**, choose **Catalog**.
2. Find the product in the list, and click to open the record.
3. Expand ☑ the **Search Engine Optimization** section. Then in the **URL Key** field, do the following:
  - a. Make sure that the **Create Permanent Redirect for old URL** checkbox is selected. If not, follow the instructions to [enable automatic redirects](#).
  - b. Update the **URL Key** as needed, using all lowercase characters and hyphens instead of spaces.
4. When complete, tap **Save**.
5. When prompted to refresh the cache, follow the links in the message at the top of the workspace. The permanent redirect is now in effect for the product and any associated category URLs.

### To automatically redirect category URLs:

1. On the Admin sidebar, tap **Products**. Then under **Inventory**, choose **Categories**.
2. Find the category in the tree, and click to open the record.
3. Expand ☑ the **Search Engine Optimization** section. Then in the **URL Key** field, do the following:
  - a. Make sure that the **Create Permanent Redirect for old URL** checkbox is selected. If not, follow the instructions to [enable automatic redirects](#).
  - b. Update the **URL Key** as needed, using all lowercase characters and hyphens instead of spaces.
4. When complete, tap **Save**.
5. When prompted to refresh the cache, follow the links in the message at the top of the workspace. The permanent redirect is now in effect for the category and any associated product URLs.

## Creating URL Rewrites

The URL Rewrite tool can be used to create product and category rewrites, and custom rewrites for any page in your store. When the rewrite goes into effect, any existing links that point to the previous URL are seamlessly redirected to the new address.

URL rewrites can be used to add high-value keywords to improve the way the product is indexed by search engines. You can also use rewrites to create additional URLs for a temporary seasonal change, or permanent change. Rewrites can be created for any valid path, including CMS content pages. Internally, the system always references products and categories by their ID. No matter how often the URL changes, the ID remains the same. Here are some ways you can use URL rewrites:

### System URL

`http://www.example.com/catalog/category/id/6`

### Original URL

`http://www.example.com/peripherals/keyboard.html`

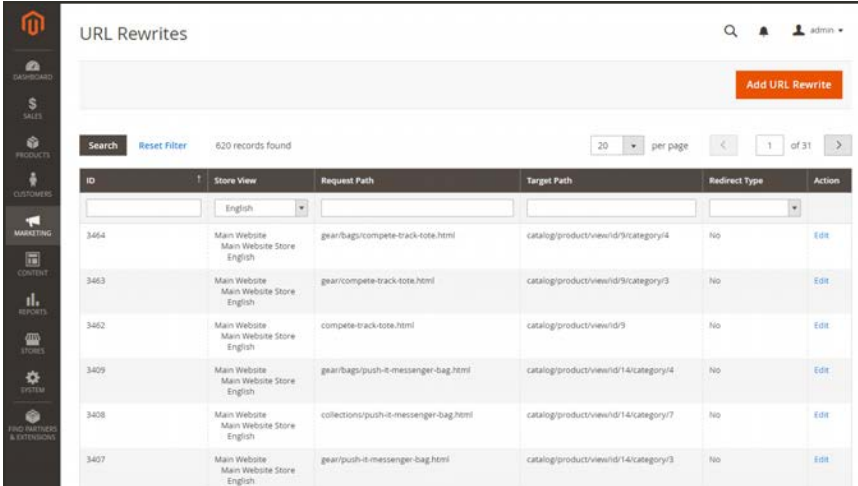
### Redirected Product URL

`http://www.example.com/ergonomic-keyboard.html`

### Additional Category URLs

`http://www.example.com/all-on-sale.html`

`http://www.example.com/save-now/spring-sale`



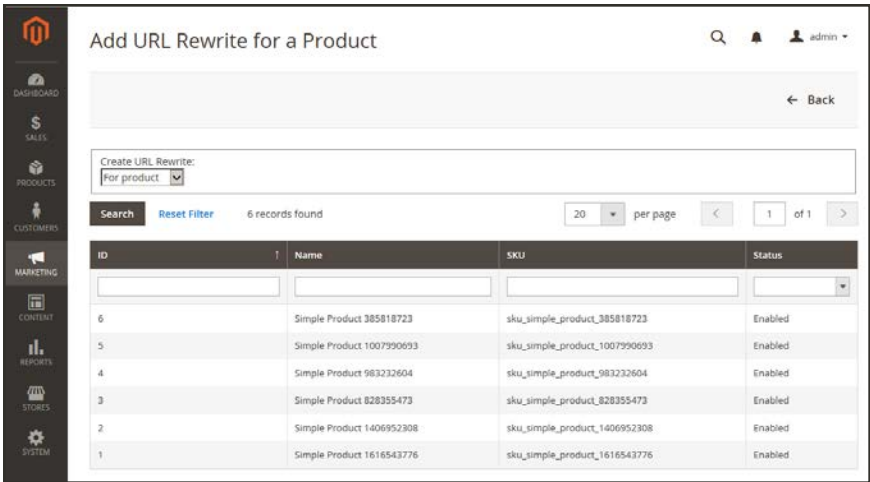
ID	Store View	Request Path	Target Path	Redirect Type	Action
3464	Main Website Main Website Store English	gear/bags/compete-track-tote.html	catalog/product/view/id/9/category/4	No	<a href="#">Edit</a>
3463	Main Website Main Website Store English	gear/compete-track-tote.html	catalog/product/view/id/9/category/3	No	<a href="#">Edit</a>
3462	Main Website Main Website Store English	compete-track-tote.html	catalog/product/view/id/9	No	<a href="#">Edit</a>
3409	Main Website Main Website Store English	gear/bags/push-it-messenger-bag.html	catalog/product/view/id/14/category/4	No	<a href="#">Edit</a>
3408	Main Website Main Website Store English	collections/push-it-messenger-bag.html	catalog/product/view/id/14/category/7	No	<a href="#">Edit</a>
3407	Main Website Main Website Store English	gear/push-it-messenger-bag.html	catalog/product/view/id/14/category/3	No	<a href="#">Edit</a>

URL Rewrites

# Product Rewrites

Before you begin, make sure that you understand exactly what the redirect is to accomplish. Think in terms of "target" and "original request," or "redirect to" and "redirect from." Although people might still navigate to the former page from search engines or outdated links, the redirect causes your store to switch to the new target.

If **automatic redirects** are enabled for your store, there is no need to create a rewrite when a product **URL Key** is changed.



Add URL Rewrite for Product

**Process Overview:**

- Step 1. **Plan the Rewrite**
- Step 2: **Create the Rewrite**
- Step 3. **Test the Result**

## Step 1: Plan the Rewrite

- 1. To avoid mistakes, write down the "redirect to" path and "redirect from" path. The path includes the URL Key and suffix, if applicable.

If you're not sure, open each product page in your store, and copy the path from the address bar of your browser. When creating a product redirect, you can either include or exclude the **category path**. For this example, we create a product redirect without a category path.

### Product with Category Path

Redirect to: gear/bags/impulse-duffle.html

Redirect from: gear/bags/overnight-duffle.html

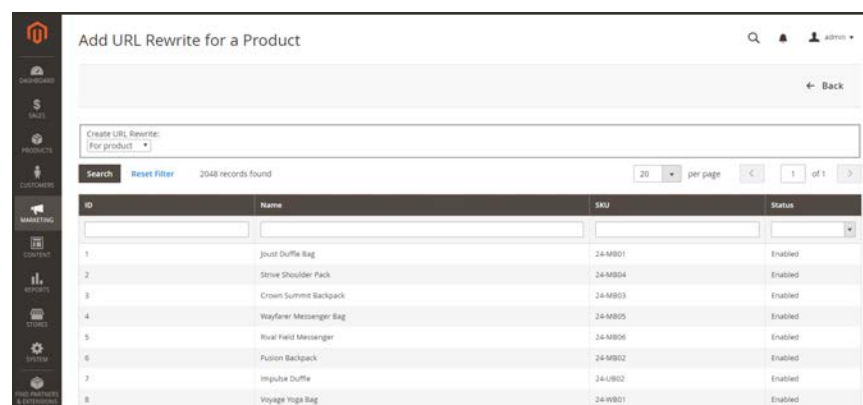
## Product without Category Path

Redirect to: `impulse-duffle.html`

Redirect from: `overnight-duffle.html`

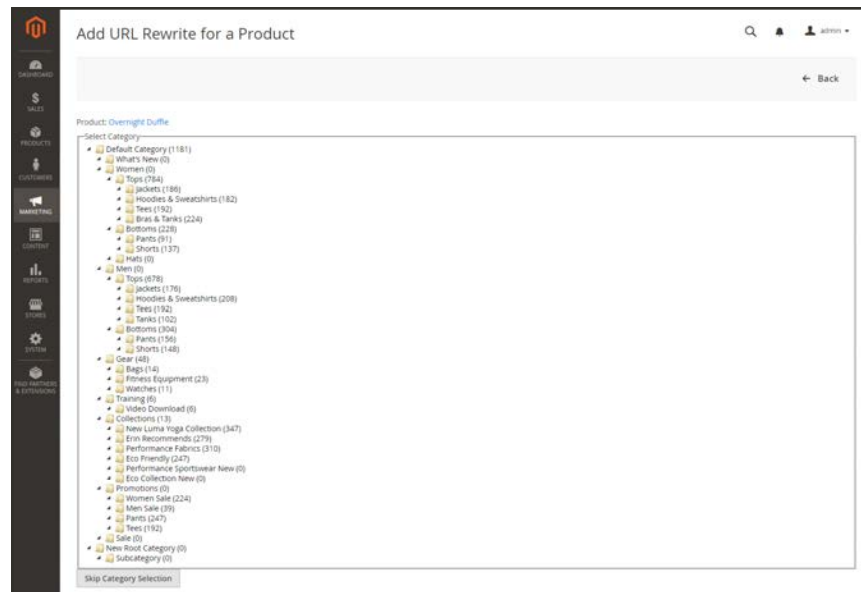
## Step 2: Create the Rewrite

1. On the Admin sidebar, tap **Marketing**. Then under **Search & SEO**, choose **URL Rewrites**.
2. Before you proceed, do the following to verify that the "request path" is available.
  - a. In the search filter at the top of the **Request Path** column, enter the URL key of the page that is to be redirected. Then, tap **Search**.
  - b. If there are multiple redirect records for the page, find the one that matches the applicable store view. Then, open the redirect record in edit mode.
  - c. In the upper-right corner, tap **Delete**. When prompted, tap **OK** to confirm.
3. In the upper-right corner of the URL Rewrites page, tap **Add URL Rewrite**.
4. When you return to the URL Rewrites page, tap **Add URL Rewrite**.
5. Set **Create URL Rewrite** to "For product."
6. In the grid, find the product that is the target—or destination—of the redirect. Then, click the row.



*Add URL Rewrite for a Product*

7. Below the category tree, tap **Skip Category Selection**. For this example, the redirect does not include a category.



### *Skip Category Selection*

The Add URL Rewrite for a Product page displays a link to the target in the upper-left corner, and the Target Path field displays the system version of the path, which cannot be changed. Initially, the Redirect Path field also displays the target path.

- a. If you have multiple store views, set **Store** to the view where the rewrite applies. Otherwise, a rewrite will be created for each view.
- b. In the **Request Path** field, type over the default entry, and enter the URL key and suffix—if applicable—of the original product request. This is the "Redirect from" product that you identified in the planning step.

The Request Path must be unique for the specified store. If there is already a redirect that uses the same Request Path, you will receive an error when you try to save the redirect. The previous redirect must be deleted before you can create a new one.

- c. Set **Redirect Type** to one of the following:
  - Temporary (302)
  - Permanent (301)
- d. For your own reference, enter a brief **Description** of the rewrite.

**Add URL Rewrite for a Product**

Product: [Overnight Duffie](#)

URL Rewrite Information

Store: English

Request Path:

Target Path:

Redirect Type: Permanent (301)

Description:

Back Save

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*URL Rewrite Information*

8. Before saving the redirect, review the following:
  - The link in the upper-left corner displays the name of the target product.
  - The Request Path contains the path for the original "redirect from" product.
9. When complete, tap **Save**.

The new product rewrite now appears at the top of the URL Rewrites grid.

**URL Rewrites**

You deleted the URL rewrite.

Search Reset Filter 2861 records found 20 per page 1 of 144

ID	Store View	Request Path	Target Path	Redirect Type	Action
3666	Main Website Store English	impulse-duffie.html	overnight-duffie.html	Permanent (301)	<a href="#">Edit</a>
3635	Main Website Store German	gear/watches/retro-analog-watch.html	catalog/product/view/id/2047/category/8	No	<a href="#">Edit</a>
3634	Main Website Store German	gear/retro-analog-watch.html	catalog/product/view/id/2047/category/9	No	<a href="#">Edit</a>
3633	Main Website Store German	retro-analog-watch.html	catalog/product/view/id/2047	No	<a href="#">Edit</a>

*URL Rewrite Saved*

### Step 3: Test the Result

1. Go to the home page of your store.
2. Do one of the following:
  - Navigate to the original "redirect from" product request page.
  - In the address bar of the browser, enter the path to the original "redirect from" product immediately after the store URL. Then, press **Enter**.



The new target product appears instead of the original product request.

### Field Descriptions

FIELD	DESCRIPTION						
Create URL Rewrite	<p>Indicates the type of rewrite. The type cannot be changed after the rewrite is created. Options:</p> <p>Custom</p> <p>For category</p> <p>For product</p> <p>For CMS page</p>						
Request Path	<p>The product that is to be redirected. Depending on your configuration, the Request Path might include the .html or .htm suffix, and category.</p> <p>The Request Path must be unique, and cannot be in use by another redirect. If you receive an error that the Request Path already exists, delete the existing redirect, and try again.</p>						
Target Path	The internal path that is used by the system to point to the destination of the redirect. The target path is grayed out and cannot be edited.						
Redirect	<p>Determines the type of redirect. Options :</p> <table> <tr> <td>No</td><td> <p>No redirect is specified.</p> <p>Many operations create redirect requests of this type. For example, every time you add products to a category, a redirect of the "No" type is created each store view.</p> </td></tr> <tr> <td>Temporary (302)</td><td> <p>Indicates to search engines that the rewrite is for a limited time. Search engines generally do not retain page rank information for temporary rewrites.</p> </td></tr> <tr> <td>Permanent (301)</td><td> <p>Indicates to search engines that the rewrite is permanent. Search engines generally retain page rank information for permanent rewrites.</p> </td></tr> </table>	No	<p>No redirect is specified.</p> <p>Many operations create redirect requests of this type. For example, every time you add products to a category, a redirect of the "No" type is created each store view.</p>	Temporary (302)	<p>Indicates to search engines that the rewrite is for a limited time. Search engines generally do not retain page rank information for temporary rewrites.</p>	Permanent (301)	<p>Indicates to search engines that the rewrite is permanent. Search engines generally retain page rank information for permanent rewrites.</p>
No	<p>No redirect is specified.</p> <p>Many operations create redirect requests of this type. For example, every time you add products to a category, a redirect of the "No" type is created each store view.</p>						
Temporary (302)	<p>Indicates to search engines that the rewrite is for a limited time. Search engines generally do not retain page rank information for temporary rewrites.</p>						
Permanent (301)	<p>Indicates to search engines that the rewrite is permanent. Search engines generally retain page rank information for permanent rewrites.</p>						
Description	Describes the purpose of the rewrite for internal reference.						

## Category Rewrites

If a category is removed from your catalog, you can use a category rewrite to redirect links to the URL of another category in your store. Think in terms of "target" and "original request," or "redirect to" and "redirect from." Although people might still navigate to the former page from search engines or outdated links, the redirect causes your store to switch to the new target.

If **automatic redirects** are enabled for your store, there is no need to create a rewrite when a category **URL Key** is changed.

*URL Rewrite for Category*

### Process Overview:

- Step 1: **Plan the Rewrite**
- Step 2: **Create the Rewrite**
- Step 3: **Test the Result**

### Step 1: Plan the Rewrite

1. To avoid mistakes, write down the "redirect to" path and "redirect from" path. The paths should include the URL Key and suffix, if applicable.

If you're not sure, open each category page in your store, and copy the path from the address bar of your browser.

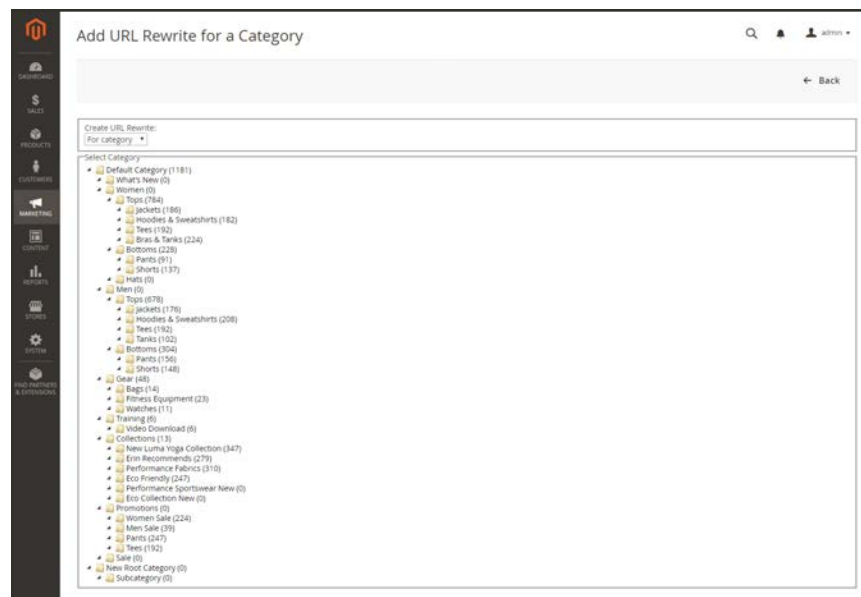
#### Category Path

Redirect to: gear/backpacks-and-bags.html

Redirect from: gear/bags.html

## Step 2: Create the Rewrite

1. On the Admin sidebar, tap **Marketing**. Then under **SEO & Search**, choose **URL Rewrites**.
2. Before you proceed, do the following to verify that the "request path" is available,
  - a. In the search filter at the top of the **Request Path** column, enter the URL key of the category that is to be redirected. Then, tap **Search**.
  - b. If there are multiple redirect records for the page, find the one that matches the applicable store view. Then, open the redirect record in edit mode.
  - c. In the upper-right corner, tap **Delete**. When prompted, tap **OK** to confirm.
3. When you return to the URL Rewrites page, tap **Add URL Rewrite**.
4. Set **Create URL Rewrite** to "For category." Then in the category tree, choose the target category that is the destination of the redirect.



*Category Tree*

5. In the URL Rewrite section, do the following:
  - a. If you have multiple stores, select the **Store** where the rewrite applies.
  - b. In the **Request Path** field, enter the URL key of the category that the customer requests. This is the "redirect from" category.

The Request Path must be unique for the specified store. If there is already a redirect that uses the same Request Path, you will receive an error when you try to save the redirect. The previous redirect must be deleted before you can create a new one.

- c. Set **Redirect** to one of the following:
  - Temporary (302)
  - Permanent (301)
- d. For your reference, enter a brief description of the rewrite.

Category Rewrite Information

- 6. Before saving the redirect, review the following:
  - The link in the upper-left corner displays the name of the target category.
  - The Request Path contains the path for the original "redirect from" category.
- 7. When complete, tap **Save** button.

The new category rewrite appears at the top of the URL Rewrites grid.

New Category Rewrite

### Step 3: Test the Result

1. Go to the home page of your store.
2. Do one of the following:
  - Navigate to the original "redirect from" category.
  - In the address bar of the browser, enter the path to the original "redirect from" category immediately after the store URL. Then, press **Enter**.

The new target category appears instead of the original category request.

### Field Descriptions

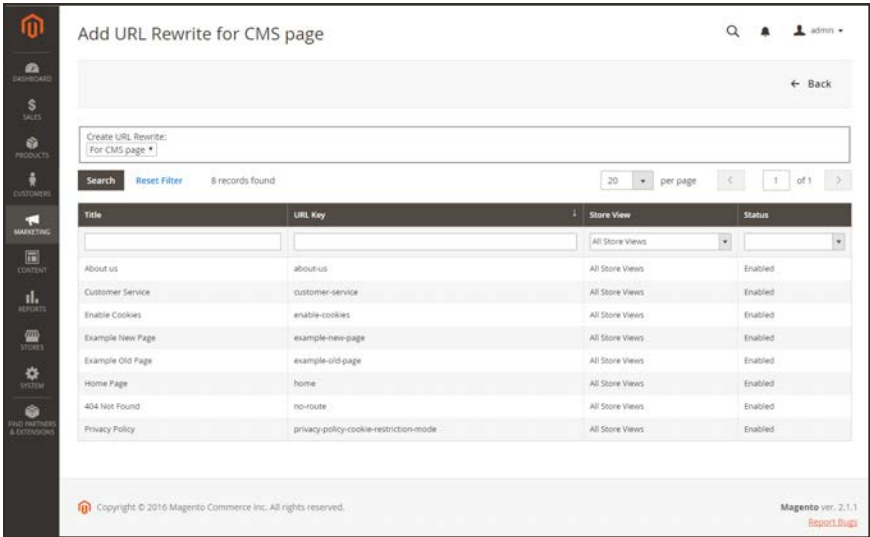
FIELD	DESCRIPTION		
Create URL Rewrite	<p>Indicates the type of rewrite. The type cannot be changed after the rewrite is created. Options:</p> <p>Custom</p> <p>For category</p> <p>For product</p> <p>For CMS page</p>		
Request Path	<p>The category that is to be redirected. Depending on your configuration, the Request Path might include the .html or .htm suffix, and parent category.</p> <p>The Request Path must be unique, and cannot be in use by another redirect. If you receive an error that the Request Path already exists, delete the existing redirect, and try again.</p>		
Target Path	<p>The internal path that is used by the system to point to the destination of the redirect. The target path is grayed out and cannot be edited.</p>		
Redirect	<p>Determines the type of redirect. Options :</p> <table> <tr> <td>No</td><td> <p>No redirect is specified.</p> <p>Many operations create redirect requests of this type. For example, every time you add products to a category, a redirect of the "No" type is created each store view.</p> </td></tr> </table>	No	<p>No redirect is specified.</p> <p>Many operations create redirect requests of this type. For example, every time you add products to a category, a redirect of the "No" type is created each store view.</p>
No	<p>No redirect is specified.</p> <p>Many operations create redirect requests of this type. For example, every time you add products to a category, a redirect of the "No" type is created each store view.</p>		

**Field Descriptions (cont.)**

FIELD	DESCRIPTION
Temporary (302)	Indicates to search engines that the rewrite is for a limited time. Search engines generally do not retain page rank information for temporary rewrites.
Permanent (301)	Indicates to search engines that the rewrite is permanent. Search engines generally retain page rank information for permanent rewrites.
Description	Describes the purpose of the rewrite for internal reference.

# CMS Page Rewrites

Before you begin, make sure that you understand exactly what the redirect is to accomplish. Think in terms of "target" and "source," or "redirect to" and "redirect from." Although people might still navigate to the former page from search engines or outdated links, the redirect causes your store to switch to the new target.



Add URL Rewrite

## Process Overview:

- Step 1: Plan the Rewrite
- Step 2: Create the Rewrite
- Step 3: Test the Result

## Step 1: Plan the Rewrite

1. To avoid mistakes, write down the URL key of the "redirect to" page and "redirect from" page.

If you're not sure, open each page in your store, and copy the path from the address bar of your browser.

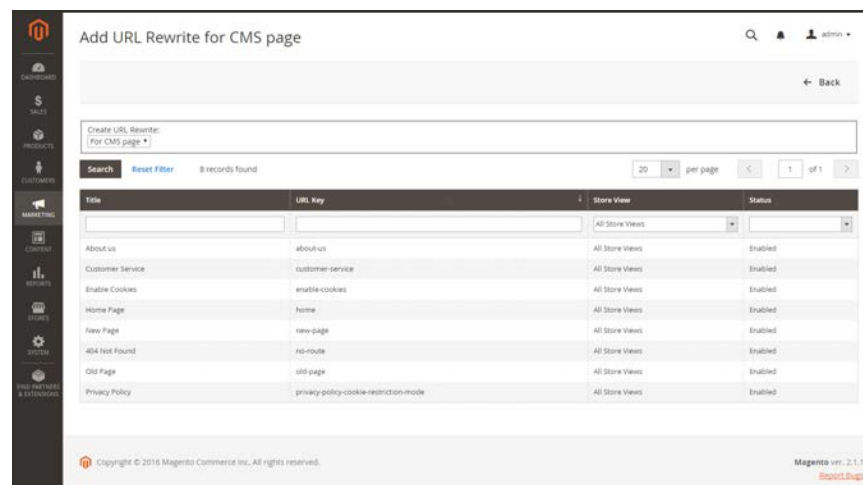
## CMS Page Path

Redirect to: new-page

Redirect from: old-page

## Step 2: Create the Rewrite

1. On the Admin sidebar, tap **Marketing**. Then under **SEO & Search**, choose **URL Rewrites**.
2. Before you proceed, do the following to verify that the "request path" is available.
  - a. In the search filter at the top of the **Request Path** column, enter the URL key of the page that is to be redirected. Then, tap **Search**.
  - b. If there are multiple redirect records for the page, find the one that matches the applicable store view. Then, open the redirect record in edit mode.
  - c. In the upper-right corner, tap **Delete**. When prompted, tap **OK** to confirm.
3. When you return to the URL Rewrites page, tap **Add URL Rewrite**.
4. Set **Create URL Rewrite** to "for CMS page."
5. Find your new target page in the grid, and open in edit mode.



*Custom URL Rewrite*

6. Under URL Rewrite Information, do the following:
  - a. If you have multiple store views, select the **Store** where the rewrite applies.
  - b. In the **Request Path** field, enter the URL key of the original page that the customer requests. This is the "redirect from" page.

The Request Path must be unique for the specified store. If there is already a redirect that uses the same Request Path, you will receive an error when you try to save the redirect. The previous redirect must be deleted before you can create a new one.

- c. Set **Redirect to** to one of the following:



- Temporary (302)
  - Permanent (301)
- d. For your reference, enter a brief description of the rewrite.

The screenshot shows the 'Add URL Rewrite for CMS page' interface. At the top, there's a search bar and user profile. Below, a breadcrumb trail shows 'CMS page: Example New Page'. The 'URL Rewrite Information' section contains the following fields:

- Store:** A dropdown menu set to 'English'.
- Request Path:** A text input field containing 'example-old-page'.
- Target Path:** A text input field containing 'cms/page/view/page\_id/10'.
- Redirect Type:** A dropdown menu set to 'No'.
- Description:** A text area containing 'Redirect to new page from old page'.

Buttons for 'Back' and 'Save' are located at the top right. The footer shows 'Copyright © 2016 Magento Commerce Inc. All rights reserved.' and 'Magento ver. 2.1.1'.

Custom URL Rewrite

7. Before saving the redirect, review the following:
- The link in the upper-left corner displays the name of the target page.
  - The Request Path contains the path for the original "redirect from" page.
8. When complete, tap **Save**.
- The new rewrite appears in the grid at the top of the list.

The screenshot shows the 'URL Rewrites' management page. A yellow message bar at the top states 'The URL Rewrite has been saved.' Below this, a table displays the list of URL rewrites. The table has the following columns: ID, Store View, Request Path, Target Path, Redirect Type, and Action.

ID	Store View	Request Path	Target Path	Redirect Type	Action
4179	Main Website Main Website Store English	old-page	new-page	Permanent (301)	Edit
4178	Main Website Main Website Store Spanish	new-page	cms/page/view/page_id/10	No	Edit
4177	Main Website Main Website Store German	new-page	cms/page/view/page_id/10	No	Edit
4176	Main Website Main Website Store French	new-page	cms/page/view/page_id/10	No	Edit

Saved URL Rewrite

### Step 3: Test the Result

1. Go to the home page of your store.
2. Do one of the following:
  - Navigate to the original "redirect from" page.
  - In the address bar of the browser, enter the name of the original "redirect from" page immediately after the store URL. Then, press **Enter**.

The new target page appears instead of the original page request.

### Field Descriptions

FIELD	DESCRIPTION
Create URL Rewrite	Indicates the type of rewrite. The type cannot be changed after the rewrite is created. Options: Custom For category For product For CMS page
Request Path	The CMS page that is to be redirected. The Request Path must be unique, and cannot be in use by another redirect. If you receive an error message that the Request Path already exists, delete the existing redirect, and try again.
Target Path	The internal path that is used by the system to point to the destination. The target path is grayed out and cannot be edited.
Redirect	Determines the type of redirect. Options :  No                      No redirect is specified.  Temporary (302)                      Indicates to search engines that the rewrite is for a limited time. Search engines generally do not retain page rank information for temporary rewrites.  Permanent (301)                      Indicates to search engines that the rewrite is permanent. Search engines generally retain page rank information for permanent rewrites.
Description	Describes the purpose of the rewrite for internal reference.

## Custom Rewrites

A custom rewrite can be used to manage miscellaneous redirects, such as redirecting a page from your store to an external website. For example, you might have two Magento websites, each with their own domain. You can use a custom redirect to reroute requests for a product, category, or page to the other website. Unlike other redirect types, the target of a custom redirect is not chosen from a list of existing pages in your store.

Before you begin, make sure that you understand exactly what the redirect is to accomplish. Think in terms of "target" and "original request," or "redirect to" and "redirect from." Although people might still navigate to the former page from search engines or outdated links, the redirect causes your store to switch to the new target.

*Add URL Rewrite*

### Process Overview:

Step 1: **Plan the Rewrite**

Step 2: **Create the Rewrite**

Step 3: **Test the Result**

### Step 1: Plan the Rewrite

1. To avoid mistakes, write down the URL of the "redirect to" page, and the URL key of the "redirect from" page.

If you're not sure, open each page, and copy the URL from the address bar of your browser.

#### Custom Path

Redirect to: `http://www.different-website.com/page.html`

Redirect from: `cms-page`

```
category.html
category/subcategory.html
product.html
category/product.html
```

## Step 2: Create the Rewrite

1. On the Admin sidebar, tap **Marketing**. Then under **SEO & Search**, choose **URL Rewrites**.
2. Before you proceed, do the following to verify that the "request path" is available:
  - a. In the search filter at the top of the **Request Path** column, enter the URL key of the page that is to be redirected. Then, tap **Search**.
  - b. If there are multiple redirect records for the page, find the one that matches the applicable store view. Then, open the redirect record in edit mode.
  - c. In the upper-right corner, tap **Delete**. When prompted, tap **OK** to confirm.
3. When you return to the URL Rewrites page, tap **Add URL Rewrite**.
4. Set **Create URL Rewrite** to "Custom."
5. Under URL Rewrite Information, do the following:
  - a. If you have multiple store views, select the **Store** where the rewrite applies.
  - b. In the **Request Path** field, enter the URL key and path—if applicable—of the product, category, or CMS page that is to be redirected.
 

The Request Path must be unique for the specified store. If there is already a redirect that uses the same Request Path, you will receive an error when you try to save the redirect. The previous redirect must be deleted before you can create a new one.
  - c. In the **Target Path** field, enter the URL of the destination. If the target is located on another website, enter the fully qualified URL.
  - d. Set **Redirect to** to one of the following:
    - Temporary (302)
    - Permanent (301)
  - e. For your reference, enter a brief description of the rewrite.

The screenshot shows the 'Add New URL Rewrite' form in the Magento admin interface. The form is titled 'Add New URL Rewrite' and has a 'Back' button and a 'Save' button at the top right. Below the title, there is a 'Create URL Rewrite:' dropdown menu set to 'Custom'. The 'URL Rewrite Information' section contains the following fields: 'Store' (English), 'Request Path' (old-page), 'Target Path' (http://www.different-website.com/page.html), 'Redirect Type' (Temporary (302)), and 'Description' (Temporary redirect from old-page from this store to a page on a different website). The footer of the form shows 'Copyright © 2016 Magento Commerce Inc. All rights reserved.' and 'Magento ver. 2.1.1'.

Custom URL Rewrite

- 6. Before saving the redirect, review the following:
  - The Request Path contains the URL key or path of the original "redirect from" page.
  - The Target Path contains the URL of the "redirect to" page.
- 7. When complete, tap **Save**.

The new rewrite appears in the grid at the top of the list.

The screenshot shows the 'URL Rewrites' grid in the Magento admin interface. A yellow banner at the top indicates 'The URL Rewrite has been saved.' The grid has a search bar and a 'Reset Filter' button. Below the search bar, it says '2882 records found'. The grid has columns for ID, Store View, Request Path, Target Path, Redirect Type, and Action. The first four rows of the grid are as follows:

ID	Store View	Request Path	Target Path	Redirect Type	Action
4179	Main Website Main Website Store English	old-page	new-page	Permanent (301)	<a href="#">Edit</a>
4178	Main Website Main Website Store Spanish	new-page	cms/page/new/page_id/10	No	<a href="#">Edit</a>
4177	Main Website Main Website Store German	new-page	cms/page/new/page_id/10	No	<a href="#">Edit</a>
4176	Main Website Main Website Store French	new-page	cms/page/new/page_id/10	No	<a href="#">Edit</a>

Saved URL Rewrite

Step 3: Test the Result

- 1. Go to the home page of your store.
- 2. Do one of the following:

- Navigate to the original "redirect from" page.
- In the address bar of the browser, enter the name of the original "redirect from" page immediately after the store URL. Then, press **Enter**.

The new target page appears instead of the original page request.

### Field Descriptions

FIELD	DESCRIPTION						
Create URL Rewrite	<p>Indicates the type of rewrite. The type cannot be changed after the rewrite is created. Options:</p> <p>Custom</p> <p>For category</p> <p>For product</p> <p>For CMS page</p>						
Request Path	<p>The path to the product, category, or CMS page that is to be redirected. Depending on your configuration, the Request Path might include the .html or .htm suffix.</p> <p>The Request Path must be unique, and cannot be in use by another redirect. If you receive an error that the Request Path already exists, delete the existing redirect, and try again.</p>						
Target Path	The path or URL that is the destination of the redirect.						
Redirect	<p>Determines the type of redirect. Options :</p> <table> <tr> <td>No</td><td> <p>No redirect is specified.</p> <p>Many operations create redirect requests of this type. For example, every time you add products to a category, a redirect of the "No" type is created each store view.</p> </td></tr> <tr> <td>Temporary (302)</td><td> <p>Indicates to search engines that the rewrite is for a limited time. Search engines generally do not retain page rank information for temporary rewrites.</p> </td></tr> <tr> <td>Permanent (301)</td><td> <p>Indicates to search engines that the rewrite is permanent. Search engines generally retain page rank information for permanent rewrites.</p> </td></tr> </table>	No	<p>No redirect is specified.</p> <p>Many operations create redirect requests of this type. For example, every time you add products to a category, a redirect of the "No" type is created each store view.</p>	Temporary (302)	<p>Indicates to search engines that the rewrite is for a limited time. Search engines generally do not retain page rank information for temporary rewrites.</p>	Permanent (301)	<p>Indicates to search engines that the rewrite is permanent. Search engines generally retain page rank information for permanent rewrites.</p>
No	<p>No redirect is specified.</p> <p>Many operations create redirect requests of this type. For example, every time you add products to a category, a redirect of the "No" type is created each store view.</p>						
Temporary (302)	<p>Indicates to search engines that the rewrite is for a limited time. Search engines generally do not retain page rank information for temporary rewrites.</p>						
Permanent (301)	<p>Indicates to search engines that the rewrite is permanent. Search engines generally retain page rank information for permanent rewrites.</p>						
Description	Describes the purpose of the rewrite for internal reference.						





## CHAPTER 39:

# Google Tools

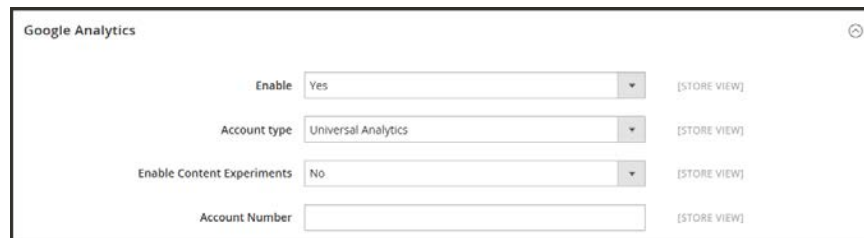
Your store configuration is integrated with the following Google tools to help optimize your content, analyze your traffic, and connect your catalog to shopping aggregators and marketplaces.

- [Google Analytics](#)
- [Google Tag Manager](#)
- [Google Adwords](#)



## Google Analytics

Google Analytics gives you the ability to define additional custom dimensions and metrics for tracking, with support for offline and mobile app interactions, and access to ongoing updates.

A screenshot of the Google Analytics configuration interface. It features a title bar "Google Analytics" with a refresh icon. Below are four rows of settings: "Enable" with a dropdown set to "Yes", "Account type" with a dropdown set to "Universal Analytics", "Enable Content Experiments" with a dropdown set to "No", and "Account Number" with an empty text field. Each row has a "[STORE VIEW]" link to its right.

*Google Analytics*

### Process Overview:

Step 1: [Sign Up for Google Analytics](#)

Step 2: [Complete the Magento Configuration](#)

### Step 1: Sign Up for Google Analytics

Visit the Google website, and sign up for a [Google Analytics](#) account.

### Step 2: Complete the Magento Configuration

1. Return to your store, and log in to the Admin. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Google API**.
3. Expand ☑ the **Google Analytics** section. Then, do the following:
  - a. Set **Enable** to “Yes.”
  - b. Set **Account Type** to “Universal Analytics”.

[Universal Analytics](#) introduced a new way to collect and organize data, and is now the standard for all Google Analytics accounts.
  - c. Enter your Google Analytics **Account Number**.
  - d. If you want to conduct A/B testing and other performance tests on your content, set **Content Experiments** to “Yes.”
4. When complete, tap **Save Config**.

## Google Tag Manager

Google Tag Manager helps you manage the many tags, or snippets of code, that are related to your marketing campaign events. Google Tag Manager gives you the ability to add tracking tags to your site to measure the audience, or to personalize, retarget, or conduct search engine marketing initiatives. The tags “listen” for events, and push the needed data to Google Analytics.

Magento uses a data layer to define the data that is sent to Google Analytics and Google Tag Manager. A data layer is an object that contains all of the information that you want to pass to Google Tag Manager.

Google Tag Manager directly transfers data and events to Google Analytics, Enhanced Ecommerce and other third-party analytics solutions, to produce a clear picture of how well your site, products, and promotions are performing.

To configure Google Tag Manager, you must have a valid account for each of the following:

- [Google Analytics](#)
- [Google Tag Manager](#)

The following instructions walk you through the process of setting up a Google Tag Manager account, and configuring your Magento store.

### Process Overview:

Step 1: [Configure Your Google Analytics Account](#)

Step 2: [Configure Your Google Tag Manager Account](#)

Step 3: [Configure Your Store](#)

### Step 1: Configure Your Google Analytics Account

1. Sign in to your Google Analytics account.
2. To enable **Internal Site Search Tracking**, do the following:
  - a. Navigate to **Select View > View Settings**.
  - b. Turn **Site Search Tracking** On.
  - c. Set **Query** parameter to “q”.
  - d. When complete, **Save** the settings.
3. To enable display features, do the following:
  - a. Choose **Property Settings**.
  - b. Under Advertising Features, set **Enable Demographics and Interest Reports** to “On”.
  - c. **Save** the settings.
4. To enable Ecommerce Tracking, do the following:

- a. Navigate to **Select View > Ecommerce Settings**.
  - b. Set **Enable Ecommerce** to “On”.
  - c. Set **Enable Enhanced Ecommerce Reporting** to “On”.
  - d. **Save** the settings.
5. Reload the page to verify that all the settings remain “On.”

If not all settings are “On,” repeat the previous steps, save, and reload the page. Repeat this process until all settings are set to “On”.

## Step 2: Configure Your Google Tag Manager Account

The following instructions show how to configure a new container with the basic settings. A sample **Composer** configuration (.json) file is used to simplify the process.

1. Right-click this link: [GMT M2 Config json.txt](#). Choose **Save link as** to download the sample text file. Then, do the following:
  - a. Open the file in an editor, and save as GMT M2 Config.json.
  - b. Zip the file to produce an archive called GMT M2 Config.zip.

The zipped file will be imported directly into Google Tag Manager, and does not need to be copied to your server.
2. Create a new container. For this example, we recommend that you create a new container, rather than modify an existing container.
3. Navigate to **Admin > Container > Import Container**. Then, verify the following settings:
  - The **Overwrite** option should be selected for the new container.
  - The **Merge** option should be selected if you are using an existing container.
4. To edit the **Google Analytics ID** that is referenced in variables, do the following:
  - a. Navigate to **Variables > User-Defined Variables**.
  - b. Choose **Google Analytics**. Then, update the placeholder (UA-xxxxxx-x) with your own **GA ID**.
5. Follow Google’s instructions to add tags, triggers, and variables to the new container.
 

If you have settings in another container that you want to use, they can be moved to the new container.
6. Follow Google’s instructions to publish the new container.

### Step 3: Configure Your Store

1. Log in to the Admin of your Magento store.
2. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
3. In the panel on the left under **Sales**, choose **Google API**.
4. Expand ☑ the **Google Analytics** section, and do the following:

#### *Google API - Google Tag Manager*

- a. Set **Enable** to “Yes.”
  - b. Set **Account type** to “Google Tag Manager.”
  - c. In the **Container ID** field, enter your GTM ID. (GTM-xxxxxx)
  - d. If you are also using Google Analytics to content experiments, set **Enable Content Experiments** to “Yes.”
  - e. Leave the remaining fields as they are.
5. When complete, tap **Save Config**.
  6. Test your Google Tag Manager settings to verify that everything works correctly.

## Creating a Tag to Track Conversions

If you have a Google AdWords account, you can create a tag that tracks conversions. The following example shows how to use both Google Tag Manager and Google Analytics to create a tag that fires on your store's conversion "Success" page.

### Process Overview:

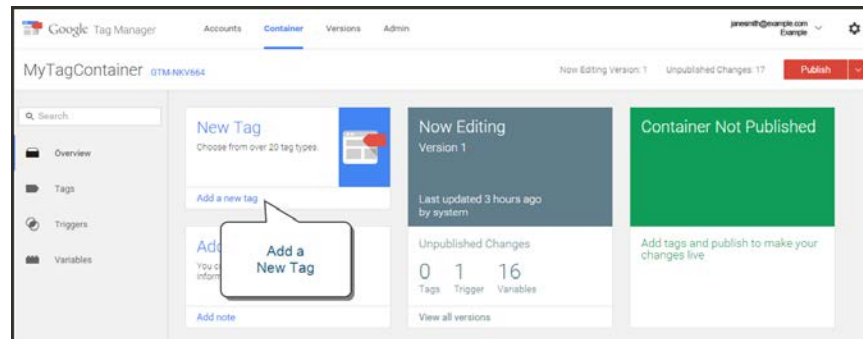
Step 1: [Create a Tag](#)

Step 2: [Create a Rule](#)

Step 3: [Preview and Publish](#)

### Step 1: Create a Tag

1. Log in to your [Google Tag Manager](#) account. Then, click the link for the container that you created for your store.
2. In the **New Tag** box, tap [Add a new tag](#).

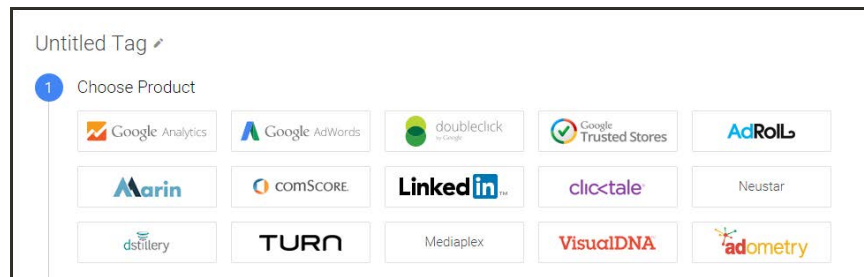


*Google Tag Manager*

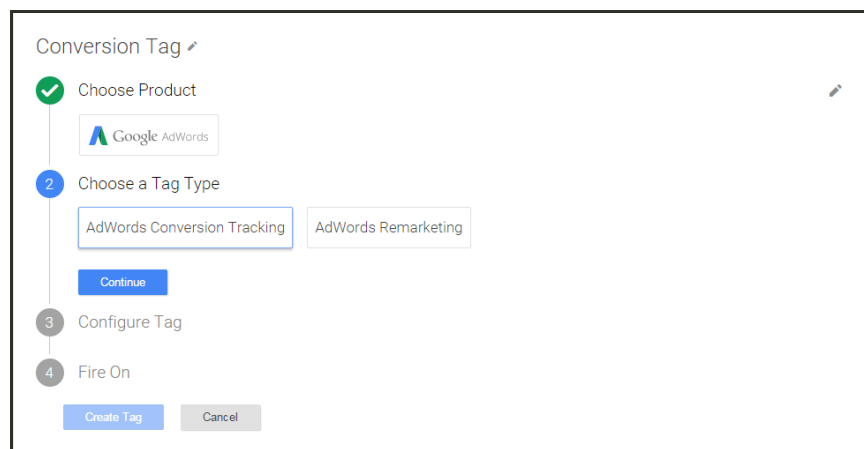
3. You will need the following information from your AdWords account:
  - Conversion ID
  - Conversion Label

If you need help, visit Google's [support site](#).

4. From the Google Tag Manager dashboard, tap [Google AdWords](#). Then, do the following:
  - a. Tap the title placeholder, and enter a name for the new tag.
  - b. Under **Choose Product**, select **Google Adwords**.

*Choose Product*

- c. Under **Choose a Tag Type**, select **AdWords Conversion Tracking**. Then, tap **Continue**.



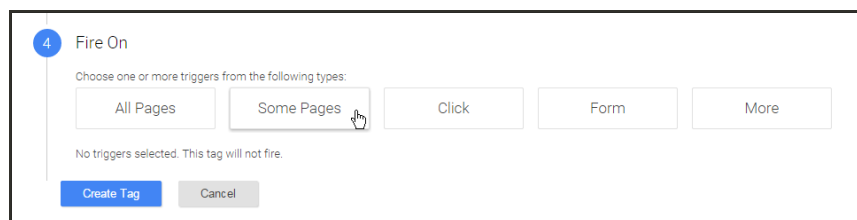
5. Enter the **Conversion ID** and **Conversion Label** from your AdWords account. Then, tap **Continue**.

*Configure Tag*

## Step 2: Create a Rule

Continuing from the Google Tag Manager dashboard, the next step is to create a rule that fires the tag on the conversion page.

1. Under **Fire On**, tap **Some Pages**.



2. In the Choose Pages section, complete the following settings:

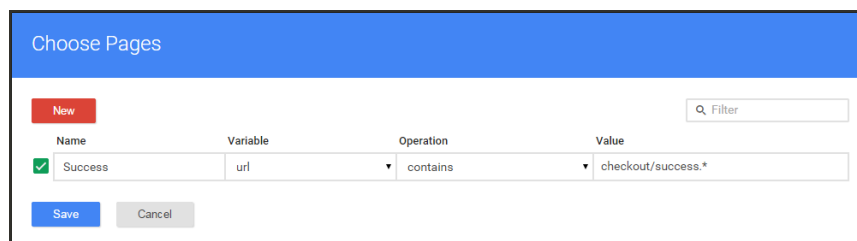
Name: Enter a name for the page description.

Variable: url

Operation: matches RegEx

To learn more, see: [What is “matches regex” for?](#) in Tag Manager Help

Value: checkout/success.\*



Name	Variable	Operation	Value
<input checked="" type="checkbox"/> Success	url	contains	checkout/success.*

*Conversion Page Location*

3. Mark the green checkbox, and tap **Save**. The trigger that you set up appears as a blue button in the Fire On section.
4. When complete, tap **Save Tag**.

Conversion Tag

✓ Choose Product

Google AdWords

✓ Choose a Tag Type

AdWords Conversion Tracking

✓ Configure Tag

Tag Type: AdWords Conversion Tracking

Conversion ID: 1234567890

Conversion Label: 1234567890

4 Fire On

Choose one or more triggers from the following types:

All Pages Some Pages Click Form More

This trigger will fire your tag: [Create](#)

Success

Trigger

Save Tag Cancel Copy Delete

### Step 3: Preview and Publish

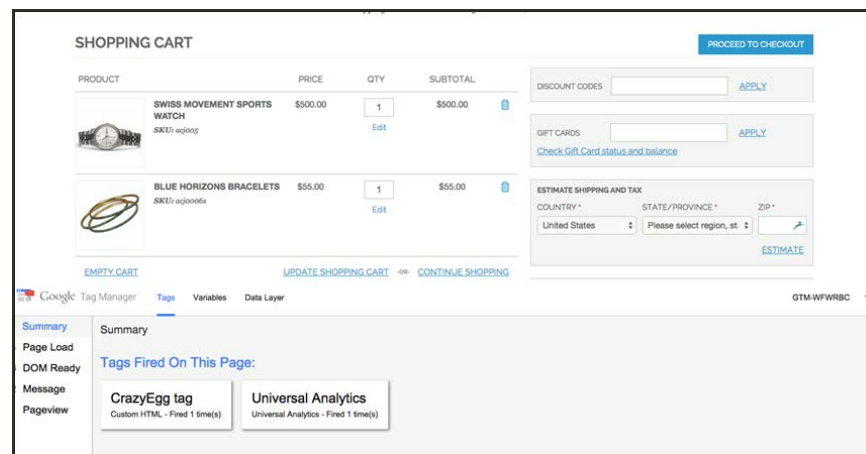
The next step in the process is to preview the tag. Each time the tag is previewed, a snapshot of the version is saved. When you are satisfied with the results, go to the version that you want to use, and tap **Publish**.



## Enhanced Ecommerce

Enhanced Ecommerce is a plugin for Google Universal Analytics that gives you insight into the shopping and purchasing behavior of your customers. You can use Enhanced Ecommerce to produce reports about key customer activities, such as when customers add items to the cart, begin the checkout process, or complete a purchase. You can also identify and analyze patterns of shoppers who abandon their carts without making a purchase.

The following instructions show how to configure Google Tag Manager with Universal Analytics to produce Enhanced Ecommerce data and reports.



*Tags Fired in Shopping Cart Shown in Debug Mode*

### Step 1: Sign Up for Google Accounts

1. Sign up for a **Google Tag Manager** account, and complete the Magento configuration.
2. Sign up for a new **Google Universal Analytics** account.

### Step 2: Configure Enhanced Ecommerce

1. Sign in to your Google Universal Analytics account.
2. Create a new property for Enhanced Ecommerce analytics with the following settings:

## Enhanced Ecommerce Property

SETTING	VALUE
<b>ENABLE ECOMMERCE SETTINGS</b>	
Status	ON
Related Products	ON
<b>ENHANCED ECOMMERCE SETTINGS</b>	
Enable Enhanced Ecommerce Reporting	ON
Checkout Labeling	(not required)

3. When complete, tap **Submit**.

**Ecommerce set-up**

✓ **Enable Ecommerce** Edit  
 Status: ON  
 Related Products: ON

2 **Enhanced Ecommerce Settings**

**Enable Enhanced Ecommerce Reporting**

ON

**Checkout Labeling** OPTIONAL  
 Create labels for the checkout-funnel steps you identified in your ecommerce tracking code. Use easily understood, meaningful names as these will appear in your reports.

**FUNNEL STEPS**

+ Add funnel step

Submit Cancel

### Step 3: Create Tags and Triggers

1. Sign in to your Google Tag Manager account, and create the following triggers:

#### Google Tag Manager Triggers

NAME	EVENT TYPE	FILTER
AddToCart	Custom Event	
Checkout	Custom Event	
Checkout only	Page View	Page URL matches RegEx /checkout/.*
CheckoutOption	Custom Event	
gtm.dom	Custom Event	
ProductClick	Custom Event	
PromotionClick	Custom Event	
RemoveFromCart	Custom Event	

2. Create the following Universal Analytics tags with the same **basic configuration**.

#### Universal Analytics Tags

NAME	TYPE	FIRING TRIGGERS
Add to cart tracking	Universal Analytics	AddToCart
Checkout option tracking	Universal Analytics	CheckoutOption
Checkout tracking	Universal Analytics	Checkout
Pageview tracking	Universal Analytics	gtm.dom
Product client tracking	Universal Analytics	ProductClick
Promo click tracking	Universal Analytics	PromotionClick
Remove from cart tracking	Universal Analytics	RemoveFromCart

**Basic Tag Configuration**

SETTING	VALUE
Product	Google Analytics
Tag Type	Universal Analytics
Tracking ID	UA-XXX (The tracking ID from your Universal Analytics account.)
Enable Enhanced Ecommerce Features	True
Use data layer	True
Use Debug version	True

3. Complete the individual tracking configurations as follows:

- a. Enter the following **Add to Cart** tracking settings:

**Add to Cart Configuration**

SETTING	VALUE
Track Type	Event
Category	Ecommerce
Action	Add to Cart
Trigger	AddToCart

- b. Enter the following **Checkout option** tracking settings:

**Checkout Option Configuration**

SETTING	VALUE
Track Type	Event
Category	Ecommerce
Action	Checkout Option
Trigger	CheckoutOption

- c. Enter the following **PageView** tracking settings:

**Page View Configuration**

SETTING	VALUE
Track Type	PageView
Trigger	gtm.dom

- d. Complete the following **Product Click** tracking configuration:

**Product Click Configuration**

SETTING	VALUE
Track Type	Event
Category	Ecommerce
Action	Product Click
Trigger	ProductClick

- e. Complete the following **Promotion Click** tracking configuration:

**Promotion Click Configuration**

SETTING	VALUE
Track Type	Event
Category	Ecommerce
Action	Promotion Click
Trigger	PromotionClick

- f. Complete the following **Remove from Cart** tracking configuration:

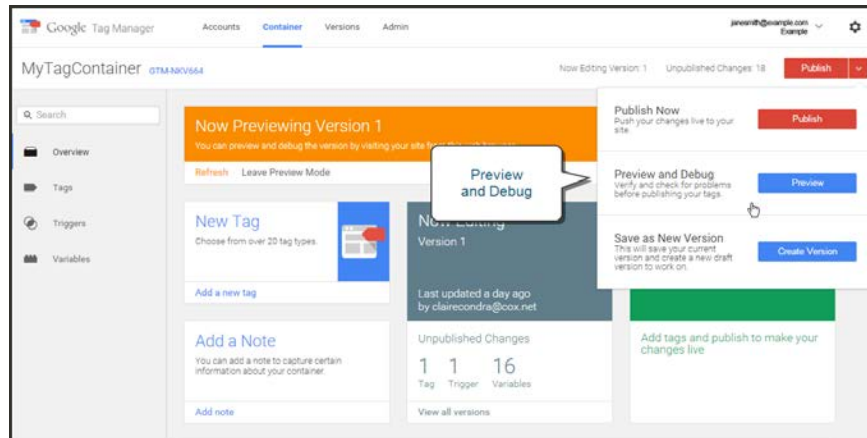
**Remove from Cart Configuration**

SETTING	VALUE
Track Type	Event
Category	Ecommerce
Action	Remove from Cart
Trigger	RemoveFromCart

4. When complete, tap **Preview** and verify that the tags work correctly.
5. When complete, tap **Publish**.

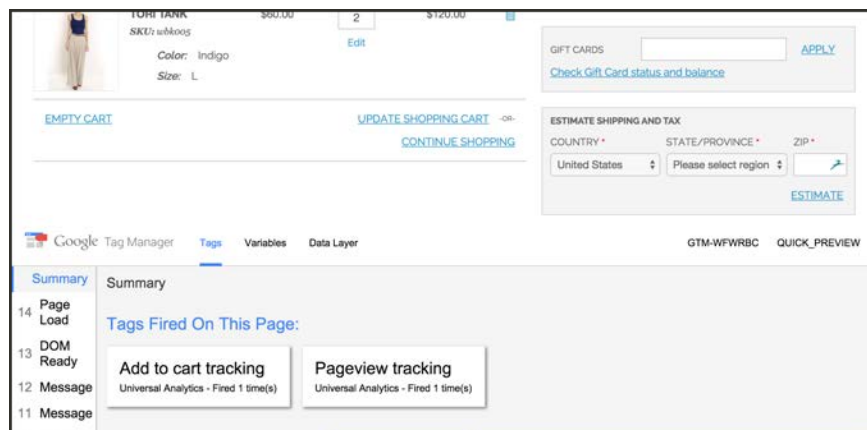
## Troubleshooting Tools

Both Google Tag Manager and Universal Analytics have debug modes with a variety of tools that you can use to troubleshoot your integration.



*Preview and Debug*

Tag Manager's debug preview mode shows tags as they are fired and their associated data layers.

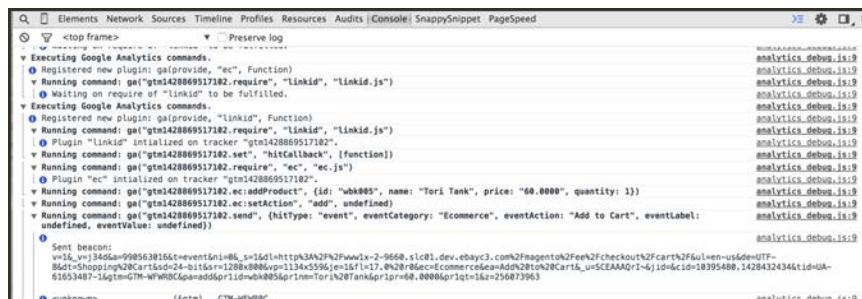


*Tags Fired During Checkout*

Google Analytics Enhanced Ecommerce makes it possible to send sales data, and information about product impressions and promotions to the data layer, along with any Google Analytics pageview or event. You can use the values in the data layer to measure impressions and analyze customer actions.

*Values in Data Layer*

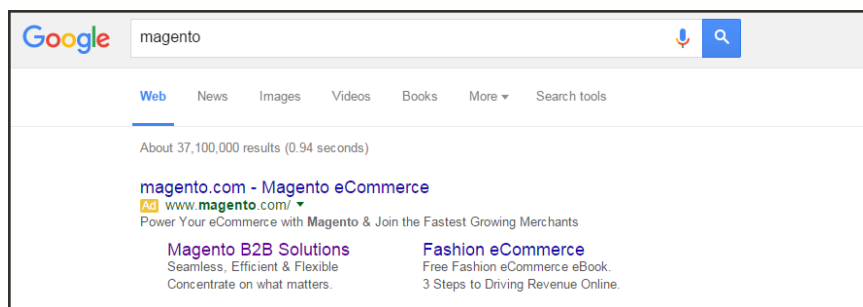
You also can use the JavaScript console in Chrome to see the output of events as it is sent to Google.

*Chrome JavaScript Console*

## Google AdWords

**Google AdWords** is a service that you can use to place ads in Google Search results and on the pages of companies in the Google Display Network. The AdWords dashboard includes tools to manage your campaigns, track response, and measure results.

Conversion tracking shows how many ad clicks lead to a sale or other valuable action. The "Success" page that appears to your customer after an order has been submitted is used to track conversions because it appears only after a sale. After completing the Google AdWords configuration for your store, there is no need to copy the conversion tracking script to the "Success" page, because Magento already has the necessary information. To learn more, see [Google AdWords Help](#).



*Magento Ad in Google Search Results*

### Step 1: Create a Google AdWords Campaign

1. Visit **Google AdWords**, and sign up for an account.
2. Follow the instructions to create a campaign.
3. To set up conversion tracking for your campaign, do the following:
  - a. On the **Tools** tab of your AdWords dashboard, choose **Conversions**. Then, tap **Conversion**.
  - b. When prompted for the conversion source, choose **Website**
  - c. Enter a name for the conversion action that you want to track. Then, tap **Done**.
  - d. Click **Value**. Then if applicable, assign a value to the conversion. For example,
    - If you make \$5 on each sale, choose "Each time it happens," and assign a value of \$5.
    - If the value of each sale varies, leave the value blank.
 Then, tap **Done**.
  - e. Tap **Conversion windows**, and complete the settings to determine how long the conversions are to be tracked, the reporting category, and attribution model.
4. When complete, tap **Save and Continue**.



## Step 2: Get Your Conversion Tag

1. Under **Install your tag**, choose to count conversions on **Page load**.
2. As an option, you can add the **Google Site Stats** notification to the conversion page. The notification appears in the lower corner with a link to Google's security standards and cookie usage.
3. To choose how you want to manage the your AdWords tag, do one of the following:
  - If you plan to add the script to your store yourself, choose **Save instructions and tag**.
  - If you plan to have someone else add the script to your store , choose **Email instructions and tag**.
4. When complete, tap **Done**.

## Step 3: Configure Your Store

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. If configuring Google AdWords tor a specific store view, do the following:
  - a. In the upper-left corner, choose the **Store View** that is to be configured.
  - b. When prompted to confirm scope switching, tap **OK**.
3. In the panel on the left, under **Sales**, choose **Google API**. Then, expand ☑ the **Google AdWords** section and do the following:
  - a. If necessary, clear the **Use Website** checkbox for each setting to be changed.
  - b. Set **Enable** to “Yes.”:
  - c. Enter the **Conversion ID** from your Google AdWords script.

Setting	Value	Use system value
Enable	Yes	<input type="checkbox"/>
Conversion ID		
Conversion Language	English / English (en)	<input checked="" type="checkbox"/>
Conversion Format	2	<input checked="" type="checkbox"/>
Conversion Color	FFFFFF	<input checked="" type="checkbox"/>
Conversion Label		
Conversion Value Type	Constant	<input type="checkbox"/>
Conversion Value	0	<input checked="" type="checkbox"/>

*Google AdWords*

4. To format the Google Sites Stat notification, do the following:
  - a. Set **Conversion Language** to the language that is identified in your Google AdWords script.
  - b. Enter the **Conversion Format** to be used for the Google Sites Stat notification on the conversion page.
    - 1 Displays a one-line notification with a link to more information about Google tracking.
    - 2 Displays a two-line notification with a link to more information about Google tracking.
    - 3 Displays no customer notification.
  - c. Enter the **hexadecimal code** for the **Conversion Color** that you want to use for the Google Site Stats notification label.
  - d. Enter the encrypted text for the **Conversion Label** that appears on the Google Sites Stat notification.

For example: M1EYCOKBnGoQz6CZoAM

### Sample Google AdWords Tag Code

```
<!-- Google Code for Back to School Sale Conversion Page -->
<script type="text/javascript">
/*  */
var google_conversion_id = 999999999;
var google_conversion_language = "en";
var google_conversion_format = "3";
var google_conversion_color = "ffffff";
var google_conversion_label = "M1EYCOKBnGoQz6CZoAM";
var google_remarketing_only = false;
/* ]]&gt; */
&lt;/script&gt;

&lt;script type="text/javascript"
src="//www.googleadservices.com/pagead/conversion.js"&gt;
&lt;/script&gt;

&lt;noscript&gt;
&lt;div style="display:inline;"&gt;</pre>
</div>
<div data-bbox="94 942 316 960" data-label="Page-Footer">Magento Commerce User Guide</div>
<div data-bbox="892 942 936 959" data-label="Page-Footer">dclix</div>
```

```


</div>
</noscript>
```

5. Set **Conversion Value Type** to one of the following:

Dynamic	Determines that a conversion has occurred based on the dynamic Order Amount value.
Constant	Determines that a conversion has occurred based on a specific value entered.

For a Constant conversion value type, enter a specific **Value** for the Order Amount to qualify as a conversion.

6. When complete, tap **Save Config.**

#### Step 4: Verify the Configuration

Within a few hours, the tracking status in your Google AdWords dashboard changes from "Unverified" to "No recent conversions" or "Recording conversions." When someone clicks your ad and makes a purchase, the conversion appears on the Conversion Actions page of your dashboard and campaign report.

# CONTENT

## Content Elements

In this section of the guide, you'll learn how to create and manage content pages and blocks, and use variables and widgets to add dynamic content.

### Content Menu

#### Pages

- Core Content Pages

- Workspace Controls

- Adding a New Page

- Using the Editor

  - Inserting a Link

  - Inserting an Image

  - Inserting a Widget

  - Inserting a Variable

  - Configuring the Editor

- Adding a Lightbox or Slider

- Using Media Storage

- Page Hierarchy

  - Configuring Page Hierarchy

  - Adding a Node

#### Blocks

- Adding a New Block

- Adding Social Plugins

- Positioning Blocks on a Page

#### Banners

- Creating a Banner

- Rotating Banners

- Using Banners in Price Rules

#### Widgets

- Widget Types

- Creating a Widget

  - New Products List

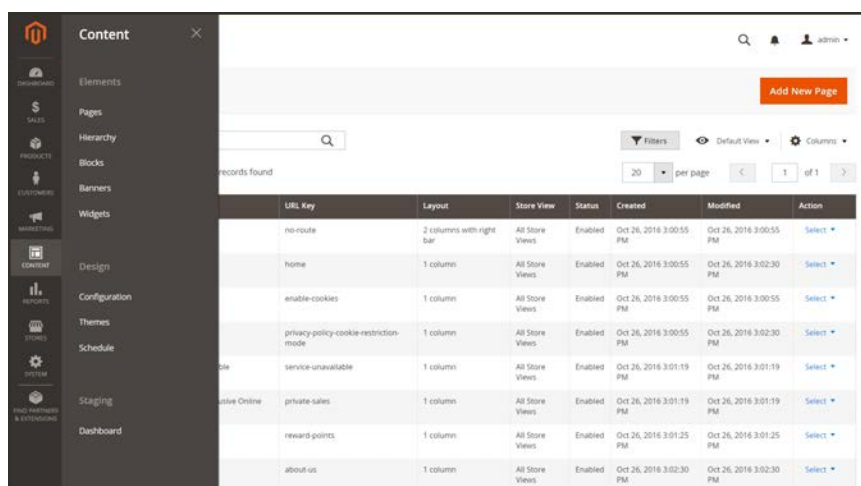
#### Design & Theme

## CHAPTER 40:

# Content Menu

The term **content marketing**<sup>1</sup> refers to the art of promoting your products or services by providing valuable information to your customers at no charge. The quality of your content helps distinguish your store from others, increases your visibility to search engines, and provides support to your customers. This soft-sell approach is often more effective than advertising, builds credibility and trust, and can turn your store into a destination. Content is still king.

Your content should reflect the branding of your store, and be delivered with your distinctive visual presentation and voice to convey your message. Use pictures to tell a story. Educate, inspire, and entertain. Keep in mind that with quality content, sometimes less is more.



The screenshot shows the Magento Admin interface with the 'Content' menu selected. The left sidebar contains various navigation options: Elements, Pages, Hierarchy, Blocks, Banners, Widgets, Design, Configuration, Themes, Schedule, Staging, and Dashboard. The main content area displays a table of content items.

URL Key	Layout	Store View	Status	Created	Modified	Action
no-route	2 columns with right bar	All Store Views	Enabled	Oct 26, 2016 3:00:55 PM	Oct 26, 2016 3:00:55 PM	Select
home	1 column	All Store Views	Enabled	Oct 26, 2016 3:00:55 PM	Oct 26, 2016 3:02:30 PM	Select
enable-cookies	1 column	All Store Views	Enabled	Oct 26, 2016 3:00:55 PM	Oct 26, 2016 3:00:55 PM	Select
privacy-policy-cookie-restriction-mode	1 column	All Store Views	Enabled	Oct 26, 2016 3:00:55 PM	Oct 26, 2016 3:02:30 PM	Select
service-unavailable	1 column	All Store Views	Enabled	Oct 26, 2016 3:01:19 PM	Oct 26, 2016 3:01:19 PM	Select
private-sales	1 column	All Store Views	Enabled	Oct 26, 2016 3:01:19 PM	Oct 26, 2016 3:01:19 PM	Select
reward-points	1 column	All Store Views	Enabled	Oct 26, 2016 3:01:25 PM	Oct 26, 2016 3:01:25 PM	Select
about-us	1 column	All Store Views	Enabled	Oct 26, 2016 3:02:30 PM	Oct 26, 2016 3:02:30 PM	Select

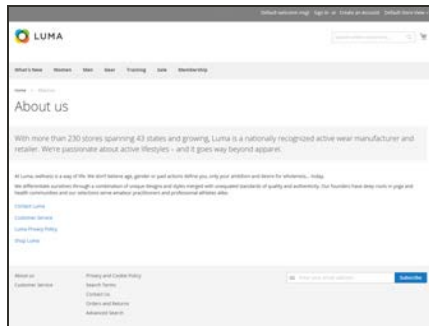
Content Menu

## To display the Content menu:

On the Admin sidebar, tap **Content**.

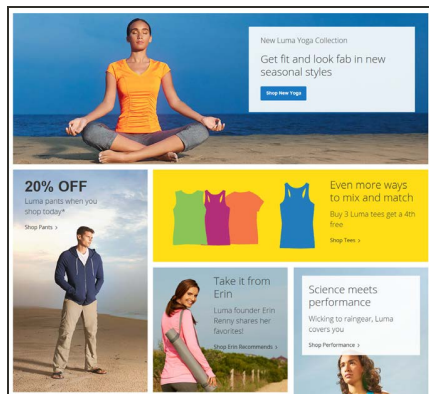
<sup>1</sup>The art of promoting products or services by providing valuable information at no charge.

## Menu Options



## Pages

Create pages with text, images, blocks, variables, and widgets, that can be incorporated into the navigation of your store, and linked to other pages. Then, organize your pages into a **hierarchy** with navigation.



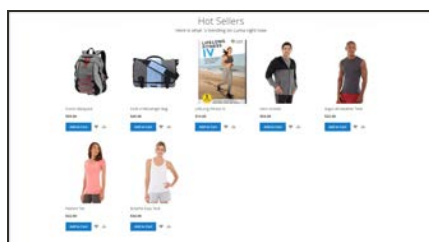
## Blocks

Create blocks of content without writing any code. Blocks can contain text, images, and even video, and can be assigned to any part of the page layout.



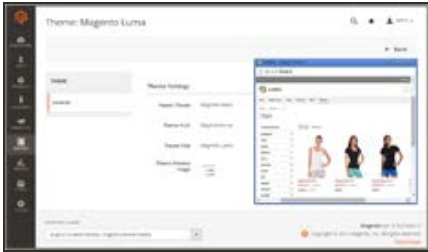
## Banners

Create banners that are triggered by promotions and that appear only to customers in specific, targeted **segments**.



## Widgets

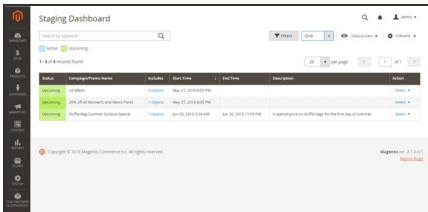
Display dynamic data and add blocks, links, and interactive elements most anywhere in your store.



## Design

---

Learn to manage the visual presentation of your store, apply themes, and schedule design changes.



## Staging

---

Content Staging gives your business team the ability to easily create, preview, and schedule a wide range of content updates directly from the Admin of your store.







## CHAPTER 41:

# Pages

All content can be viewed in terms of its shelf life, just as any product in a store. Did you know that the shelf life of social media content is less than twenty-four hours? The potential shelf life of the content you create can help you decide where to invest your resources.

Content with a long shelf life is sometimes referred to as **evergreen content**<sup>1</sup>. Examples of evergreen content include customer success stories, "how to" instructions, and Frequently Asked Questions (FAQ.) In contrast, content is perishable by nature includes events, industry news, and press releases.

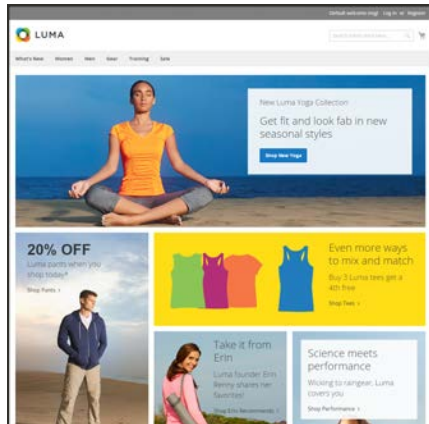
---

<sup>1</sup>Content that has a long shelf life.

# Core Content

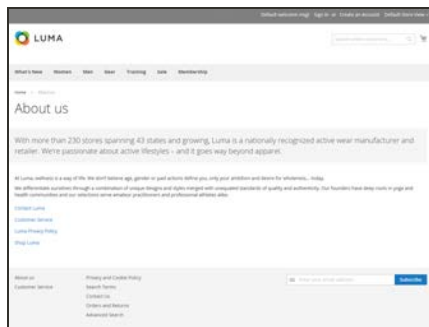
The Magento demo store has examples of core content pages to help you get started. Take a look at the following pages in your store, to make sure that the content conveys your message, voice, and brand.

## Content Pages



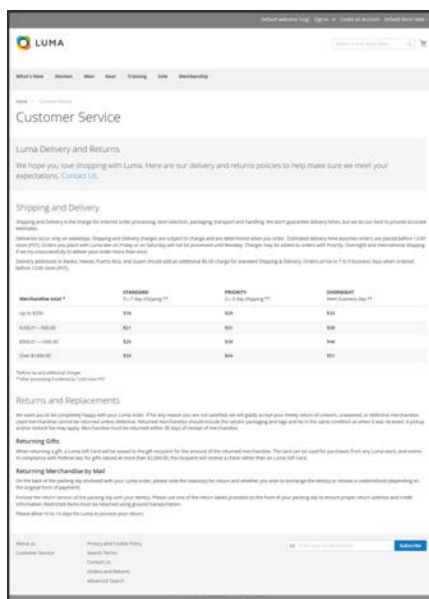
## Home

The demo “Home” page includes a banner, an image carousel, several static blocks with links, and a list of new products.



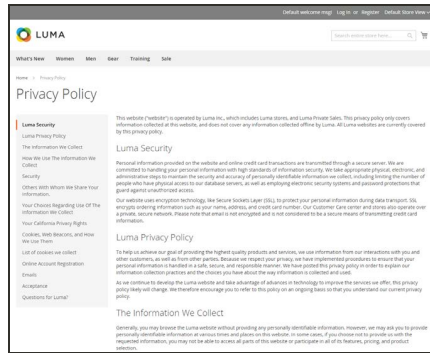
## About Us

The “About Us” page is linked from the footer of your store. You can include images, video, links to press releases and announcements. The sample page has an image on the right, and one of a decorative sort to indicate the end of the page.



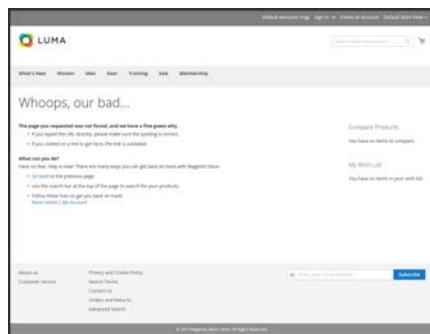
## Customer Service

The “Customer Service” page is another node in the page hierarchy. The two headers on the page have content that only becomes visible when the header is clicked.



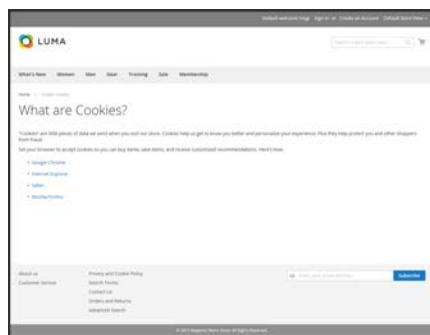
## Privacy Policy

Your store's "Privacy Policy" page should be updated with your own information. As a best practice, your privacy policy should explain to your customers the type of information that your company collects and how it is used.



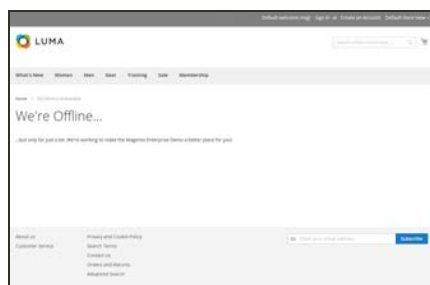
## 404 Not Found

The "404 Page Not Found" page is named for the response code that is returned when a page cannot be found. URL redirects reduce the number of times that this page appears. However, for those times when it is necessary, you might as well take advantage of the opportunity to offer some links to products that the customer might find interesting.



## Enable Cookies

The "Enable Cookies" page appears when visitors to your site do not have cookies enabled in their browsers. The page provides step-by-step, illustrated instructions to enable cookies for the most popular browsers.




## Service Unavailable

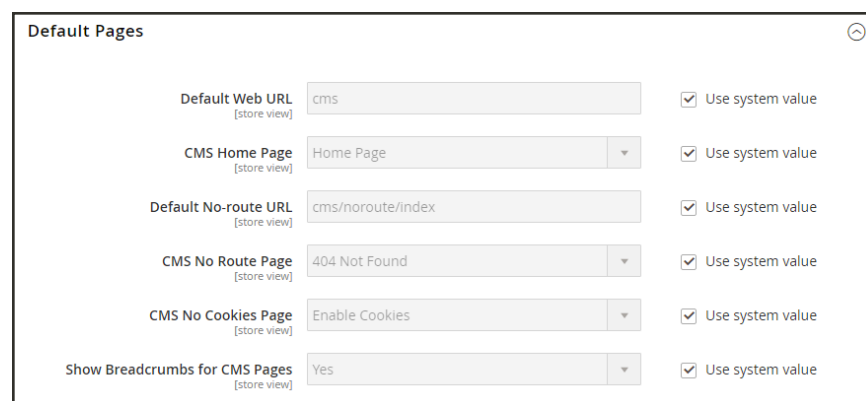
The "503 Service Unavailable" page is named for the response code that is returned when the server is unavailable.

## Default Pages

The Default Pages configuration determines the landing page that is associated with the **base URL**, and the corresponding home page. It also determines which page appears when a “Page Not Found” error occurs, and if a **breadcrumb trail** appears at the top of each page.

### To configure the default pages:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Web**.
3. Expand  the **Default Pages** section. Then, do the following:



Field	Value	Use system value
Default Web URL [store view]	cms	<input checked="" type="checkbox"/>
CMS Home Page [store view]	Home Page	<input checked="" type="checkbox"/>
Default No-route URL [store view]	cms/noroute/index	<input checked="" type="checkbox"/>
CMS No Route Page [store view]	404 Not Found	<input checked="" type="checkbox"/>
CMS No Cookies Page [store view]	Enable Cookies	<input checked="" type="checkbox"/>
Show Breadcrumbs for CMS Pages [store view]	Yes	<input checked="" type="checkbox"/>

### Default Pages

- a. In the **Default Web URL** field, enter the relative path to the folder in the Magento installation that contains the landing page. The default value is “cms.”

For a specific store view, clear the **Use Default** checkbox next to the Default Web URL field, and any other default fields to be changed.

- b. Set **CMS Home Page** to the CMS page to be used as the home page.
  - c. In the **Default No-route URL** field, enter the relative path to the folder in the Magento installation where the page is redirected when a “404 Page Not Found” error occurs. The default value is “cms/index/noRoute.”
  - d. Set **CMS No Route Page** to the CMS page that appears when a “404 Page Not Found” error occurs.
  - e. Set **CMS No Cookies Page** to the CMS page that appears when cookies are disabled in the browser.
  - f. If you want a breadcrumb trail to appear at the top of all CMS pages, set **Show Breadcrumbs for CMS Pages** to “Yes.”
4. When complete, tap **Save Config.**

## Workspace Controls

The page workspace includes tools to help you quickly find the pages you need, and commands to perform routine maintenance on individual or multiple pages. You can also quickly update page properties from the grid.

ID	Title	URL Key	Layout	Store View	Status	Created	Modified	Action
1	404 Not Found	no-route	2 columns with right bar	All Store Views	Enabled	Sep 8, 2016 10:20:09 AM	Sep 8, 2016 10:20:09 AM	Select
2	Home Page	home	1 column	All Store Views	Enabled	Sep 8, 2016 10:20:09 AM	Sep 8, 2016 10:21:37 AM	Select
3	Enable Cookies	enable-cookies	1 column	All Store Views	Enabled	Sep 8, 2016 10:20:09 AM	Sep 8, 2016 10:20:09 AM	Select
4	Privacy Policy	privacy-policy-cookie-restriction-mode	1 column	All Store Views	Enabled	Sep 8, 2016 10:20:09 AM	Sep 30, 2016 9:57:39 AM	Select
5	About us	about-us	1 column	All Store Views	Enabled	Sep 8, 2016 10:21:37 AM	Sep 8, 2016 10:21:37 AM	Select
6	Customer Service	customer-service	1 column	All Store Views	Enabled	Sep 8, 2016 10:21:37 AM	Sep 8, 2016 10:21:37 AM	Select

*Pages Grid*

### To quickly update page properties:

1. Click any row in the grid. To select multiple records, mark the checkbox of each row that you want to update.

ID	Title	URL Key	Layout	Store View	Status	Created	Modified	Action
1	404 Not Found	no-route	2 columns with right bar	All Store Views	Enabled	Sep 8, 2016 10:20:09 AM	Sep 8, 2016 10:20:09 AM	Select
2	Home Page	home	1 column	All Store Views	Enabled	Sep 8, 2016 10:20:09 AM	Sep 8, 2016 10:21:37 AM	Select
3	Enable Cookies	enable-cookies	1 column	All Store Views	Enabled	Sep 8, 2016 10:20:09 AM	Sep 8, 2016 10:20:09 AM	Select
4	Privacy Policy	privacy-policy-cookie-restriction-mode	1 column	All Store Views	Enabled	Sep 8, 2016 10:20:09 AM	Sep 30, 2016 9:57:39 AM	Select
5	About us	about-us	1 column	All Store Views	Enabled	Sep 8, 2016 10:21:37 AM	Sep 8, 2016 10:21:37 AM	Select
6	Customer Service	customer-service	1 column	All Store Views	Enabled	Sep 8, 2016 10:21:37 AM	Sep 8, 2016 10:21:37 AM	Select


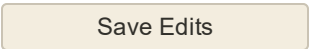
*Update Page Properties*

2. Update any of the following properties:

- Title
- URL Key
- Status
- Layout

3. When complete, tap **Save**.

## Workspace Controls

CONTROL	DESCRIPTION
	Adds a new page.
Search	Initiates a catalog search based on the current filters.
Actions	Lists all actions that can be applied to selected items in the list. To apply an action to a page, or to multiple pages, mark the checkbox in the first column of each record that is subject to the action. Options: Delete Disable Enable Edit
Select	The control in the header of the first column can be used to select multiple records as the target of action. Mark the checkbox in the first column of each record that you want to select. Options: Select All / Deselect All
	Applies the current action to selected records.
Edit	Opens the record in edit mode. You can accomplish the same thing by clicking anywhere on the row.

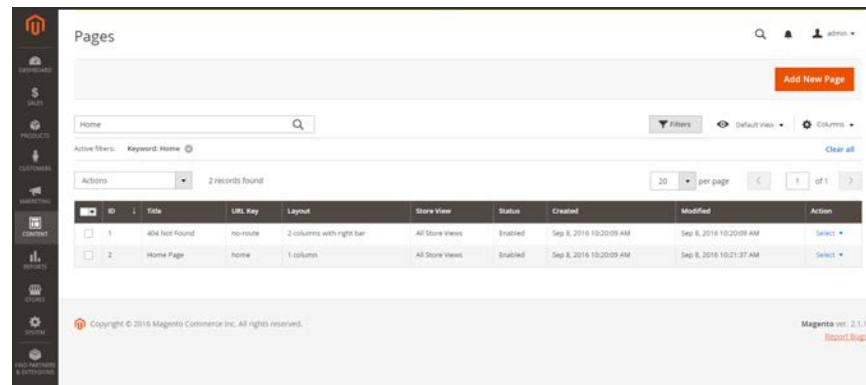
## Columns

COLUMN	DESCRIPTION
Select	The checkbox in the first column is used to select multiple records: Options: Select All Deselect All
ID	The ID is an incrementing number that is assigned to each page.
Title	The page title appears at the top of each page.
URL Key	The URL key is similar to a file name, and identifies the page in the URL.
Layout	Determines if the page appears with sidebars to the right or left of the main content area. Options: 1 column 2 columns with left bar 2 columns with right bar 3 columns Empty
Store View	Can be used to associate the page with a specific store view.
Status	Indicates if the page is currently online or offline. Options: Enabled / Disabled
Created	The date the page was created.
Modified	The data the page was last modified.
Action	The actions that can be applied to an individual record include:  <div> EditOpens the page in edit mode. </div> <div> DeleteDeletes the page. </div> <div> ViewDisplays the page in preview mode. </div>



## Page Search

The Search box in the upper-left of the page grid can be used to find specific pages by keyword. For a more advanced search, you can **filter** the search by multiple parameters.



*Keyword Search Results*

### To search by keyword:

1. Enter a search term into the page search box.
2. Tap **Search** (🔍) to display the results. The results include all pages that contain the keyword.

### To filter search:

1. If necessary, click **Clear All** to clear the previous search criteria.
2. Tap the **Filters** (▼) tab to display the selection of search filters.
3. Complete as many of the filters as necessary to describe the page(s) that you want to find.
4. Tap **Apply Filters** to display the results.

The screenshot shows the 'Pages' management interface in Magento 2. The 'Filters' tab is active, displaying various filter criteria for searching pages. The filters include:

- ID:** From and To fields.
- Created:** From and To date pickers.
- Modified:** From and To date pickers.
- Store View:** A dropdown menu set to 'All Store Views'.
- Title:** A text input field containing 'Home Page'.
- URL Key:** A text input field.
- Layout:** A dropdown menu set to 'Select...'.
- Status:** A dropdown menu set to 'Select...'.

Below the filter fields, there is a 'Cancel' button and an 'Apply Filters' button. The results section shows '1 records found' and a table with the following data:

ID	Title	URL Key	Layout	Store View	Status	Created	Modified	Action
2	Home Page	home	1 column	All Store Views	Enabled	Sep 8, 2016 10:20:09 AM	Sep 8, 2016 10:21:57 AM	Select

The footer of the interface includes the copyright notice 'Copyright © 2016 Magento Commerce Inc. All rights reserved.' and the version 'Magento ver. 2.1.1'.

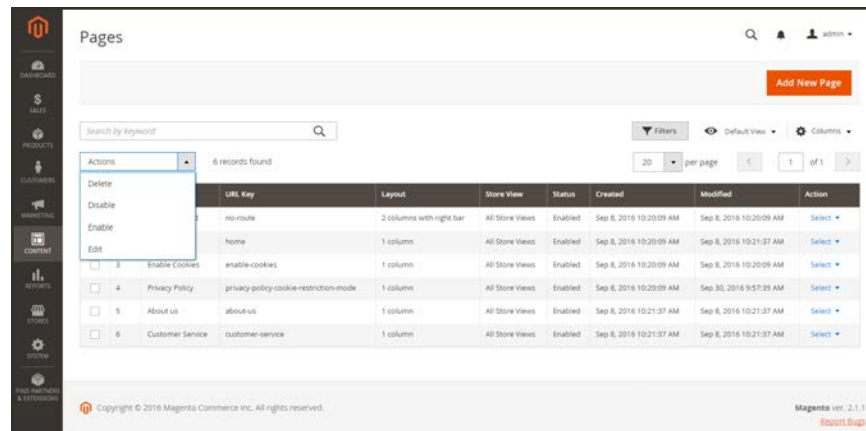
*Filtered Search*

## Search Filters

FILTER	DESCRIPTION
ID	Filter the search by page record ID.
Title	Filter the search based on the page title.
URL Key	Filter the search by the URL Key.
Created	Filter the search by the date the page was created.
Modified	Filter the search based on the date the page was last modified.
Store View	Filter the search based on store view. Options: (All available Store Views)
Layout	Filter the search based on page layout. Options:
	1 column
	2 columns with left bar
	2 columns with right bar
	3 columns
	Empty
Status	Filter the search on the page status. Options: Disables / Published
<div data-bbox="323 1073 630 1121">Apply Filters</div>	Applies all filters to the search.
<div data-bbox="323 1148 630 1197">Cancel</div>	Cancels the current search.
Clear All	Clears all search filters.

## Page Actions

Pages can be edited, disabled, enabled, and deleted. To apply an action to an individual page, mark the checkbox in the first column. To select or deselect all pages, use the mass actions control at the top of the column.

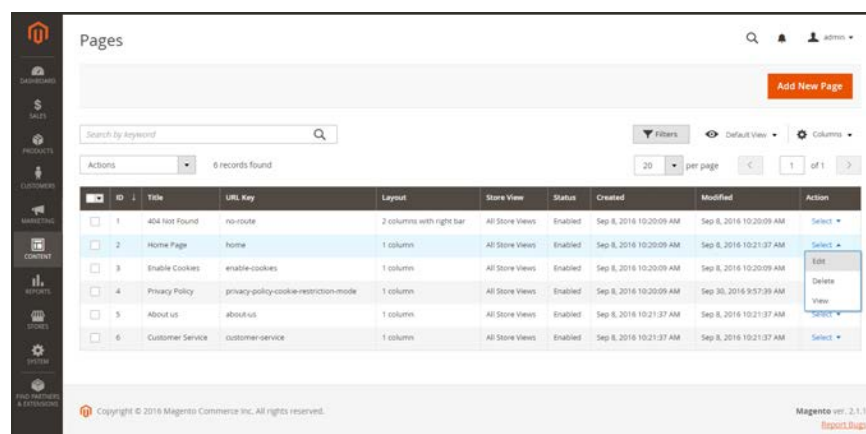


*Page Actions*

### To apply an action:

The Action column on the far right can be used to apply any of the following actions to the individual page:

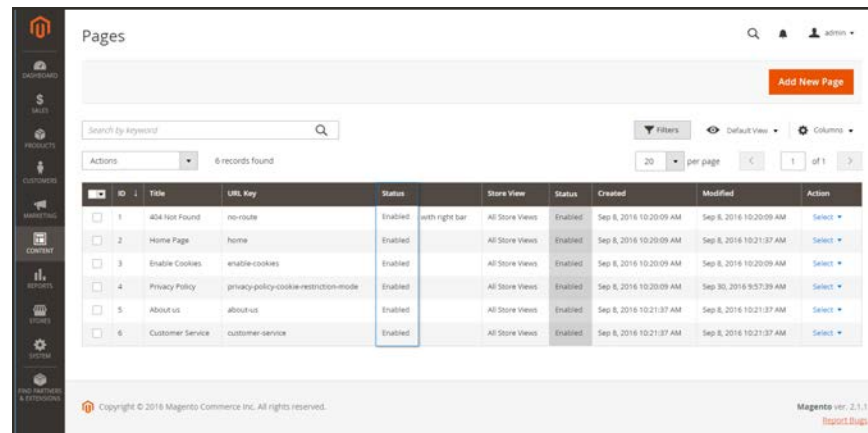
- Edit
- Delete
- View



*Single Page Actions*

## Page Grid Layout

The selection of columns and their order in the grid can be changed according to your preference. To keep the new column arrangement, you can save it as a view.



*Moving a Column*

### To change the selection of columns:

In the upper-right corner, tap the **Columns** (⚙️) control. Then, do the following:

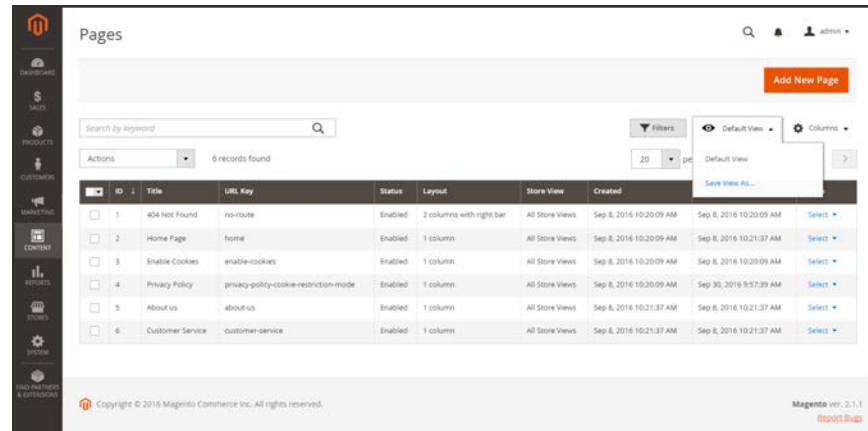
- Mark the checkbox of any column you want to add to the grid.
- Clear the checkbox of any column you want to remove from the grid.

### To move a column:

1. Tap the header of the column, and hold.
2. Drag the column to the new position, and release.

## To save a view:

1. Tap the **View** (👁) control. Then, tap **Save Current View**.



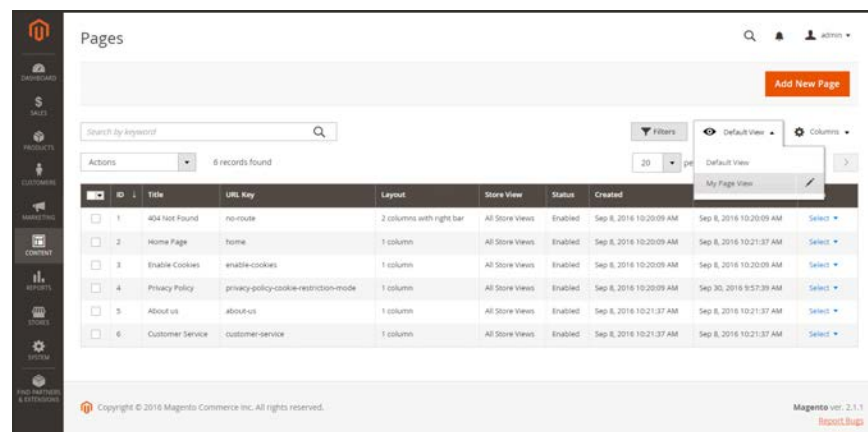
*Save Current View*

2. Enter a **name** for the view. Then, click the **arrow** (➔) to save all changes. The name of the view now appears as the current view.

## To change the view:

Tap the **View** (👁) control. Then, do one of the following:

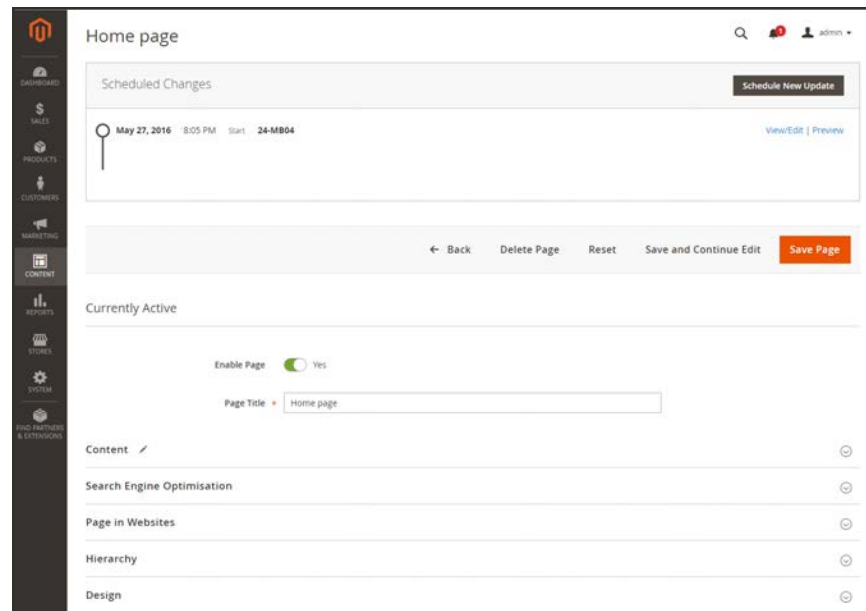
- Choose the view that you want to use.
- To change the name of a view, tap the **Edit** (✎) icon. Then, update the name.



*Choose a View*

## Scheduled Changes

Page changes can be applied on schedule, and grouped with other content changes. You can create a new campaign based on scheduled changes to a page, or apply the changes to an existing campaign. To learn more, see: [Content Staging](#).

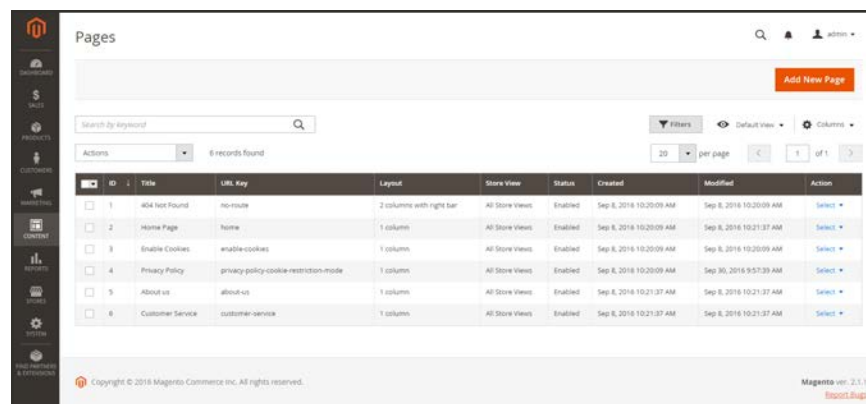


*Scheduled Changes*

## Adding a New Page

The process of adding a new content page to your store is essentially the same for any type of page you might want to create. You can include text, images, blocks of content, variables, and widgets. Most content pages are designed to be read by search engines first, and by people second. Keep the needs of each of these two very different audiences in mind when choosing the page title, and URL, and when composing the meta data, and content.

The following instructions walk you through each step to create a basic page. Some advanced features are skipped over, but are covered in other topics.



*Pages*

### Process Overview:

- Step 1: **Add a New Page**
- Step 2: **Complete the Content**
- Step 3: **Complete the SEO Information**
- Step 4: **Define the Scope**
- Step 5: **Make Design Changes** (Optional)
- Step 6: **Preview the Page**
- Step 7: **Publish the Page**

### Step 1: Add a New Page

1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Pages**.
2. Tap **Add New Page**.



*New Page*

3. On the new page, do the following:
  - a. By default, a new page is published when the record is saved. If you do not want to publish the page immediately, set **Enable Page** to "No."
  - b. Enter the **Page Title**. The Page Title is the name that appears in the **breadcrumb trail** navigation.
4. To schedule design changes, expand ☺ the **Custom Design Update** section. Then, do the following:
  - a. Use the calendar (📅) to choose the **From** and **To** dates when the design change is to be in effect.
  - b. If applicable, set **New Theme** to a different theme that is to be used for the page.
  - c. If applicable, set **New Layout** to one of the following:
    - 1 column
    - 2 columns with left bar
    - 2 columns with right bar
    - 3 columns
    - Empty

*Custom Design Update*

## Step 2: Complete the Content

1. Expand ☑ the **Content** section.



Content

2. In the **Content Heading** box, type the heading that you want to appear at the top of the page.
3. By default, the editor opens in WYSIWYG mode with the toolbar at the top.
  - If you prefer to work directly with the HTML code, tap **Show / Hide Editor**.
4. Complete the content and format the text as needed. You can add **images**, **variables**, and **widgets** as needed. To learn more, see: **Using the Editor**.
5. Tap **Save and Continue Edit**.

## Step 3: Complete the SEO Information


1. Expand ☑ the **Search Engine Optimization** section. Then, do the following:
  - a. When the page was saved, a default URL key was created that is based on the Content Heading. You can accept the default, or enter another **URL Key** that consists of all lowercase characters, with hyphens instead of spaces.
  - b. Enter a **Meta Title** for the page. The Meta Title should be less than seventy characters in length, and appears in the browser title bar and tab.
  - c. Enter your choice of high-value **Meta Keywords** that search engines can use to index the page. Separate multiple words with a comma. Meta keywords are ignored by some search engines, but used by others.
  - d. In the **Meta Description** field, enter a brief description of the page for search results listings. Ideally, the description should be from 150-160 characters in length, with a maximum limit of 255.

A screenshot of the 'Search Engine Optimisation' form. It contains four input fields: 'URL Key', 'Meta Title', 'Meta Keywords', and 'Meta Description'. Each field is represented by a rectangular text box with a small icon on the right side of the label.

*Search Engine Optimization*

2. Tap **Save and Continue Edit.**

**Step 4: Define the Scope of the Page**

1. Expand  the **Page in Websites** section.
2. In the **Store View** list, select each view where the page is to be available. If the installation has multiple websites, select each website and store view where the page is to be available.

A screenshot of the 'Page in Websites' form. It shows a 'Store View' dropdown menu that is expanded, displaying a list of store views: 'All Store Views', 'Main Website', 'Main Website Store', 'English', 'French', 'German', and 'Spanish'.

*Pages in Websites*

**Step 5: Enter Any Design Changes (Optional)**

1. Expand the  **Design** section. Then, do the following:

A screenshot of the 'Design' form. It contains two input fields: 'Layout' and 'Layout Update XML'. The 'Layout' field is a dropdown menu currently showing '1 column'. The 'Layout Update XML' field is a large text area.

*Design*

- a. To change the **page layout**, set **Layout** to one of the following:
  - 1 column
  - 2 columns with left bar
  - 2 columns with right bar
  - 3 columns
  - Empty
- b. To include additional **layout instructions**, enter valid XML code in the **Layout Update XML** box.

### Step 6: Preview the Page

1. To return to the Pages grid, tap **Save Page**.
2. Find the page in the grid. Then in the **Action** column, select **View**.
3. To return to the grid, tap **Back** in the upper-left corner of the browser window.

### Step 7: Publish the Page

1. In the **Action** column of the grid, select **Edit**.
2. Set **Enable Page** to "Yes."
3. Tap **Save Page**.

Now that your page is complete, it can be added to your store navigation, linked to other pages, or added as a link in the footer of your store. You can also use it as your new **home page**.

# Switching Home Pages

You can maintain a selection of different home pages, and activate the page that you want to use as the default home page.

## To Change the Home Page:

- 1. Complete the steps to add a new **page**.
- 2. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
- 3. In the panel on the left under **General**, choose **Web**.
- 4. Expand ☑ the **Default Pages** section. Then, do the following:

Default Pages

Default Web URL  
[store view]

cms

☒ Use system value

CMS Home Page  
[store view]

Home Page

☒ Use system value

Default No-route URL  
[store view]

cms/noroute/index

☒ Use system value

CMS No Route Page  
[store view]

404 Not Found

☒ Use system value

CMS No Cookies Page  
[store view]

Enable Cookies

☒ Use system value

Show Breadcrumbs for CMS Pages  
[store view]

Yes

☒ Use system value

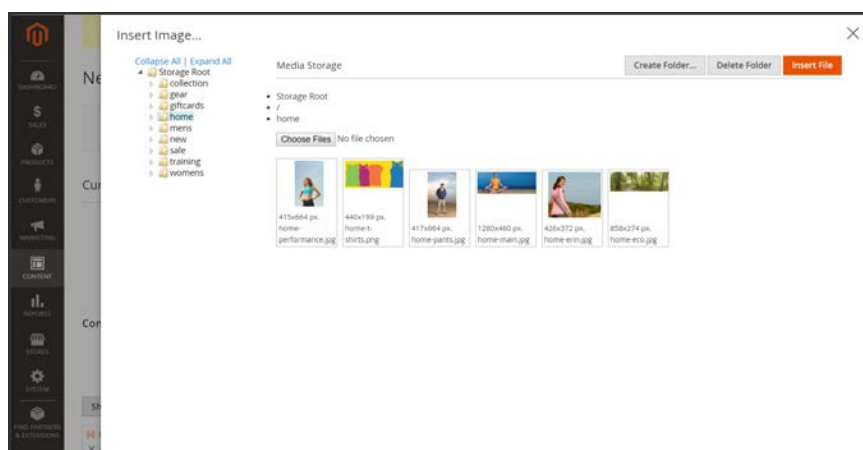
Default Pages

- a. Set **CMS Home Page** to the new page.
  - b. Tap **Save Config**.
- 5. In the message at the top of the workspace, tap the **Cache Management** link, and refresh any invalid caches.

## Media Storage

Media storage helps you organize and gain access to media files that are stored on the server. The path to the location of the files is determined by the **Base URL** configuration. Files in media storage can be accessed from the editor while working on pages and static blocks. Media storage is usually located in the file system on the same server as the Magento program files.

Alternatively, media files can be managed in a **database**, or located on a separate server or **content delivery network**. The editor can be configured to use either static or **dynamic media URLs** for catalog content in category or product descriptions.





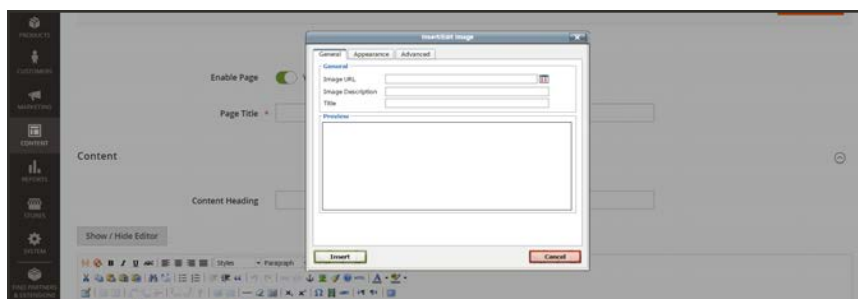
*Media Storage*

### To insert an image from media storage:

Open the page or block to be edited. Then, use one of the following methods to insert an image from media storage:

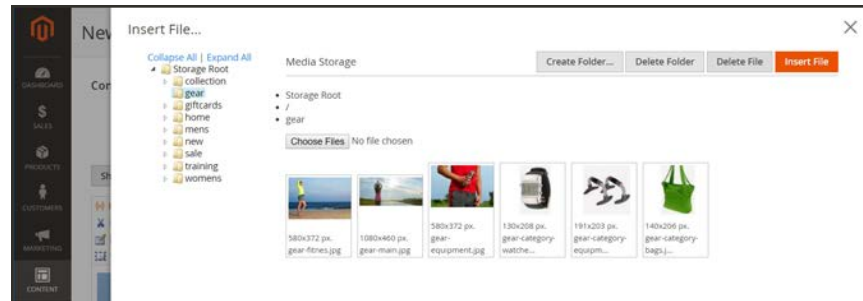
#### Method 1: From WYSIWYG Mode

1. On the toolbar of the WYSIWYG editor, click **Insert Image** (  ).
2. After the **Image URL** field, click **Browse** (  ).



*Insert Image (WYSIWYG Mode)*

3. In the directory tree on the left, navigate to the folder where the image is stored.
4. Select the tile of the image. Then, tap **Insert File**.



*Insert File*

### Method 2: From HTML Mode



1. Position the cursor in the code where the <img> tag is to be inserted.
2. Tap **Insert Image**.



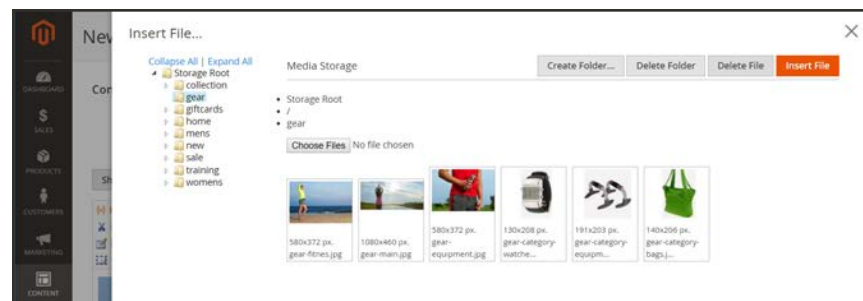
*Insert Image (HTML Mode)*

### To upload files to media storage:

The first two steps are the same as if you are inserting an image.

1. On the toolbar of the WYSIWYG editor, click **Insert Image** (  ).
2. After the **Image URL** field, click **Browse** (  ).
3. In the directory tree on the left, do one of the following:
  - Navigate to the folder where you want to save the uploaded image.
  - Navigate to the place where you want to create a new folder, and tap **Create Folder**. Then, enter the folder name, and tap **OK**.
4. To upload file(s) to media storage, tap **Choose Files**. Then, do the following:
  - a. In the directory of your local computer, navigate to the location of the images.
  - b. Select each image that is to be uploaded.
  - c. Tap **Open**.

The images are uploaded to the current media storage folder on the server.



*Media Storage*



## Using the Editor

The WYSIWYG editor gives you the ability to enter and format while working in a “What You See Is What You Get” view of the content. If you prefer to work directly with the underlying HTML code, you can easily change modes. The editor can be used to create content for pages, blocks, and product descriptions. When working in the product catalog, the editor is accessed by clicking the WYSIWYG Editor button. For a complete list of toolbar buttons, see: [Using the Editor](#) in the online guide.



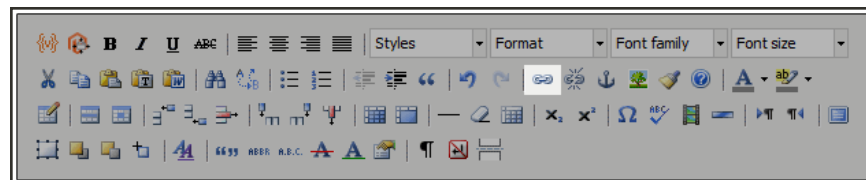
*Editor Toolbar*

## Inserting a Link

An easy way to insert a link is to use the Link button in the editor toolbar. It doesn't require any knowledge of HTML, and the result is the same.

### To insert a link:

1. Highlight the text where you want to create the link. Then, in the editor toolbar, tap the **Link** button.

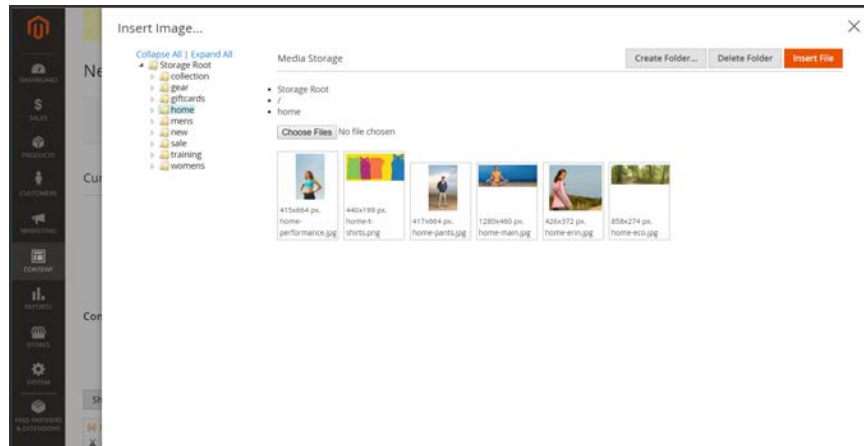


*Insert Link Button*

2. In the **Link URL** field, enter one of the following:
  - The **URL Key** of a page in your store.
  - The full **URL** of an external page to be linked.
3. Set **Target** to one of the following:
  - Open link in the same window
  - Open in a new window
4. In the **Title** field, enter the tooltip text to appear when someone hovers over the link.
5. Tap **Insert** to create the link.

## Inserting an Image

From the editor, you can insert an image that has been uploaded to **Media Storage**, or link to an image that resides on another server.



*Media Storage*

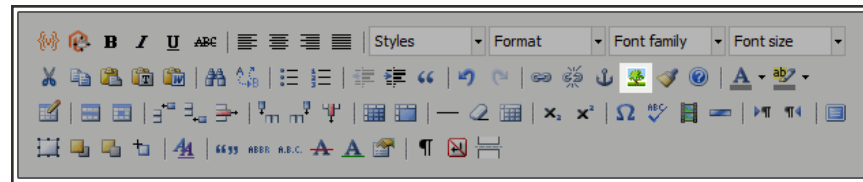
### Method 1: Insert an Image from Media Storage

1. If necessary, tap **Show / Hide Editor** to work directly with the code.
2. Position the cursor where you want the code for the image to be inserted. Then, tap **Insert Image**.
3. Choose the image that you want to use, and tap **Insert File**.
4. To view the image in WYSIWYG mode, tap **Show / Hide Editor** again.

### Method 2: Insert an Image from Another Server

Use this method to insert an image that is available online, but resides on another server. You must have the full URL of the image to complete the process.

1. If necessary, tap **Show / Hide Editor** to work in WYSIWYG mode.
2. Position your cursor where you want the image to appear.
3. On the Editor toolbar, tap the **Insert Image** button. Then, do the following:



*Insert Image Button*

- a. In the **Image URL** field, paste the full URL to the image on the other server.
  - b. In the **Image Description** field, enter a brief description of the image.
  - c. In the **Title** field, enter a relevant title for the image.
4. Tap **Insert** to complete the process.

## Inserting a Widget

The **Widget** tool can be used to add a variety of content elements to the page, including links to any content page or node, product, or category. Links can be positioned on the page in a block format, or incorporated directly into the content. You can use the Widget tool to create links to the following types of content:

- **Content Pages**
- **Catalog Categories**
- **Catalog Products**

By default, links inherit their style from the style sheet of the theme.

### To insert a widget:

1. Open the content page to be edited.
2. In the panel on the left, choose **Content**. Then, use either of the following methods:

#### Method 1: **WYSIWYG Mode**

1. Tap **Show / Hide Editor** to work in WYSIWYG mode.
2. Position the cursor in the text where you want the widget to appear.
3. On the editor toolbar, tap **Insert Widget**.

#### Method 2: **HTML Mode**

From the HTML editor, tap **Insert Widget**.

3. When prompted, choose the **Widget Type**. This example shows how to insert a link to a product.
4. To use the product name, leave the **Anchor Custom Text** field empty.

5. Enter a **Anchor Custom Title** for best SEO practice. (The title isn't visible on the page.)
  6. Set **Template** to one of the following:
    - To incorporate the link into text, select “Product Link Inline Template.”
    - To place the link on a separate line, select “Product Link Block Template.”
  7. Tap **Select Product**, and do the following:
    - a. In the tree, navigate to the category you want.
    - b. In the list, choose the linked product.
    - c. Click **Insert Widget** to place the link on the page. In the HTML, a **markup tag** for the link appears at the top of the page, enclosed in double curly braces.
    - d. If needed, use Cut (Ctrl + x) and Paste (Ctrl + v) to position the markup tag in the code where you want the link to appear.
  8. Tap **Show / Hide Editor** to see the link in WYSIWYG mode.
- You can continue editing the page, and incorporate other links into the content.

## Inserting a Variable

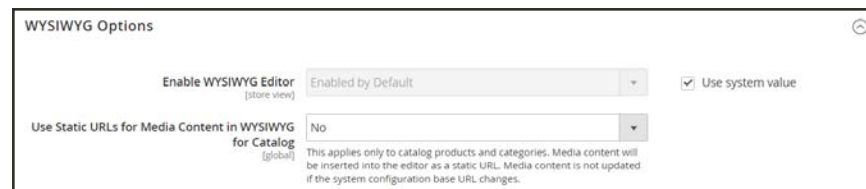
Your store includes many predefined **variables** that can be incorporated into content pages and other communications. In addition, you can include your own **custom variables** that are specific to your needs.

### To insert a variable on a page:

1. Do one of the following:
  - Open an existing page.
  - Create a new page.
2. In the panel on the left, choose **Content**. Then from the editor, do one of the following:
  - Position the cursor where you want the variable to appear, and tap **Insert Variable**.
  - If you prefer to work with the code, click **Show / Hide Editor**. Position the insertion point in the text where you want the variable to appear. Then, tap **Insert Variable**.
3. In the list of available variables, choose the one you want to insert into the page.
4. When complete, tap **Save**.


## Configuring the Editor

The WYSIWYG editor is enabled by default, and can be used to edit content on CMS pages and blocks, and in products and categories. From the configuration you can activate or deactivate the editor, and elect to use static—rather than **dynamic**—URLs for media content in product and category descriptions.



*WYSIWYG Options*

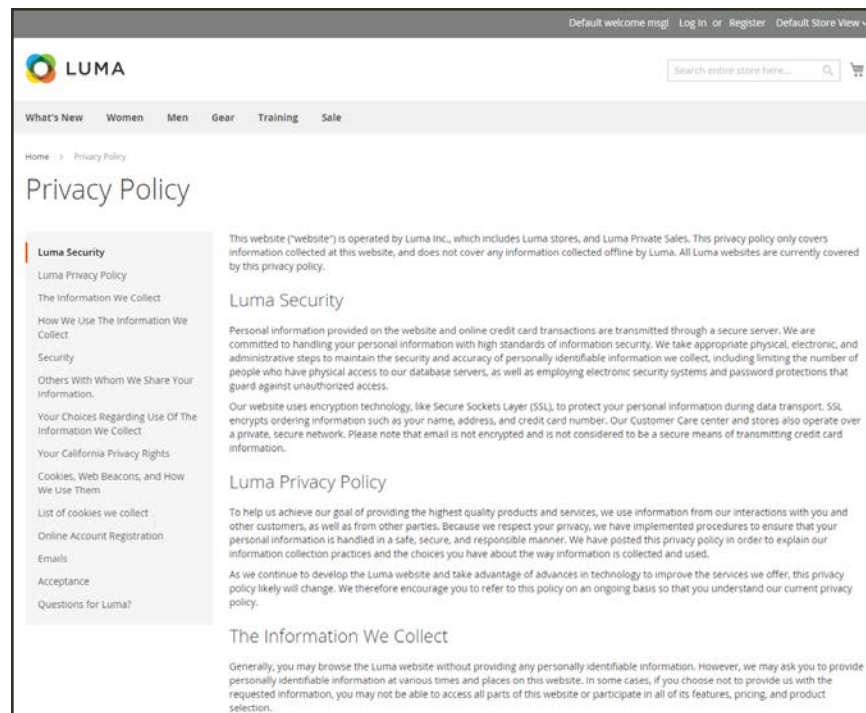
### To configure the editor:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Content Management**.
3. Expand  the **WYSIWYG Options** section, and do the following:
  - a. Set **Enable WYSIWYG Editor** to your preference. The editor is enabled by default.
  - b. Set **Static URLs for Media Content in WYSIWYG for Catalog** to your preference for **media content** that is included in category and product field descriptions.
4. When complete, tap **Save Config**.

## Page Hierarchy

Your store's page hierarchy system gives you the ability to organize your content pages and add pagination, navigation, and menus. The Privacy Policy page in the sample data is an example of a page with a menu on the left. If you publish a large amount of content on a regular basis, you can use page hierarchy to organize your content to make it easy for people to find articles of interest.

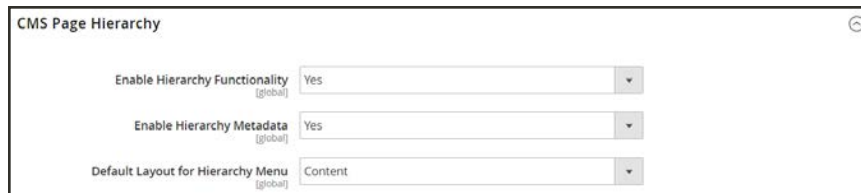
The page hierarchy system uses nodes to identify related pieces of content, and to organize content pages into a parent/child relationships. A parent node is like a folder that might contain child nodes and pages. The relative position of each node and page in the hierarchy is shown as a tree. A node might contain other nodes and content pages, and a single content page might be associated with multiple nodes and other content pages in a parent/child or neighbor relationships.



*Page with Left Navigation*

## Configuring Page Hierarchy


The configuration settings activate the page hierarchy system and metadata, and determine the default menu layout.

The image shows a configuration panel titled "CMS Page Hierarchy" with a close button in the top right corner. It contains three settings, each with a "Global" label and a dropdown menu:

- Enable Hierarchy Functionality**: Set to "Yes".
- Enable Hierarchy Metadata**: Set to "Yes".
- Default Layout for Hierarchy Menu**: Set to "Content".

*CMS Page Hierarchy*

### To configure page hierarchy:

1. On the sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **General**, choose **Content Management**.
3. Expand  the **CMS Page Hierarchy** section, and make any changes that are necessary.
4. When complete, tap **Save Config**.

## Adding a Node

The following example shows how to create a node with simple navigation to related content pages. Although the node does not have a content page that is associated with it, it does have a URL Key which can be referenced elsewhere in your site.

For example, you might create a node called “Press Releases” that has navigation to individual press releases. Then, you can include the link on your “About Us” page. Or you might create a node with links to back issues of your newsletter.

### Process Overview:

Step 1: **Create a Node**

Step 2: **Add Pages to the Node**

Step 3: **Add Navigation**

### Step 1: Create a Node

1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Hierarchy**.
2. Tap **Add Node**.
3. In the Page Properties section, type a **Title** for the node. Then enter a suitable **URL Key** in all lowercase characters, using hyphens instead of spaces.
4. Tap **Save Pages Hierarchy**. The node appears as a folder in the tree.

### Step 2: Add Pages to the Node

1. In the hierarchy tree, open the node.
2. Scroll down to the **CMS pages** section, and mark the checkbox of each page you want to include.
3. Click the **Add Selected Pages(s) to Tree** button. Each selected page appears in the tree below the node folder.

### Step 3: Add Navigation

1. In the tree, click to open the node.
2. In the Pagination Options for Nested Pages section, set **Enable Pagination** to “Yes.”
3. In the Navigation Menu Options section, and set **Enable Navigation Menu** to “Yes.”
4. Scroll back up to the Node Properties section, and click the **Preview** link.
5. Click the **Save Pages Hierarchy** button to save the settings.



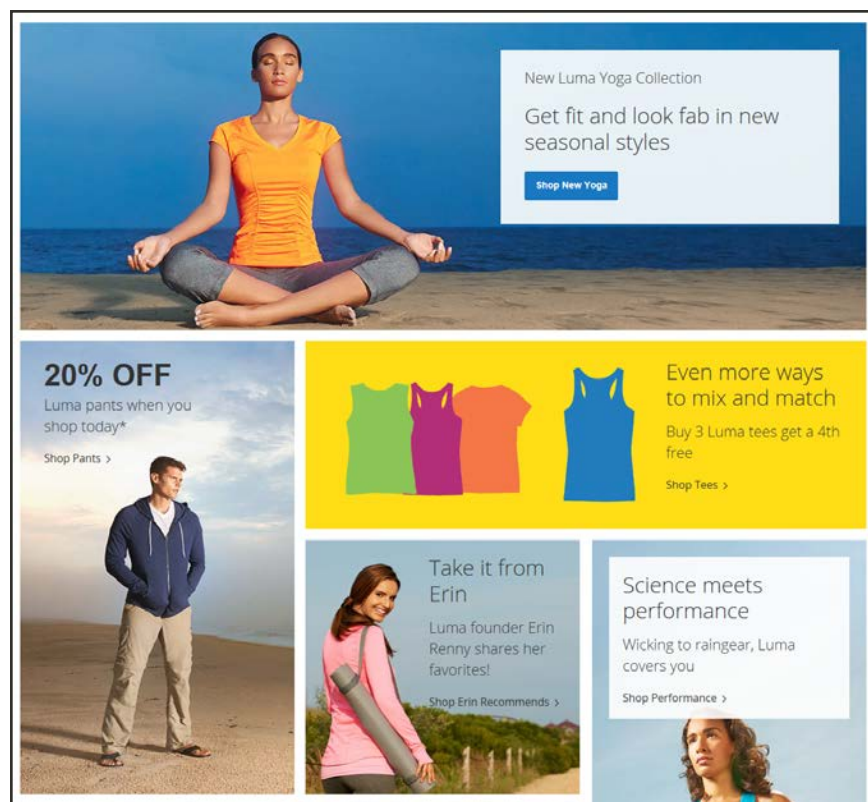


## CHAPTER 42:

# Content Blocks

A block is a modular unit of content that can be positioned most anywhere on the page. Content blocks are sometimes referred to as static blocks, or CMS blocks, and can be used to display fixed information such as text, images, and embedded video, as well as dynamic information from a widget or that originates in a database or other source. Most elements on the home page are blocks that can be easily managed.

You can create custom blocks of content without writing any code, and assign them to appear in a specific place in the page layout. Blocks can also be defined and positioned by making a **layout update** in XML code.



*Blocks on Home Page*

## Adding New Blocks

Custom blocks of content can be added to any page, group of pages, or even to another block. You can place code for a carousel image slider in a block, and then position the block on the home page.

The Blocks workspace uses the same **basic controls** as the Pages workspace to help you find blocks and perform routine maintenance operations.

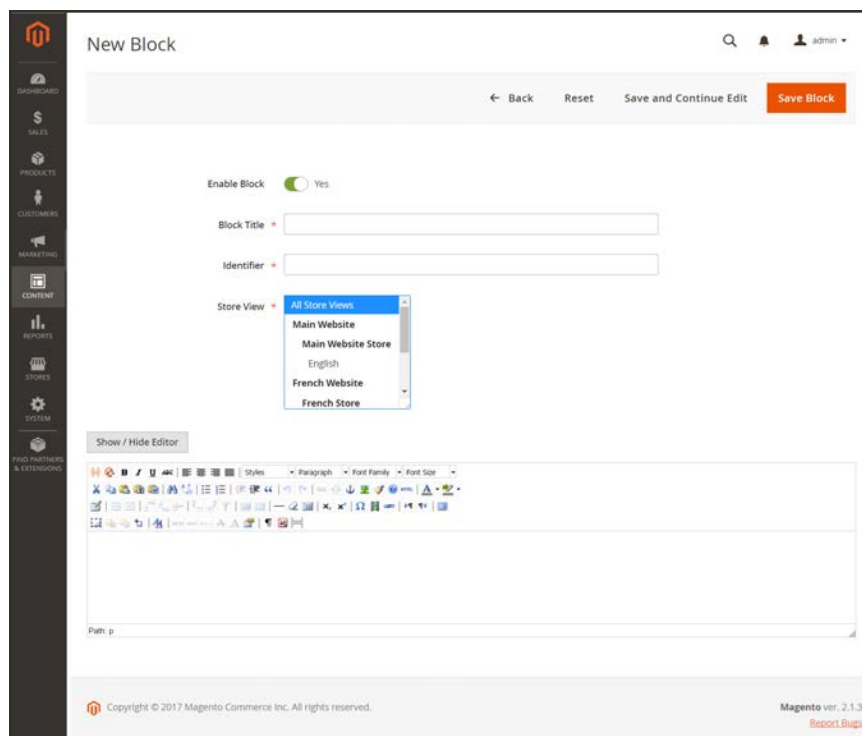
The screenshot displays the 'Blocks' workspace in Magento 2. The interface includes a sidebar with navigation icons for Dashboard, Sales, Products, Customers, Marketing, Content, Reports, Stores, and System. The main content area is titled 'Blocks' and features a search bar, a table of existing blocks, and an 'Add New Block' button. The table lists blocks with columns for ID, Title, Identifier, Store View, Status, Created, Modified, and Action. The footer shows the copyright notice for Magento Commerce Inc. and the version number 2.1.3.

ID	Title	Identifier	Store View	Status	Created	Modified	Action
1	Footer Links Block	footer_links_block	All Store Views	Enabled	Jan 10, 2017 9:15:33 AM	Jan 10, 2017 9:15:33 AM	Select
2	Contact us info	contact-us-info	All Store Views	Enabled	Jan 10, 2017 9:15:33 AM	Jan 10, 2017 9:15:33 AM	Select
3	Sale Left Menu Block	sale-left-menu-block	All Store Views	Enabled	Jan 10, 2017 9:15:33 AM	Jan 10, 2017 9:15:33 AM	Select
4	Gear Left Menu Block	gear-left-menu-block	All Store Views	Enabled	Jan 10, 2017 9:15:33 AM	Jan 10, 2017 9:15:33 AM	Select
5	Men Left Menu Block	men-left-menu-block	All Store Views	Enabled	Jan 10, 2017 9:15:33 AM	Jan 10, 2017 9:15:33 AM	Select
6	Women Left Menu Block	women-left-menu-block	All Store Views	Enabled	Jan 10, 2017 9:15:34 AM	Jan 10, 2017 9:15:34 AM	Select
7	New Left Menu Block	new-left-menu-block	All Store Views	Enabled	Jan 10, 2017 9:15:34 AM	Jan 10, 2017 9:15:34 AM	Select

*Blocks Workspace*

## To create a block:

1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Blocks**.
2. In the upper-right corner, tap **Add New Block**. Then, do the following:



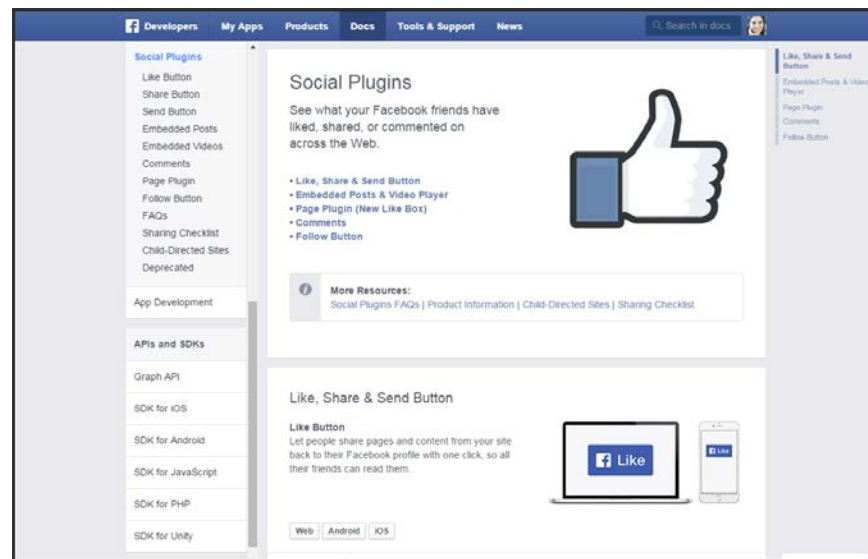
*New Block*

- a. By default the status of the new block is enabled. If you want to change the status, set **Enable Block** to “No.”
  - b. Assign a **Block Title** for internal reference.
  - c. Assign a unique **Identifier** for the block. Use all lowercase characters, with underscores instead of spaces.
  - d. Select each **Store View** where the block is to be available.
  - e. Complete the block **Content** as needed.
    - Use the **editor** to format text, create links and tables, images, video, and audio.
    - If you prefer to work with the HTML code, tap **Show / Hide Editor**.
3. When complete, tap **Save Block**.

The new block appears at the bottom of the list in the Blocks grid.

## Adding Social Plugins

Social networking sites have a numerous oplugins that can easily be added to your store. In addition, there are many extensions on Magento Connect that can be used to integrate your store with social media. The following example shows how to add a Facebook “Like” button to your store.



*Facebook Plugins*

### Step 1: Get the Button Code

1. On the Facebook website, go to the **button setup** page.
2. In the **URL to Like** field, enter the URL of the page in your store that you want people to Like. For example, you might enter the URL of your store’s home page. Then, do the following:
  - a. Choose the **Layout** for the button.
  - b. Enter the **Width** in pixels that is available on your site for the button and any associated text message.
  - c. Set **Action Type** to one of the following:
    - Like
    - Recommend
3. Tap **Get Code** to copy the generated code to the clipboard.

*Like Button Setup*

## Step 2: Create a Content Block

- Return to your store. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Blocks**.
- In the upper-right corner, click tap **Add New Block**. Then, do the following:
  - Enter a descriptive **Block Title** for internal reference. For example: Facebook Like Button.
  - Assign a unique **Identifier** to the block, using all lowercase characters, and underscores instead of spaces. For example: facebook\_like\_button.
  - If your Magento installation has multiple store views, choose each **Store View** where the block is to be available.
  - Paste the snippet of code that you copied from the Facebook site into the **Content** box.
  - If the block is not ready to “go live,” set **Enable Block** to “No.”
- When complete, tap **Save Block**.

## Step 3: Place the Block

- On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Widgets**.
- In the upper-right corner, tap **Add Widget**. Then, do the following:
  - In the Settings section, set **Type** to “CMS Static Block.” Then, tap **Continue**.
  - Verify that **Design Theme** is set to the current theme.
  - Tap **Continue**.
- In the Storefront Properties section, do the following:

- a. In the **Widget Title** field, enter a title for internal reference.
  - b. Set **Assign to Store Views** to “All Store Views,” or to the view where the app will be available. To select more than one, hold the Ctrl key down and select each option.
  - c. Enter a number in the **Sort Order** field to determine the order of the block if it assigned to appear in the same location on the page as other content elements. The top position is zero.
4. In the Layout Updates section, tap **Add Layout Update**. Then, set **Display On** to the category, product, or page where you want the block to appear.

For example, if you choose “All Pages,” and position the block in either the header or footer, the block will appear in the same place on every page of the store.

To place the block on a specific page, do the following:

- a. Set **Display On** to “Specified Page.” Then, select the **Page** where you want the block to appear.
  - b. Choose the **Block Reference** to identify the place on the page where the block is to be placed.
  - c. Accept the default setting for **Template**, which is set to “CMS Static Block Default Template.”
  - d. Tap **Save and Continue Edit**.
5. In the panel on the left, choose **Widget Options**.
6. Tap **Select Block...**. Then in the list, choose the block that you want to place.
7. When complete, tap **Save**.
8. When prompted, follow the instructions at the top of the workspace to update the index and page cache.

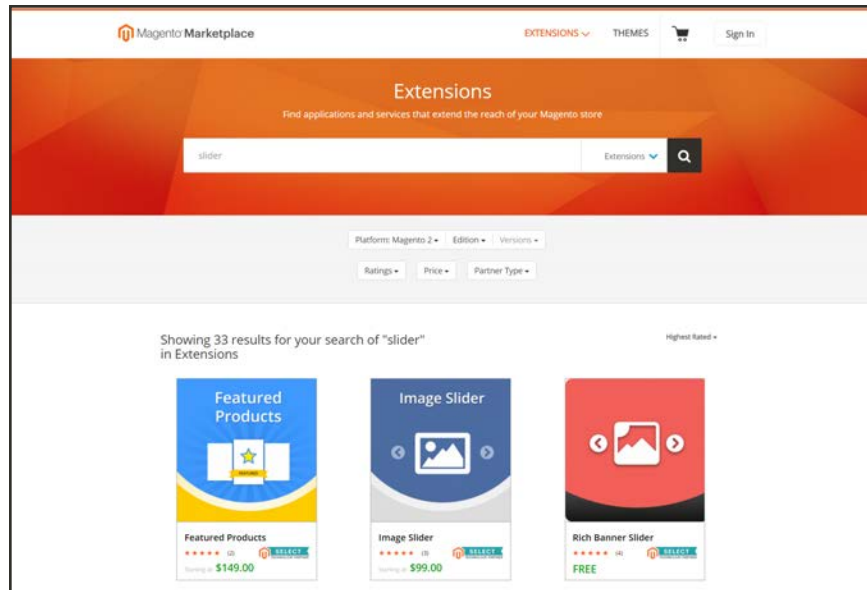
The widget now appears in the Widgets grid.

#### Step 4: Verify the Location in Your Store

Return to your storefront to verify that the block is in the correct location. To move the block, you can reopen the widget try a different page or block reference.

## Adding a Lightbox or Slider

There is a wide assortment of jQuery-based image lightboxes, sliders, and carousels available on [Magento Marketplace](#), and some are free. A recent search on the term “slider” returned thirty-three results.



### *Slider Extensions*

To add a lightbox or slider to your store, download the extension from Magento Marketplace, and follow the instructions from the developer.



## Positioning Blocks

The code that controls the page layout and placement of blocks is written in XML. [Widgets](#) make it easy to position a block at a specific place on the page, and even for a specific product or category without writing any code. You can choose each option from a list, rather than trying to remember all of the possible combinations.

The following list shows the locations by page type where blocks are typically placed. To learn more about how areas on the page are defined, see: [Standard Page Layouts](#).

### Category and CMS Pages

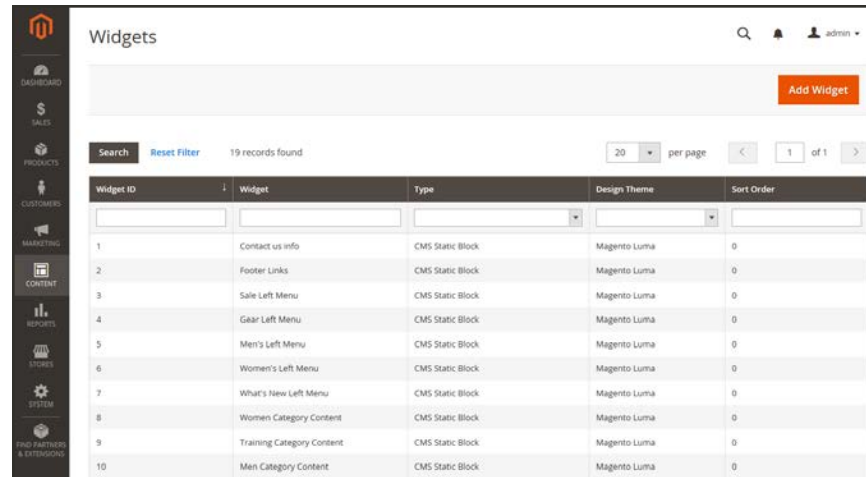
BLOCK REFERENCE	POSITION
Breadcrumbs	The navigation aid at the top of many pages that shows your current location as a link. Any additional content placed in the Breadcrumbs reference floats to the right of the breadcrumbs, if displayed.
Left Column	Content is added to the left column.
Main Content Area	Content is added to the main content area.
My Cart Extra Actions	Content appears below the Cart Subtotal in the My Cart popup located within the top link.
Navigation Bar	Content appears below the main navigation bar.
Page Bottom	Content appears at the bottom of the page.
Page Footer	Content appears above the footer of the page.
Page Header	Content appears below the header of the page.
Page Top	Content appears at the top of the page.
Right Column	Content appears in the right column.
Store Language	Content appears in the upper-left corner of the header.

## Product Page

BLOCK REFERENCE	POSITION
Alert URLs	Content appears below the title of the product on the product detail page.
Bottom Block Options Wrapper	If custom options are added, content appears below the Add to Cart button.
Breadcrumbs	Content appears to the right of breadcrumbs—the navigation aid that provides links as a path—that's showcased below the navigation bar.
Info Column Options Wrapper	If a custom options are added, content appears to the right. The same location applies to configurable options.
Left Column	Content appears below the left column blocks.
Main Content Area	Content appears below the main content area.
My Cart Extra Actions	Content appears below the Cart Subtotal in the My Cart popup located within the top link.
Navigation Bar	Content appears below the main navigation bar.
Page Bottom	Content appears at the bottom of the page.
Page Footer	Content appears above the footer of the page.
Page Header	Content appears below the header of the page.
Page Top	Content appears at the top of the page.
PayPal Express Checkout (Payflow Edition) Shortcut Wrapper	If the PayPal payment method is enabled, content appears below the PayPal buy button.
PayPal Express Checkout Shortcut Wrapper	If the PayPal payment method is enabled, content appears below the PayPal buy button.
Product Tags List	Content appears below the products tag bar.
Product View Extra Hint	Content appears below the main top price of the product.
Right Column	Content appears below the right column blocks.
Store Language	Content appears to the right of the language chooser.
Tags List Before	Content appears above the Add Your Tags field.

## Using a Widget

The CMS Static Block widget gives you the ability to place an existing **content block** most anywhere in your store.



Widget ID	Widget	Type	Design Theme	Sort Order
1	Contact us info	CMS Static Block	Magento Luma	0
2	Footer Links	CMS Static Block	Magento Luma	0
3	Sale Left Menu	CMS Static Block	Magento Luma	0
4	Gear Left Menu	CMS Static Block	Magento Luma	0
5	Men's Left Menu	CMS Static Block	Magento Luma	0
6	Women's Left Menu	CMS Static Block	Magento Luma	0
7	What's New Left Menu	CMS Static Block	Magento Luma	0
8	Women Category Content	CMS Static Block	Magento Luma	0
9	Training Category Content	CMS Static Block	Magento Luma	0
10	Main Category Content	CMS Static Block	Magento Luma	0

### Process Overview:

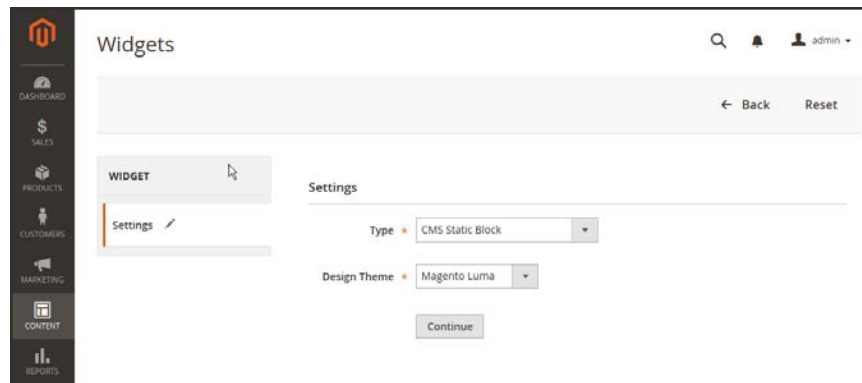
Step 1: **Choose the Type**

Step 2: **Complete the Layout Updates**

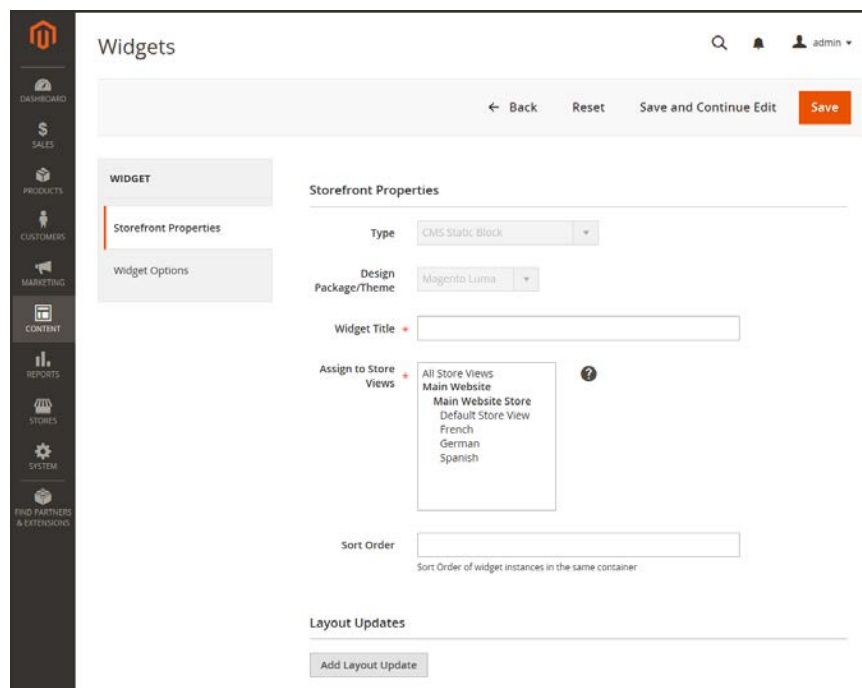
Step 3: **Place the Block**

### Step 1: Choose the Type

1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Widgets**.
2. In the upper-right corner, tap **Add Widget**. Then do the following:
  - a. In the Settings section, set **Type** to “CMS Static Block.” Then, tap **Continue**.
  - b. Verify that **Design Theme** is set to the current theme.
  - c. Tap **Continue**.

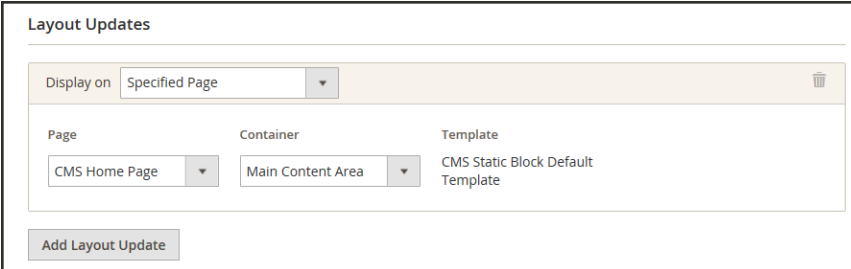
*Settings*

3. In the Storefront Properties section, do the following:
  - a. In the **Widget Title** field, enter a descriptive title for internal reference.
  - b. Set **Assign to Store Views** to “All Store Views,” or to the view where the app will be available. To select more than one, hold the Ctrl key down and select each option.
  - c. Enter a number in the **Sort Order** field to determine the order of the block if it assigned to appear in the same location on the page as other content elements. The top position is zero.

*Storefront Properties*

## Step 2: Complete the Layout Updates

1. In the Layout Updates section, tap **Add Layout Update**. Then, do the following:
2. Set **Display On** to the category, product, or page where you want the block to appear. To place the block on a specific page, do the following:
  - a. Choose the **Page** where you want the block to appear.
  - b. Choose the **Block Reference** that identifies the place on the page where the block is to be placed.
  - c. Accept the default setting for **Template**, which is set to "CMS Static Block Default Template."



The screenshot shows the 'Layout Updates' form. At the top, there's a 'Display on' dropdown menu set to 'Specified Page'. Below this, there are three columns: 'Page', 'Container', and 'Template'. The 'Page' column has a dropdown set to 'CMS Home Page'. The 'Container' column has a dropdown set to 'Main Content Area'. The 'Template' column has a text input set to 'CMS Static Block Default Template'. At the bottom left of the form is a button labeled 'Add Layout Update'.

*Layout Updates*

## Step 3: Place the Block

1. In the panel on the left, select **Widget Options**.
2. Tap **Select Block....** Then in the list, choose the block that you want to place.
3. When complete, tap **Save**.

The app now appears in the list.
4. When prompted, follow the instructions at the top of the workspace to update the index and page cache.
5. Return to your storefront to verify that the block appears in the correct location. To move the block, you can reopen the frontend app try a different page or block reference.

## Using a Layout Update

Blocks can be placed in the left or right sidebar of a specific page by making a **layout update** to the XML code. With a few simple changes to the code, you can position the block in either sidebar, and control its position in relation to other blocks.

The term **callout**<sup>1</sup> is sometimes used to refer to a block that is defined as a layout update with XML code. The term **sidebar**<sup>2</sup> refers to the left or right columns of the page layout. When entering layout update code, make sure to follow the syntax exactly as shown in the example.

To place a block in the sidebar, the page must have a two-or three-column layout. To learn more, see: [Page Layout](#).

### To place a block in the sidebar of a page:

1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Blocks**.
2. In the grid, find the block you want to place, and take note of its **Identifier**. Make sure that you have the correct spelling.
3. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Pages**.
4. Find the page where you want to place the block, and open the page in edit mode.
5. In the panel on the left, choose **Design**. Then, do the following:
  - a. In the **Layout Update XML** box, enter the code for the right or left sidebar.

#### Code for CMS Block in Sidebar

```
<reference name="right">
<block type="cms/block" name="right.permanent.callout">
<action method="setBlockId"><block_id>your-block-id</block_id></action>
</block>
</reference>
```

- b. Change the **reference name** to identify either the “right” or “left” column, according to the layout of the page.
  - c. Change the **block\_id** to the identifier of the block that is being placed.
6. When complete, tap **Save Page**.

---

<sup>1</sup>A term that is sometimes used to describe a block that is defined as a layout update using XML code.

<sup>2</sup>The right or left column of a two-column page layout.



## CHAPTER 43:

# Banners

Banners can be used to display an image or block of content, and appear for a specific period of time for a promotion. You can create banners that are visible only to certain customer segments, or whenever price rule conditions and coupons apply.

When designing banners for your store, take into consideration both the **page layout** and the theme you are using. Banners are often designed to appear on a specific page, and in a specific part of the page layout. Although the header and footer are a fixed width, the width of the content area and sidebars, can vary according to theme and page layout. When designing a banner with graphic images, it is important to understand the page layout, so you can put the available space to best use.

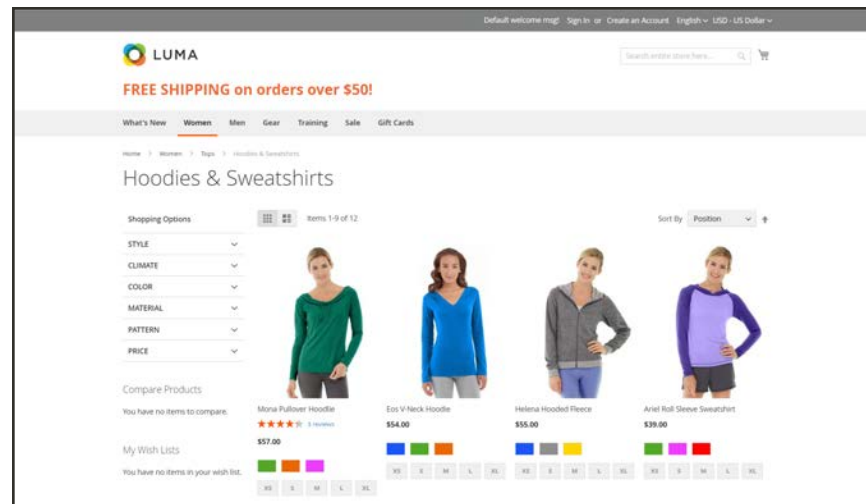


*Banner on Home Page*



## Creating a Banner

A banner can be as simple as a text message or image, or contain a combination of text, images, and code that is triggered by a promotion according to schedule. After the banner is created, use the Widget tool to place it in your store, or add it to a rotating sequence of banners.



*Free Shipping Banner in Header*

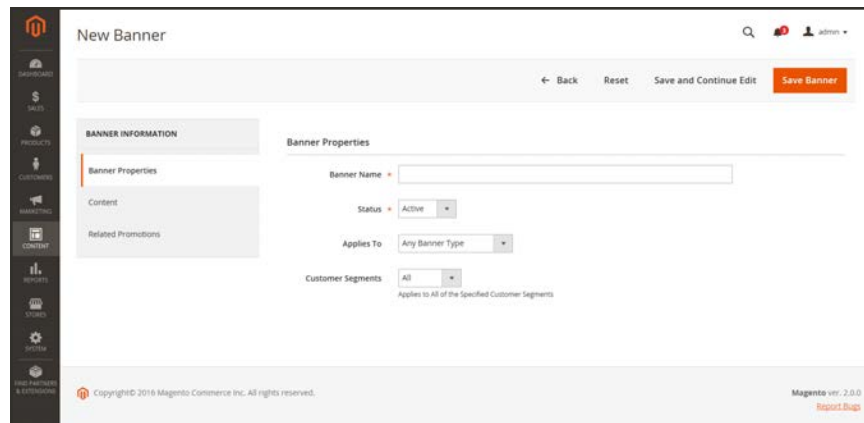
### Process Overview:

- Step 1: **Complete the Banner Properties**
- Step 2: **Complete the Banner Content**
- Step 3: **Choose a Related Promotion** (optional)
- Step 4: **Place the Banner**

### Step 1: Complete the Banner Properties

1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Banners**.
2. In the upper-right corner, tap **Add Banner**. Then, do the following:
  - a. Enter a **Banner Name** for internal reference.
  - b. Set **Status** to “Active.”
  - c. In the **Applies To** list, select one of the following:
    - Any Banner Type
    - Specified Banner Types

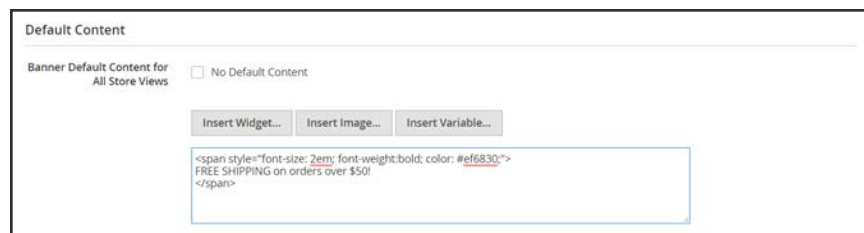
This setting determines the location on the page where the banner is placed. (To select more than one, hold the Ctrl key down and click each option.)

*Banner Properties*

- d. If the banner is to be used for a specific **customer segment**, set **Customer Segments** to “Specified.” Then, choose each customer segment that is associated with the banner.

## Step 2: Complete the Banner Content

1. In the panel on the left, choose **Content**.
2. If the banner is to use the same content for each store view, clear the **No Default Content** checkbox.

*Default Content*

3. In the text box, enter the HTML code that is needed to format the banner. Then, do any of the following:

### Insert Widget

1. Tap **Insert Widget**.
2. Choose the **Widget Type**.
3. Complete the **Widget Options**.
4. Tap **Insert Widget**.

## Insert Image

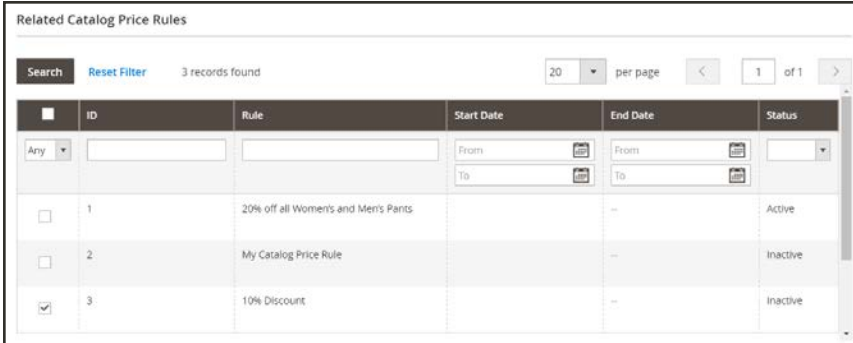
1. Tap **Insert Image**.
2. In the text box, position the cursor where you want the image tag to be inserted.
3. Do either of the following:
  - Tap **Browse** to find the image on your local computer.
  - Locate the image in the media folders on the left.
4. Tap **Insert File**.

## Insert Variable

1. To insert a variable, tap **Insert Variable**. Then, choose the variable that you want to insert.
2. Complete the HTML as needed. Depending on the content, the text box might contain a combination of HTML and markup tags.
4. To create content for a specific store view, do the following:
  - a. In the Store View Specific Content box after the name of the store view, clear the **Use Default** checkbox.
  - b. Follow the instructions in the previous step to enter the banner content for the store view.

## Step 3: Choose a Related Promotion (optional)

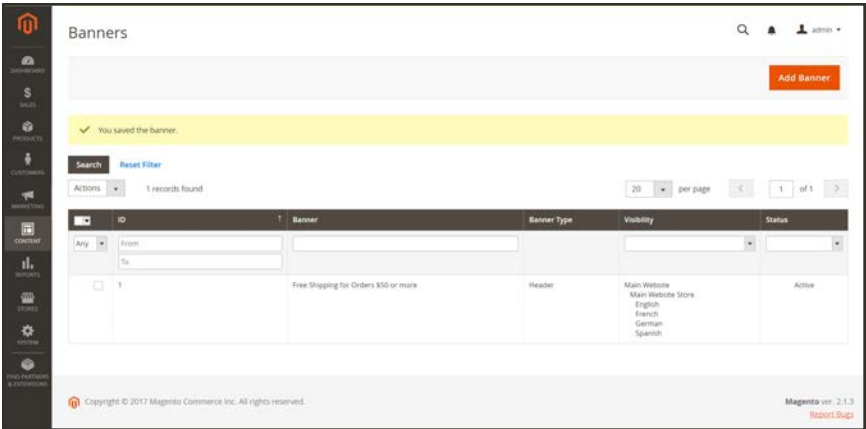
1. In the panel on the left, choose **Related Promotions**.
2. Scroll down through the list of available promotions for the type of price rule, and mark the checkbox of each promotion that can be used with the banner.



Search <a href="#">Reset Filter</a> 3 records found						
	ID	Rule	Start Date	End Date	Status	
Any			From  To	From  To		
<input type="checkbox"/>	1	20% off all Women's and Men's Pants		—	Active	
<input type="checkbox"/>	2	My Catalog Price Rule		—	Inactive	
<input checked="" type="checkbox"/>	3	10% Discount		—	Inactive	

*Related Promotions*

3. When complete, tap **Save Banner**.



Banner Saved

Step 4: Place the Banner

Use the Widget tool to create a **Banner Rotator** that places the banner at a specific location in the store.

Banner Type by Location

LOCATION	DESCRIPTION
Content Area	The width of the main content area varies, depending on the <b>column layout</b> of the page.
Footer	The bottom section of the page contains the footer links and copyright notice.
Header	The top section of the page contains your logo, account links, search box, and top navigation.
Left Column	The left column of a two- or three-column layout.
Right Column	The right column of a two-or three-column layout.

## Rotating Banners

A banner rotator can be used to display a single banner, or multiple banners in a specific sequence or random order. The next banner in the sequence appears whenever the page is refreshed.

The banner rotator is a frontend app that can be assigned to a specific page, product, or category, and placed most anywhere in your store. In addition, banner rotators can be associated with a specific cart or catalog price rule.

### Process Overview:

Step 1: [Create the Individual Banners](#)

Step 2: [Add a Widget](#)

Step 3: [Configure the Banner Rotator](#)

### Step 1: Create the Individual Banners

Create the individual **banners** that you want to include in the rotator.

### Step 2: Add a Widget

Follow the basic steps to add a **widget**.

- Set **Type** to "Banner Rotator."
- Under **Layout Updates**, choose the page and location where the banner rotator is to appear.

### Step 3: Configure the Banner Rotator

1. In the left panel, choose **Widget Options**. Then, do the following:
  - a. Set **Banners to Display** to "Specified Banners."
  - b. (Optional) To limit the banner to a certain area of the page, set **Restrict by Banner Types** to the place on the page where you want the banner to appear.
  - c. Set **Rotation Mode** to one of the following:
    - Do not rotate, display all at once
    - One at a time, Random
    - One at a time, Series
    - One at a time, Shuffle
2. To choose the banners to be included in the rotator, do the following:
  - a. In the Specify Banners section, use Search to find the banners you want to include. If necessary, tap **Reset Filter** to list all the available banners.
  - b. Mark the checkbox of each banner you want to include in the rotator.

- c. To set the sequence of each banner in relation to the others, enter a number in the **Position** column. To place a banner in the first position, enter the number 1.
3. When complete, tap **Save**.

### Banner Layout Update Options

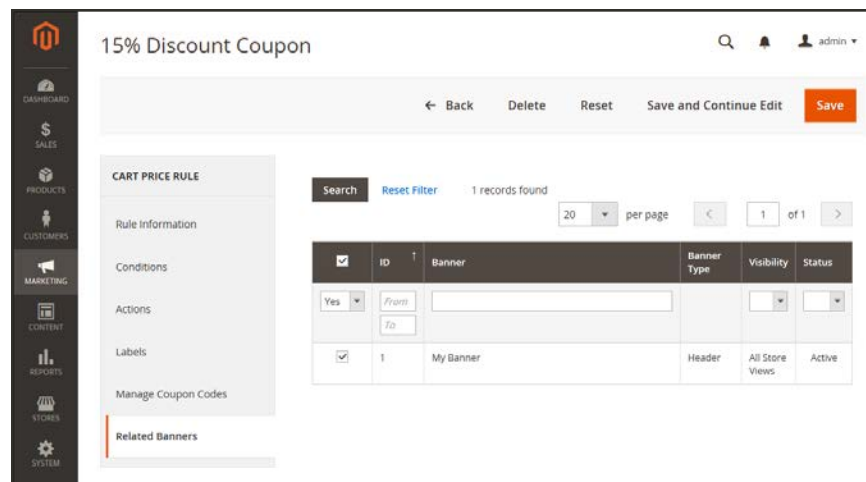
OPTION	DESCRIPTION												
Display On Categories	<p>Determines the categories where the banner rotator appears.</p> <table> <tr> <td>Anchor Categories</td><td>Appears only on anchored category pages listed in the layered navigation.</td></tr> <tr> <td>Non-Anchor Categories</td><td>Appears only on non-anchored category pages, which are category pages that are not shown in the layered navigation.</td></tr> <tr> <td>Products</td><td> <p>Displays the banner rotator for a specific product, or type of product. Options:</p> <ul style="list-style-type: none"> <li>All Product Type</li> <li>Simple Product</li> <li>Grouped Product</li> <li>Configurable Product</li> <li>Bundle Product</li> <li>Virtual Product</li> <li>Gift Card</li> </ul> </td></tr> </table>	Anchor Categories	Appears only on anchored category pages listed in the layered navigation.	Non-Anchor Categories	Appears only on non-anchored category pages, which are category pages that are not shown in the layered navigation.	Products	<p>Displays the banner rotator for a specific product, or type of product. Options:</p> <ul style="list-style-type: none"> <li>All Product Type</li> <li>Simple Product</li> <li>Grouped Product</li> <li>Configurable Product</li> <li>Bundle Product</li> <li>Virtual Product</li> <li>Gift Card</li> </ul>						
Anchor Categories	Appears only on anchored category pages listed in the layered navigation.												
Non-Anchor Categories	Appears only on non-anchored category pages, which are category pages that are not shown in the layered navigation.												
Products	<p>Displays the banner rotator for a specific product, or type of product. Options:</p> <ul style="list-style-type: none"> <li>All Product Type</li> <li>Simple Product</li> <li>Grouped Product</li> <li>Configurable Product</li> <li>Bundle Product</li> <li>Virtual Product</li> <li>Gift Card</li> </ul>												
Categories	Displays the banner rotator for only the categories selected.												
Block Reference	<p>Assigns the banner rotator to a specific location by reference. Options:</p> <table> <tr> <td>Breadcrumbs</td><td>Page Footer Before</td></tr> <tr> <td>Left Column</td><td>Page Footer Bottom</td></tr> <tr> <td>Main Content Area</td><td>Page Header</td></tr> <tr> <td>My Cart Extra Actions</td><td>Page Top</td></tr> <tr> <td>Navigation Bar</td><td>Right Column</td></tr> <tr> <td>Page Bottom</td><td>Store Language</td></tr> </table>	Breadcrumbs	Page Footer Before	Left Column	Page Footer Bottom	Main Content Area	Page Header	My Cart Extra Actions	Page Top	Navigation Bar	Right Column	Page Bottom	Store Language
Breadcrumbs	Page Footer Before												
Left Column	Page Footer Bottom												
Main Content Area	Page Header												
My Cart Extra Actions	Page Top												
Navigation Bar	Right Column												
Page Bottom	Store Language												
Template	<p>Options include:</p> <ul style="list-style-type: none"> <li>Banner Block Template</li> <li>Banner Inline Template</li> </ul>												

## Banner Frontend App Options

OPTION	DESCRIPTION	
Banners to Display	Options: Specified Banners Shopping Cart Promotions Related Catalog Promotions Related	
Restrict by Banner Types	Limits the banner to a certain section. Options: Content Area Footer Header Left Column Right Column	
Rotation Mode	Select the rotation mode for the banners. Options:	
	Do not rotate	Display one banner after the other, in a stack where all are visible.
	One at a time, Random	Displays the banners that you specify in a randomly generated order. Every time the page is refreshed, a different (and random) banner appears.
	One at the time, Series	Displays the banners that you specify by the order of their position every time the page is refreshed.
	One at the time, Shuffle	Displays one banner at a time in a shuffled position order. This option is similar to the One at a time, Random option, except that the same banner does not repeat back-to-back (unless you have only one banner).
Specify Banners	Select the banners to include from the list of available banners.	

## Using Banners in Price Rules

Any banners you create can be associated with both catalog and cart price rules for a promotion. To associate a banner with a price rule, you must first create both the banner and the price rule. Related banners can be associated with a price rule from the Banner tool, or from either the [Cart Price Rule](#) or [Catalog Price Rule](#) tool.



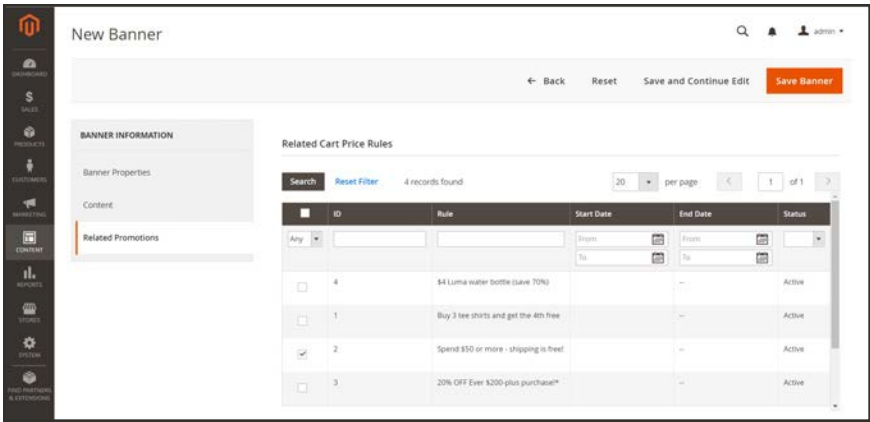
*Related Banners*

### To associate a banner with a price rule:

1. On the Admin sidebar, tap **Marketing**. Then, under **Promotions**, choose one of the following:
  - Catalog Price Rules
  - Cart Price Rules
2. In the grid, open the rule that is to have the banner. Then, do the following:



- a. Scroll down and expand  the **Related Banners** section to display the lists of available Cart and Catalog Price Rules.



*Related Promotions*

- b. If necessary, use the search filters to find the price rule(s) that you want. Then, mark the checkbox of each banner that you want to associate with the price rule.

If your banners don't appear in the grid, tap Reset Filter.

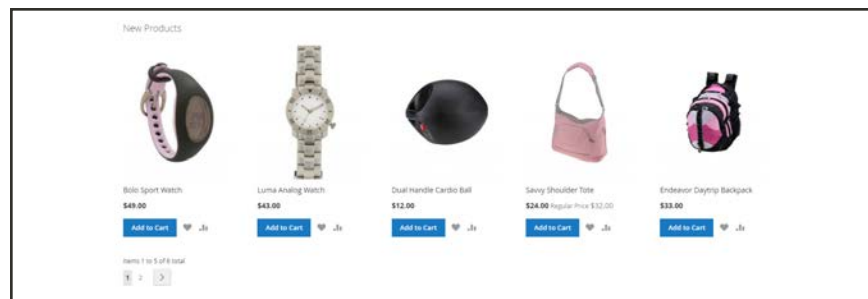
3. When complete, tap **Save Rule**.

## CHAPTER 44:

# Widgets

A widget is a snippet of code that makes it possible to display a wide range of content and place it at specific block references in your store. Many display real-time, dynamic data and create opportunities for your customers to interact with your store. The Widget tool makes it easy to place existing content such as blocks with images and text, and interactive elements most anywhere in your store.

You can use widgets to create landing pages for marketing campaigns, display promotional content at specific locations throughout the store. Widgets can also be used to add interactive elements and action blocks for external review systems, video chats, voting, and subscription forms, or to provide navigation elements for tag clouds and image sliders.



*New Product List Widget*

# Widget Types

## Widgets

TYPE	DESCRIPTION
Banner Rotator	Can be used to display a single banner, or an assortment of banners in a series, random order, or shuffled. The banner can be triggered by <a href="#">price rules</a> , and placed on a specific page and location, or configured to appear on all pages.
CMS Hierarchy Node Link	Displays a link to a specific node in the page hierarchy that can be incorporated into other content.
CMS Page Link	Displays a link to a specific CMS page. Allows you to specify custom text and title. When the link is complete, it can be used in content pages and blocks.
CMS Static Block	Displays a block of content at a specific location on a page.
Catalog Category Link	Displays either an inline or block-style link to a selected catalog category. When the link is complete, it can be used in content pages and blocks.
Catalog Events Carousel	Displays a list of upcoming catalog events and private sales.
Catalog New Products List	Displays a block of products which have been designated as new, for the duration of time specified in the product record.
Catalog Product Link	Displays either an inline or block-style link to a selected catalog product. When the link is complete, it can be used in content pages and blocks.
Catalog Products List	Displays a list of products from the catalog.
Gift Registry Search	Gives shoppers the ability to search for public gift registries by name or Registry ID.
Order by SKU	Order by SKU can be displayed in the store as a convenience for all shoppers, or made available only to those in specific customer groups. Shoppers can either enter the SKU and quantity information directly into the Order by SKU block, or upload a CSV file from their customer account.
Orders and Returns	Gives guests the ability to check the status of their orders and submit requests to return merchandise. The widget appears only for guests and customers who are not logged in to their accounts.
Recently Compared Products	Displays the block of recently compared products. You can specify the number of products included, and format them as a list or product grid.

**Widgets (cont.)**

TYPE	DESCRIPTION
Recently Viewed Products	Displays the block of recently viewed products. You can specify the number of products included, and format them as a list or product grid.
Wish List Search	Gives customer the ability to search for publicly available wish lists by the name or email address of the wish list owner. Store customers can find wish lists that belong to other customers, view them and order products from them, or add the products to their own wish lists.

# Creating a Widget

The process of creating a widget is nearly the same for each type. You can follow the first part of the instructions, and then complete the last part for the specific type of widget.

Widget ID	Widget	Type	Design Theme	Sort Order
1	Contact us info	CMS Static Block	Magento Luma	0
2	Footer Links	CMS Static Block	Magento Luma	0
3	Sale Left Menu	CMS Static Block	Magento Luma	0
4	Gear Left Menu	CMS Static Block	Magento Luma	0
5	Men's Left Menu	CMS Static Block	Magento Luma	0
6	Women's Left Menu	CMS Static Block	Magento Luma	0
7	What's New Left Menu	CMS Static Block	Magento Luma	0
8	Women Category Content	CMS Static Block	Magento Luma	0
9	Training Category Content	CMS Static Block	Magento Luma	0
10	Men Category Content	CMS Static Block	Magento Luma	0

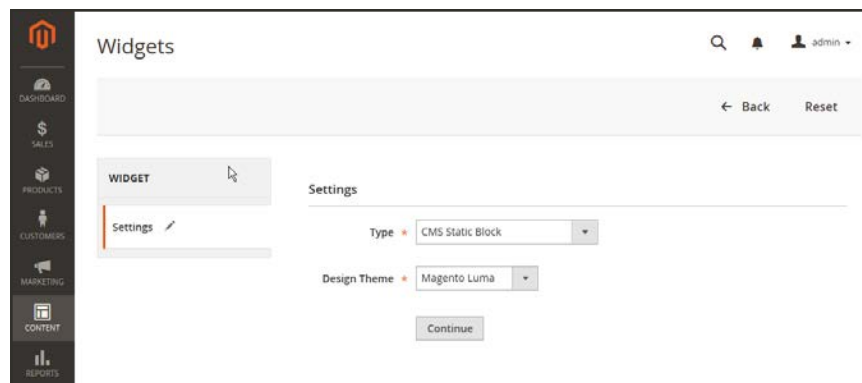
Widgets

**Process Overview:**

- Step 1: Choose the Type
- Step 2: Specify Where It Goes
- Step 3: Complete the Options
- Step 4: Check It Out!

## Step 1: Choose the Type

1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Widgets**.
2. Tap **Add Widget**. Then, do the following;
  - a. In the Settings section, set **Type** to the type of widget that you want to create. Then, tap **Continue**.
  - b. Verify that **Design Theme** is set to the current theme.
3. Tap **Continue**.



*Widget Settings*

4. Under **Storefront Properties**, do the following:
  - a. In the **Widget Title** field, enter a descriptive title for internal reference only.
  - b. Set **Assign to Store Views** to “All Store Views,” or to the view where the app will be available. To select more than one, hold the Ctrl key down and select each option.
  - c. Enter a number in the **Sort Order** field to determine the order of the block if it appears in the same location as other content elements. The top position is zero.

The screenshot shows the Magento 2 admin interface for configuring a widget. The left sidebar contains navigation links: DASHBOARD, SALES, PRODUCTS, CUSTOMERS, MARKETING, CONTENT, REPORTS, STORES, SYSTEM, and FIND PARTNERS & EXTENDING. The main content area is titled 'Widgets' and includes a search bar, a notification bell, and a user profile 'admin'. Below the title bar are buttons for 'Back', 'Reset', 'Save and Continue Edit', and a red 'Save' button. The 'WIDGET' section on the left has two sub-sections: 'Storefront Properties' (selected) and 'Widget Options'. The 'Storefront Properties' section contains the following fields:

- Type:** A dropdown menu set to 'CMS Static Block'.
- Design Package/Theme:** A dropdown menu set to 'Magento Luma'.
- Widget Title:** An empty text input field.
- Assign to Store Views:** A dropdown menu with a plus icon, showing a list of store views: 'All Store Views', 'Main Website', 'Main Website Store', 'Default Store View', 'French', 'German', and 'Spanish'. A help icon (?) is next to the list.
- Sort Order:** An empty text input field with a note below it: 'Sort Order of widget instances in the same container'.

At the bottom of the 'Storefront Properties' section is a 'Layout Updates' section with an 'Add Layout Update' button.

*Storefront Properties*

## Step 2: Specify Where It Goes

1. In the Layout Updates section, tap **Add Layout Update**.
2. Set **Display On** to the type of page where it is to appear.
3. In the **Block Reference** list, choose the area of the page layout where it is to be placed.

*Layout Updates*

4. If the widget is a link, set **Template** to one of the following:
 

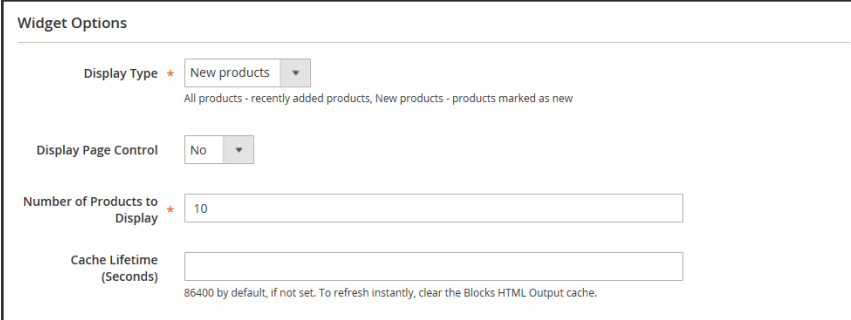
Block Template	Formats the content so it can be placed as standalone unit on the page.
Inline Template	Formats the content so it can be placed inside other content. For example, a link that goes inside a paragraph of text.

## Step 3: Complete the Options

The options for each widget type vary slightly, but the process is essentially the same. The following example displays the product list for a specific category, with pagination controls.

1. In the panel on the left, choose **Widget Options**.
2. Tap **Select Block**.
3. Enter a **Title** to appear above the list. For example, “Featured Products.”
4. For pagination controls, set **Display Page Control** to “Yes.” Then, do the following:
  - a. Enter the **Number of Products per Page**.
  - b. Enter the total **Number of Products to Display**.
  - c. Set **Condition** to the category of products to be featured. The process is the same as setting a condition for a **price rule**.





The screenshot shows a 'Widget Options' configuration panel. It contains four settings: 'Display Type' with a dropdown menu set to 'New products' and a descriptive text below; 'Display Page Control' with a dropdown menu set to 'No'; 'Number of Products to Display' with a text input field containing '10'; and 'Cache Lifetime (Seconds)' with a text input field and a descriptive text below.

Widget Options	
Display Type *	New products ▼ <small>All products - recently added products, New products - products marked as new</small>
Display Page Control	No ▼
Number of Products to Display *	10
Cache Lifetime (Seconds)	 <small>86400 by default, if not set. To refresh instantly, clear the Blocks HTML Output cache.</small>

*Widget Options*

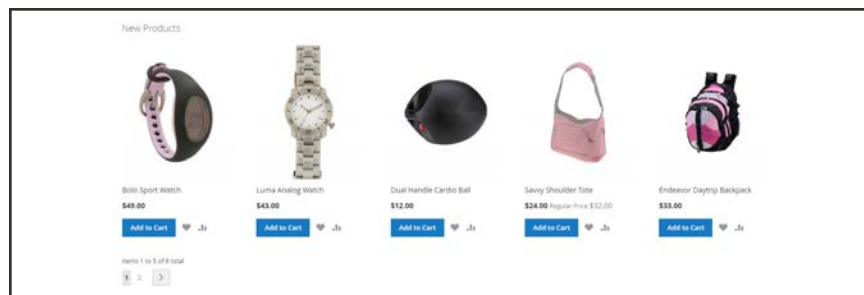
5. When complete, tap **Save**.
6. When prompted, follow the instructions at the top of the workspace to update the cache, as needed.

#### Step 4: Check It Out!

Return to your storefront to verify that the widget is working correctly. To move it to a different location, you can reopen the widget and try a different page or block reference.

## New Products List

The list of new products is an example of dynamic content, and consists of live data that is pulled from your product catalog. By default, the “New Products” list includes the first eight of the most recently added products. However, it can also be configured to include only products within a specified date range.



*New Products List on Home Page*

### Process Overview:

- Step 1: **Set the Date Range for Each Product**
- Step 2: **Create the Widget**
- Step 3: **Choose the Location**
- Step 4: **Configure the List**
- Step 5: **Preview Your Work**

### Step 1: Set the Date Range for Each Product

To make a product appear in the list by date range, the “New From” dates must be entered in the product. The product then appears in the New Products list during the date range specified.

1. On the Admin sidebar, tap **Products**. Then under **Inventory**, choose **Catalog**.
2. Find each product that you want to feature, and open in edit mode. Then, do the following:
  - a. In the **Set Product as New From** field, tap the calendar (📅). Then, choose the first date that you want the product to be featured.
  - b. In the **To** field, tap the calendar (📅). Then, choose the last date that you want the product to be featured.



*"Set Product As New " Date Range*

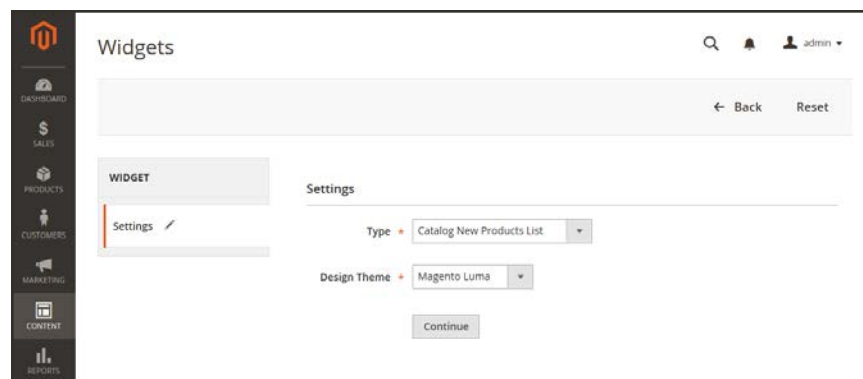
3. When complete, tap **Save**.
4. When you are prompted to reindex and refresh the page cache, click the links at the top of the workspace, and follow the instructions.

The list of products now appears on the Home Page for the specified date range.

## Step 2: Create the Widget

The code that determines the content of the New Products list and its placement in your store is generated by the Widget tool.

1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Widgets**.
2. In the upper-right corner, tap **Add Widget**.
3. In the Settings section, do the following:
  - a. Set **Type** to "Catalog New Products List."
  - b. Choose the **Design Theme** that is used by the store.
4. Tap **Continue**.



*Widget Type*

5. In the **Storefront Properties** section, complete the following fields:

Widget Title	Enter a descriptive title for your widget. This title is visible only from the Admin.
Assign to Store Views	Select the store views where the widget will be visible. You can select a specific store view, or "All Store Views."
Sort Order	(Optional) Enter a number to determine the order this items appears with others in the same part of the page. (0 = first, 1 = second, 3= third, and so on.)

The screenshot shows the 'Storefront Properties' configuration form. It includes the following fields and options:

- Type:** A dropdown menu set to 'Catalog New Products List'.
- Design Package/Theme:** A dropdown menu set to 'Magento Luma'.
- Widget Title:** A text input field containing 'New Products List'.
- Assign to Store Views:** A dropdown menu with a list of options: 'All Store Views', 'Main Website', 'Main Website Store', 'Default Store View', 'French', 'German', and 'Spanish'. A question mark icon is visible to the right of the dropdown.
- Sort Order:** An empty text input field. Below it, a small note reads: 'Sort Order of widget instances in the same container'.
- Layout Updates:** A section at the bottom with an 'Add Layout Update' button.

*Storefront Properties*

### Step 3: Choose the Location

1. In the Layout Updates section, tap **Add Layout Update**. Then, do the following:
  - a. Set **Display On** to "Specified Page."
  - b. Set **Page** to "CMS Home Page."
  - c. Set **Block Reference** to "Main Content Area."
  - d. Set **Template** to one of the following:
    - New Product List Template
    - New Products Grid Template

**Layout Updates**

Display on: Specified Page

Page: CMS Home Page    Container: Main Content Area    Template: New Products Grid Templ.

Add Layout Update

*Layout Updates*

2. Tap **Save and Continue Edit.**

For now, you can ignore the message to refresh the cache.

### Step 4: Configure the List

1. In the panel on the left, choose **Widget Options**. Then, do the following:
2. Set **Display Products** to one of the following:

All Products	Lists products in sequence, starting with those most recently added.
New Products	Lists only the products which are identified as “New.” A product is considered to be new during the date range that is specified in the “Set Product As New From/To” fields. The list will be empty if the date range expires without any new products defined.

3. Complete the remaining information as follows:
  - a. To provide navigation control for lists with multiple pages, set **Display Page Control** to “Yes.” Then, in the **Number of Products per Page** field, enter the number of products you want to appear on each page.
  - b. Set **Number of Products to Display** to the number of new products that you want to include in the list. The default setting is 10.
  - c. In the **Cache Lifetime (Seconds)** field, choose how often you want to refresh the list of new products. By default, the cache is set to 86400 seconds, or 24 hours.

**Widget Options**

**Display Type** \* New products ▼  
All products - recently added products, New products - products marked as new

**Display Page Control** No ▼

**Number of Products to Display** \* 10

**Cache Lifetime (Seconds)**  
86400 by default, if not set. To refresh instantly, clear the Blocks HTML Output cache.

*Widget Options*

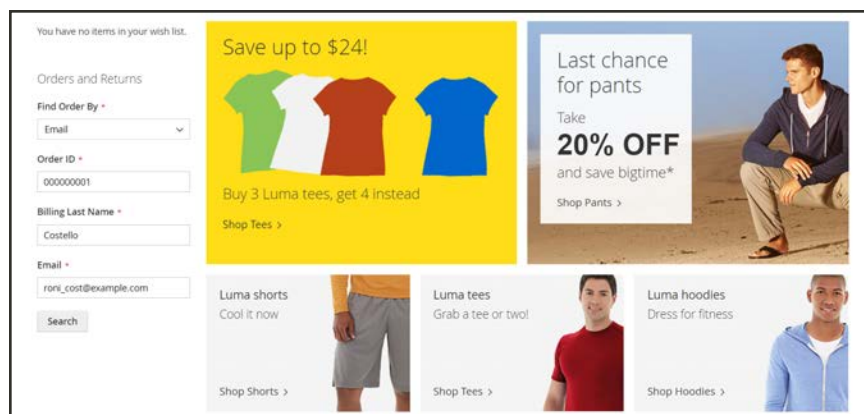
4. When complete, tap **Save**.
5. When prompted to refresh the cache, click the link in the message at the top of the workspace, and follow the instructions.

### Step 5: Preview Your Work

1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Pages**.
2. Find the page in the grid where the New Products list is to appear. Then, in the **Action** column, click the **Preview** link.

## Orders and Returns Widget

The Orders and Returns widget gives guests the ability to check the status of their orders, print invoices, and track shipments. When the widget is added to the storefront, it is visible only for guests and for customers who are not logged in to their accounts. Guests can find orders by providing the Order ID, Billing Last Name, and either the Email Address or ZIP Code.

*Orders and Returns Widget in Sidebar*

## To use the Orders and Returns Widget:

1. Choose one of the following fields to be used to find the order:
  - Email Address
  - ZIP Code
2. Enter the **Order ID** and **Billing Last Name**. Then, enter either the billing **Email Address** or **ZIP Code** that is associated with the order.
3. Tap **Search** to retrieve the order.

The screenshot shows the LUMA website's 'Order Information' page. At the top, the LUMA logo is on the left, and a search bar and shopping cart icon are on the right. Below the logo is a navigation menu with links: What's New, Women, Men, Gear, Training, and Sale. The main heading is 'Order # 000000001' with a 'PROCESSING' status. Below this is the date 'May 26, 2017' and links for 'Reorder' and 'Print Order'. A tabbed interface shows 'Order Information' selected, with 'Invoices' and 'Order Shipments' as options. A table lists the order items:

Product Name	SKU	Price	Qty	Subtotal
Iris Workout Top-XS-Red	WS03-XS-Red	\$0.00	Ordered: 1 Shipped: 1	\$0.00
Subtotal				\$29.00
Shipping & Handling				\$5.00
Tax				\$2.39
Grand Total				\$36.39

Below the table, there is an 'Order Information' section with four columns: Shipping Address, Shipping Method, Billing Address, and Payment Method. The Shipping Address and Billing Address both list 'Veronica Costello' at '6146 Honey Bluff Parkway, Calder, Michigan, 49628-7978, United States, T: (555) 229-3326'. The Shipping Method is 'Flat Rate - Fixed'. The Payment Method is 'Check / Money order'.

*Order Information*

## To set up the Orders and Returns widget:

1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Widgets**.
2. In the upper-right corner, tap **Add Widget**.
3. In the Settings section, do the following:
  - a. Set **Type** to "Orders and Returns".
  - b. Choose the **Design Theme** that is used by the store.
4. Tap **Continue**.

5. In the **Storefront Properties** section, complete the following fields:

Widget Title	Enter a descriptive title for your widget. This title is visible only from the Admin.
Assign to Store Views	Select the store views where the widget will be available. You can select a specific store view, or "All Store Views."
Sort Order	(Optional) Enter a number to determine the relative order of this item when it appears with other content in the same part of the page. (0 = first, 1 = second, 3= third, and so on.)

6. In the Layout Updates section, tap **Add Layout Update**. Then, do the following:
- Set **Display On** to the type of page where the widget is to appear.
  - Complete the rest of the layout update information to determine where the widget is to appear on the page.
7. When complete, tap **Save**. Then when prompted, refresh each invalid cache.



## Design & Theme

## Contents

Your store's theme is like a window dressing that can be changed for a season or promotion. In this section, you will learn about page layouts, how to make simple HTML changes, and apply a new theme to your store.

### Design Menu

#### Page Setup

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##### Header

##### Footer

### Page Layout

#### Standard Page Layouts

#### Storefront Examples

#### Layout Updates

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##### Layout Update Examples

##### Layout Update Syntax

##### Controlling Block Order

##### XML Load Syntax

### Themes

#### Using the Default Theme

#### Installing a New Theme

#### Theme Assets

#### Scheduling Design Changes

### Content Staging

#### Content Staging Workflow

#### Scheduling an Update

#### Staging Dashboard

##### Editing a Campaign

##### Adding an Item

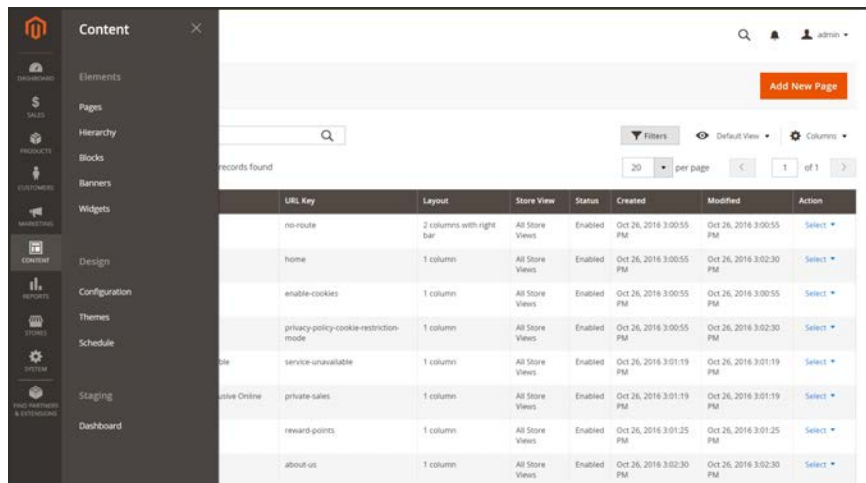
##### Previewing a Campaign

## CHAPTER 45:

# Design Menu

Magento provides a variety of easy-to-use design options that you can use to make simple changes to your store. In addition, you will find many professionally designed themes available on Magento Connect. Like the window dressing of your store, you can change the theme for the season or for a promotion.

More advanced users appreciate the flexibility of working with an object-oriented environment that assembles pages from separate components. After you understand the basics, you'll appreciate working in such a flexible and fluid environment. To learn more, see the [Frontend Developer Guide](#).

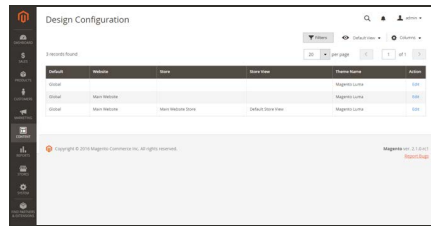


The screenshot shows the Magento Admin interface with the 'Design' menu selected. The left sidebar contains various navigation options, and the main content area displays a table of design elements.

URL Key	Layout	Store View	Status	Created	Modified	Action
no-route	2 columns with right bar	All Store Views	Enabled	Oct 26, 2016 3:00:55 PM	Oct 26, 2016 3:00:55 PM	<a href="#">Select</a>
home	1 column	All Store Views	Enabled	Oct 26, 2016 3:00:55 PM	Oct 26, 2016 3:02:30 PM	<a href="#">Select</a>
enable-cookies	1 column	All Store Views	Enabled	Oct 26, 2016 3:00:55 PM	Oct 26, 2016 3:00:55 PM	<a href="#">Select</a>
privacy-policy-cookie-restriction-mode	1 column	All Store Views	Enabled	Oct 26, 2016 3:00:55 PM	Oct 26, 2016 3:02:30 PM	<a href="#">Select</a>
service-unavailable	1 column	All Store Views	Enabled	Oct 26, 2016 3:01:19 PM	Oct 26, 2016 3:01:19 PM	<a href="#">Select</a>
private-sales	1 column	All Store Views	Enabled	Oct 26, 2016 3:01:19 PM	Oct 26, 2016 3:01:19 PM	<a href="#">Select</a>
reward-points	1 column	All Store Views	Enabled	Oct 26, 2016 3:01:25 PM	Oct 26, 2016 3:01:25 PM	<a href="#">Select</a>
about-us	1 column	All Store Views	Enabled	Oct 26, 2016 3:02:30 PM	Oct 26, 2016 3:02:30 PM	<a href="#">Select</a>

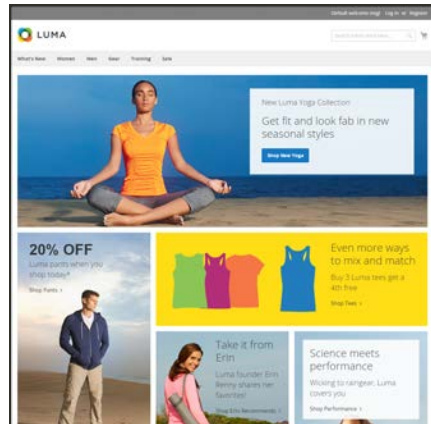
*Design Menu*

## Menu Options



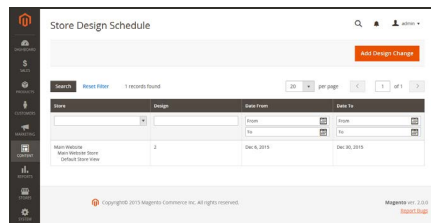
## Configuration

The Design configuration lets you easily maintain different settings for each website, store, and view in your Magento installation.



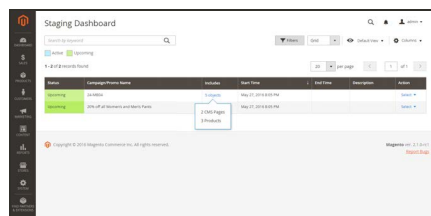
## Themes

The theme determines the visual presentation of your store, and consists of a collection of layout files, template files, translation files, and skins.



## Schedule

Themes can be activated for a period of time, according to a schedule. Use the schedule to plan theme changes in advance for a season or promotion.

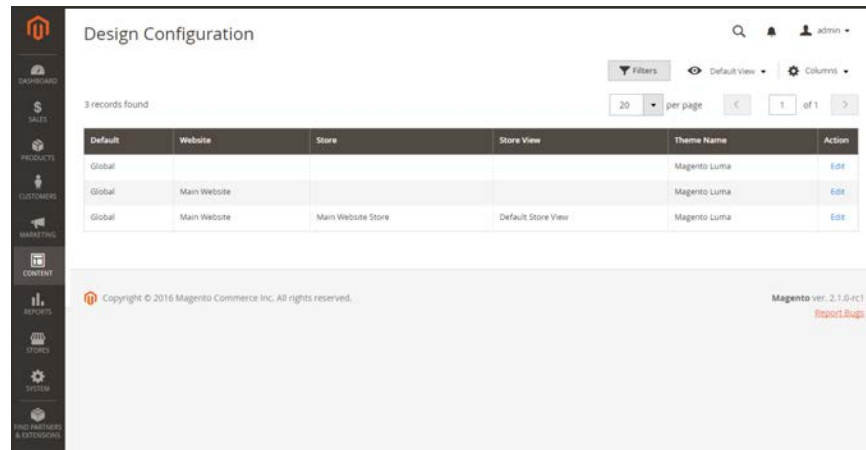


## Staging

Content Staging gives your business team the ability to easily create, preview, and schedule a wide range of content updates directly from the Admin of your store.

## Design Configuration

The Design Configuration makes it easy to edit design-related rules and configuration settings by displaying the settings on a single page.



*Design Configuration*

### To edit the design configuration:

1. On the Admin menu, tap **Content**. Then under **Design**, choose **Configuration**.
2. Find the store view that you want to configure. Then in the **Action** column, click **Edit**.

The page displays the current design settings for the store view.

3. To change the Default Theme, set **Applied Theme** to the theme that you want to apply to the view.

If no theme is specified, the system default theme is used. Some third-party extensions modify the system default theme.

4. If the theme is to be used for only a specific device, do the following:
  - a. Under Design Rules, tap **Add New User Agent Rule**.
  - b. In the **Search String** column, enter the browser ID for the specific device.
  - c. A search string can be either a normal expression or Perl Compatible Regular Expression (PCRE). To learn more, see: [User Agent](#). The following search string identifies Firefox:

```
/^mozilla/i
```

- d. In the **Theme Name** column, choose the theme that is to be used for the specified device.

*User-Agent Rules*

- e. Repeat the process to enter additional devices. Search strings are matched in the order they are entered.
5. Under Other Settings, expand each section and edit the settings as needed.

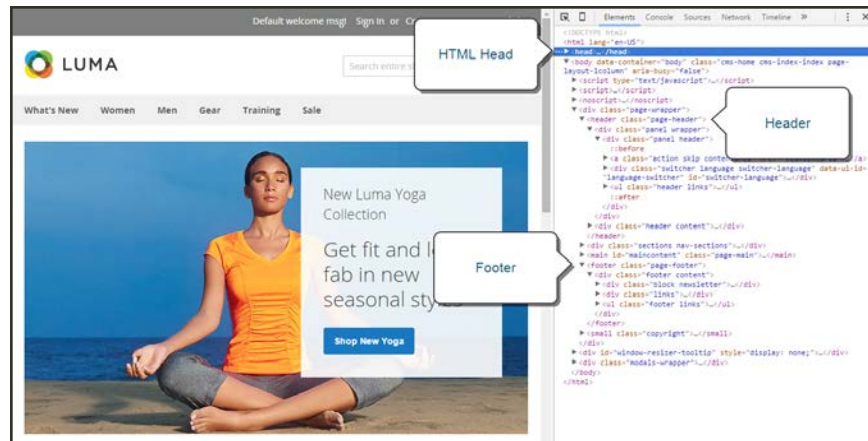
*Edit Design Configuration*

- HTML Head
  - Header
  - Footer
  - Pagination
  - Product Image Watermarks
  - Transactional Emails
6. When complete, tap **Save Configuration**.

## CHAPTER 46:

# Page Setup

The main sections of the page are controlled, in part, by a set of standard HTML tags. Some of these tags can be used to determine the selection of fonts, color, size, background colors, and images that are used in each section of the page. Other settings control page elements such as the logo in the header, and the copyright notice in the footer. The Page Setup sections correspond to the underlying structure of the HTML page, and many of the basic properties can be set from the Admin.




*HTML Page Sections*

# HTML Head

The settings in the HTML Head section correspond to the <head> tag of an HTML page, and can be configured for each store view. In addition to meta data for the page title, description, and keywords, the section includes a link to the favicon, and miscellaneous scripts. Instructions for search engine robots and the display of the store demo notice are also configured in this section.

## To configure the HTML Head:

- 1. On the Admin sidebar, tap **Content**. Then under **Design**, choose **Configuration**.
- 2. Find the store view that you want to configure. Then in the **Action** column, click **Edit**.
- 3. Under **Other Settings**, expand  the **HTML Head** section.
- 4. Update the fields as needed. (See the [Configuration Reference](#) for a description of each field,)
- 5. When complete, tap **Save Config**.

HTML Head

Favicon Icon

Upload

Allowed file types: ico, png, gif, jpg, jpeg, apng, svg. Not all browsers support all these formats!

Default Title

Magento Enterprise Edition

Title Prefix

Title Suffix

Default Description

Default Description

Default Keywords

Magento, Varien, E-commerce

Scripts and Style Sheets

<link rel="stylesheet" type="text/css" media="all" href="{(MEDIA\_URL)}styles.css" />

This will be included before head closing tag in page HTML.

Display Demo Store Notice

No

HTML Head




## Header

The Header section identifies the path to your store logo, and specifies the logo alt text and welcome message.

A screenshot of the 'Header' configuration section in the Magento Admin interface. The section is titled 'Header' in the top left corner. It contains several fields: 'Logo Image' with an 'Upload' button and a note 'Allowed file types: png, gif, jpg, jpeg, svg'; 'Logo Image Width' and 'Logo Image Height' as text input fields; 'Welcome Text' with a text input field containing 'Default welcome msg!'; and 'Logo Image Alt' with a text input field containing 'Magento Commerce'.

### Header

#### To configure the header:

1. On the Admin sidebar, tap **Content**. Then under **Design**, choose **Configuration**.
2. Find the store view that you want to configure. Then in the **Action** column, click **Edit**.
3. Under **Other Settings**, expand  the **Header** section.
4. Make any changes necessary to the **logo** and **welcome message** settings.
5. When complete, tap **Save Config.**

## Footer

The Footer configuration section is where you can update the **copyright notice** that appears at the bottom of the page, and enter miscellaneous scripts that must be positioned before the closing `<body>` tag..



Footer

Miscellaneous HTML

This will be displayed just before the body closing tag.

Copyright

Copyright © 2016 Magento. All rights reserved.

### *Footer*

#### To configure the footer:

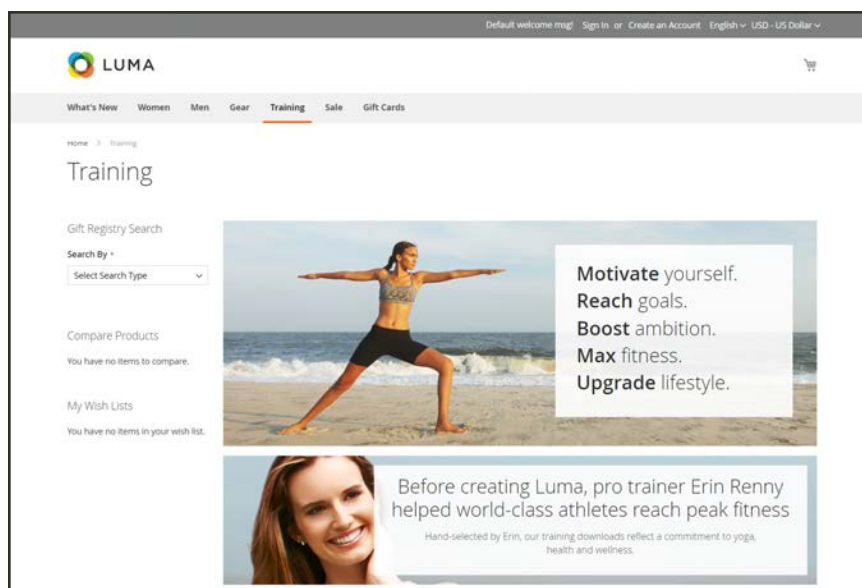
1. On the Admin sidebar, tap **Content**. Then under **Design**, choose **Configuration**.
2. Find the store view that you want to configure. Then in the **Action** column, click **Edit**.
3. Under **Other Settings**, expand ☑ the **Footer** section.
4. Make any changes necessary to the **Copyright** and **Miscellaneous HTML** settings.
5. When complete, tap **Save Config**.

## CHAPTER 47:

# Page Layout

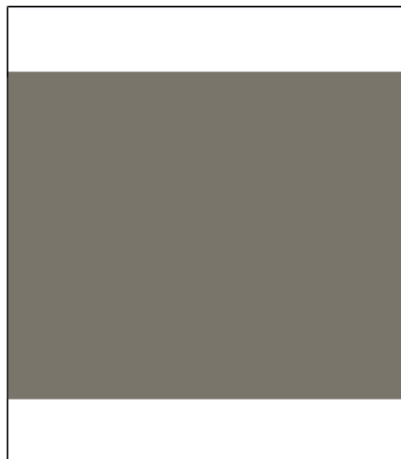
The layout of each page in your store consists of distinct sections, or containers, that define the header, footer, and content areas of the page. Depending on the layout, each page might have one, two, three columns, or more. You can think of the layout as the “floor plan” of the page.

Content blocks float to fill the available space, according to the section of the **page layout** where they are assigned to appear. You will discover that if you change the layout from a three-column to a two-column layout, the content of the main area expands to fill the available space, and any blocks that are associated with the unused side bar seem to disappear. However, if you restore the three-column layout, the blocks reappear. This fluid approach, or liquid layout, makes it possible to change the page layout without having to rework the content. If you are used to working with individual HTML pages, you will discover that this modular, “building block” approach requires a different way of thinking.



*Two Column Page Layout*

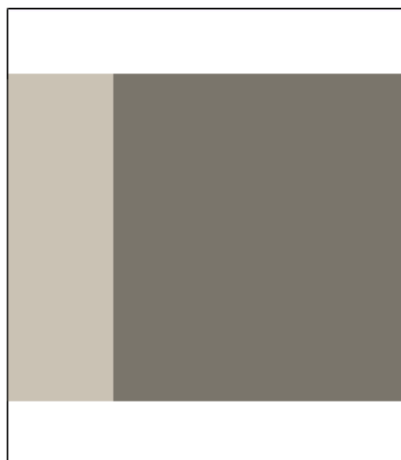
## Standard Page Layouts



### 1 Column

---

The “1 Column” layout can be used to create a dramatic home page with a large image or focal point. It’s also a good choice for a landing page, or any other page that has a combination of text, images, and video.



### 2 Columns with Left Bar

---

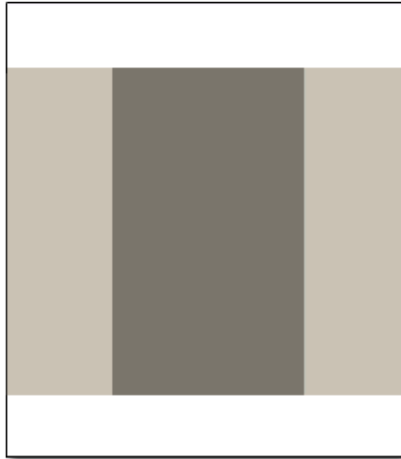
The “2 Columns with Left Bar” layout is often used for pages with navigation on the left, such as a catalog or search results pages with layered navigation. It is also an excellent choice for home pages that need additional navigation or blocks of supporting content on the left.



### 2 Columns with Right Bar

---

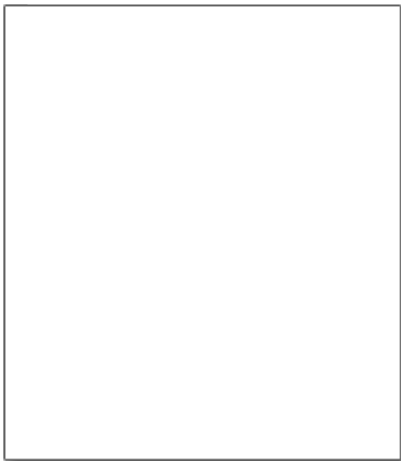
With a “2 Columns with Right Bar” layout, the main content area is large enough for an eye-catching image or banner. This layout is also often used for Product pages with blocks of supporting content on the right.



### 3 Columns

---

The “3 Column” layout has a center column that is wide enough for the main text of the page, with room on each side for additional navigation and blocks of supporting content.



### Empty

---

The “Empty” layout can be used to define custom page layouts. To learn more, see the [Magento Designer’s Guide](#).

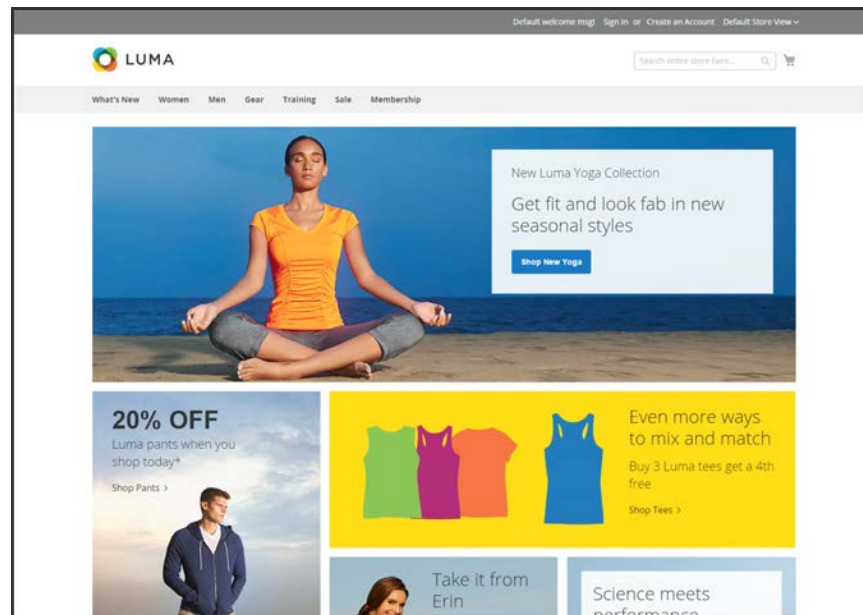
## Storefront Examples

The column dimensions are determined by style sheet of the theme. Some themes apply a fixed pixel width to the page layout, while others use percentages to make the page respond to the width of the window or device.

Most desktop themes have a fixed width for the main column, and all activity takes place within this enclosed area. Depending on your screen resolution, there is empty space on each side of the main column.

### 1 Column Layout

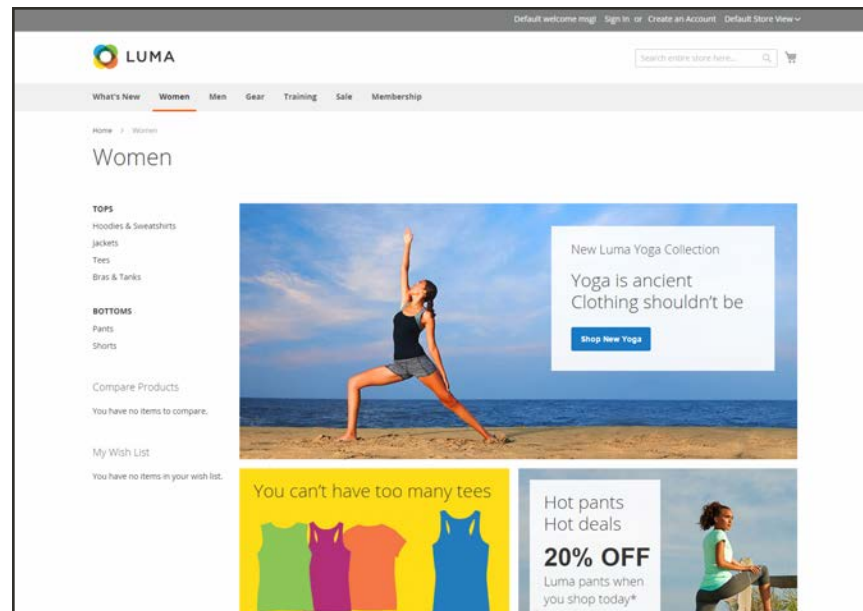
The content area of a “1 Column” layout spans the full-width of the main column. This layout is often used for a home page with a large banner or slider, or pages that require no navigation, such as a login page, splash page, video, or full-page advertisement.



*1 Column Layout*

## 2 Columns with Left Bar

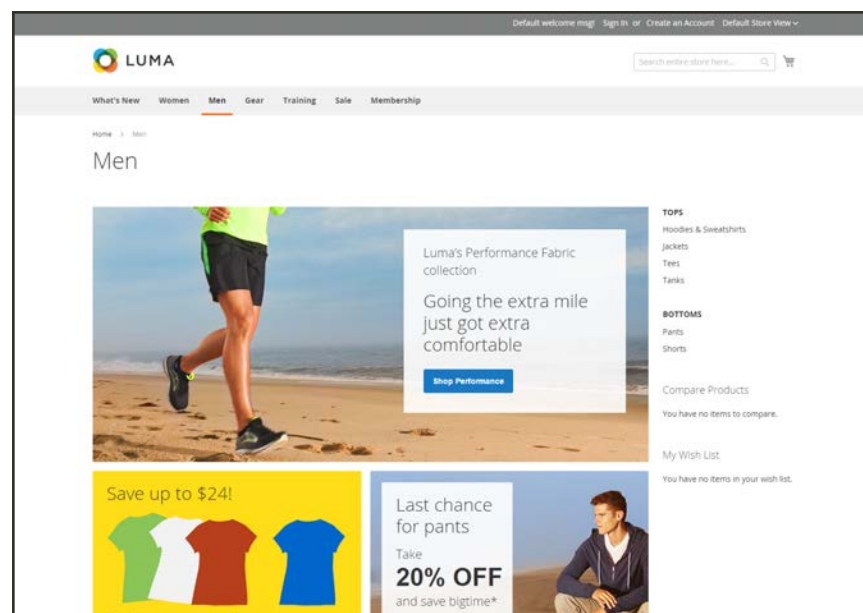
The content area of this layout is divided into two columns. The main content column floats to the right, and the side bar floats to the left.



*2 Columns Left Bar*

## 2 Columns with Right Bar

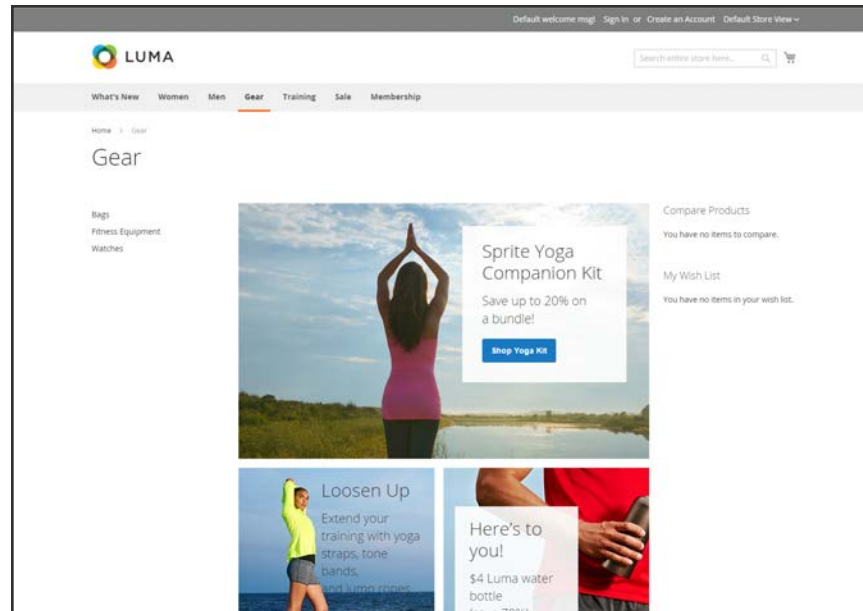
This layout is a mirror image of the other two-column layout. This time, the side bar floats to the right, and the main content column floats to the left.



*2 Columns Right Bar*

### 3 Columns

A 3-column layout has a main content area with two side columns. The left side bar and main content column are wrapped together, and float as a unit to the left. The other side bar floats to the right.



*3 Columns*



## Layout Updates

Before you begin working with custom layout updates, it is important to understand how the pages of your store are constructed, and the difference between the terms layout and layout update. The term **layout**<sup>1</sup> refers to the visual and structural composition of the page. However, the term **layout update**<sup>2</sup> refers to a specific set of XML instructions that determines how the page is constructed.

The XML layout of your Magento Commerce store is a hierarchical structure of blocks. Some elements appear on every page, and others appear only on specific pages. You can see how these structural blocks are referenced by examining the layout update code for your home page. To do so, simply open your home page in edit mode, and choose the Design tab to view the Page Layout section. Depending on the theme, it might contain instructions to remove blocks, unset blocks, and add blocks by referencing specific areas of the page layout.

In many cases, the same result can be achieved with the **Widget** tool. To place a block of content as a widget, you must identify the page, and location on the page where you want the block to appear. You can use the Widget tool to place a block on most any page in your store, including the home page and all content pages. However, to place a block in the sidebar of a specific page, you must make the change by entering code as a layout update.

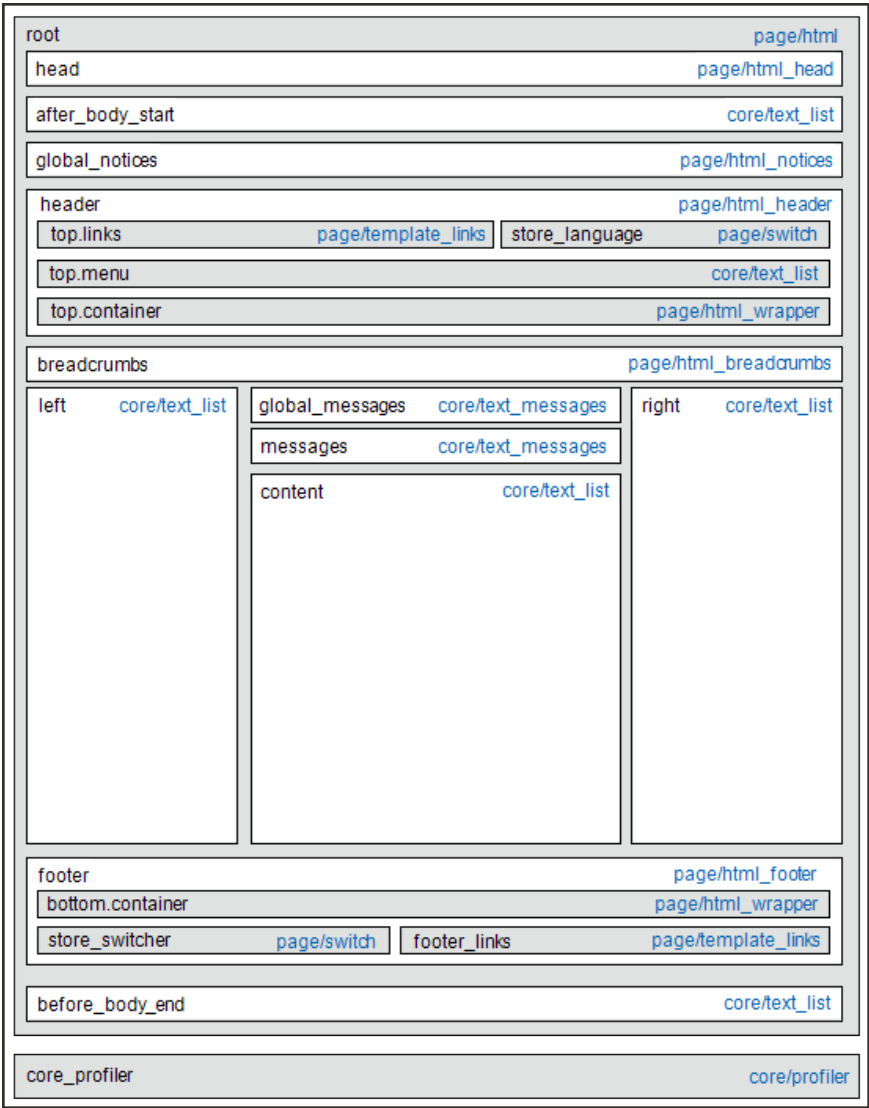
---

<sup>1</sup>The visual and structural composition of a page.

<sup>2</sup>A specific set of XML instructions that determines how the page is constructed.

# Standard Block Layout

In the following diagram, the block names that can be used to refer to a block in the layout are black, and the block types, or block class paths, are blue.



*Standard Block Layout*

## Block Descriptions

BLOCK TYPE	DESCRIPTION
<code>page/html</code>	There can be only one block of this type per page. The block name is "root," and, it is one of the few root blocks in the layout. You can also create your own block and name it "root," which is the standard name for blocks of this type.
<code>page/html_head</code>	There can be only one block of this type per page. The block name is "head," and it is a child of the root block. This block must not be removed from layout.
<code>page/html_notices</code>	There can be only one block of this type per page. The block name is "global_notices," and it is a child of the root block. If this block is removed from the layout, the global notices will not appear on the page.
<code>page/html_header</code>	There can be only one block of that type per page. The block name is "header," and it is a child of the root block. This block corresponds to the visual header at the top of the page, and contains several standard blocks. This block must not be removed.
<code>page/html_wrapper</code>	Although included in the default layout, this block is deprecated, and only is included to ensure backward compatibility. Do not use blocks of this type.
<code>page/html_breadcrumbs</code>	There can be only one block of this type per page. The name of this block is "breadcrumbs," and it is a child of the header block. This block displays breadcrumbs for the current page.
<code>page/html_footer</code>	There can be only one block of this type per page. The block name is "footer," and it is a child of the root block. The footer block corresponds to the visual footer at the bottom of the page, and contains several standard blocks. This block must not be removed.
<code>page/template_links</code>	There are two blocks of this type in the standard layout. The "top.links" block is a child of the header block, and corresponds to the top navigation menu. The "footer_links" block is a child of the footer block, and corresponds to the bottom navigation menu. It is possible to manipulate the template links, as shown in the examples.
<code>page/switch</code>	There are two blocks of this type in a standard layout. The "store_language" block is a child of the header block, and corresponds to the top language switcher. The "store_switcher" block is a child of the footer block, and corresponds to the bottom store switcher.
<code>core/messages</code>	There are two blocks of this type in a standard layout. The "global_messages" block displays global messages. The "messages" block is used to display all other messages. If you remove these blocks, the customer won't be able to see any messages.

**Block Descriptions (cont.)**

BLOCK TYPE	DESCRIPTION
core/text_list	This type of block is widely used throughout Magento, and is used as a placeholder for rendering children blocks.
core/profiler	There is only one instance of this type of block per page. It is used for the internal Magento profiler, and should not be used for any other purpose.

## Layout Update Examples

The following blocks types can be manipulated with custom layout instructions. Each action must be specified using the full syntax of the instruction. In the following examples, a simplified notation is used to refer to each action, which corresponds to the full syntax of the instruction.

### Full Syntax

```
?  
  
<!-- Action can be specified inside either a <block>  
or <reference> instruction. -->  
  
    <action method="someActionName">  
        <arg1>Value 1</arg1>  
        <arg2>Value 2</arg2>  
        <!--    -->  
        <argN>Value N</argN>  
    </action>  
  
<!--    -->
```

### Simplified Syntax

```
?  
  
someActionName($arg1, $arg2, ..., $argN)
```

## page/template\_links

### Syntax

ACTION	DESCRIPTION
<code>addLink(\$label, \$url, \$title, \$prepare</code>	
	Adds another link to the end of the list of existing links. Just specify the <code>\$label</code> (link caption), <code>\$url</code> (link URL) and <code>\$title</code> (link tooltip), and you'll see a new link in the corresponding place. The <code>\$prepare</code> parameter must be "true" if you want the URL to be prepared, or converted to the full URL from the shortened URL. For example, the new page becomes <code>BASE_URL/newpage</code> if prepared.
<code>removeLinkByUrl(\$url)</code>	Removes a link from the block by its URL. Note that the URL must be properly specified and exactly match corresponding URL of the link you want to remove.

## cms/block

### Syntax

ACTION	DESCRIPTION
<code>setBlockId(\$blockId)</code>	Specifies the ID of a CMS block, so its content can be fetched and displayed when the page is rendered.

```
?
<!--...-->

<reference name="content">
    <block type="cms/block" name="additional.info" as="additionalInfo">
        <action method="setBlockId"><id>additional_info</id></action>
    </block>
</reference>

<!--    -->
```

## core/text

A core/text block can be used to enter free form text directly into the template.

### Syntax

ACTION	DESCRIPTION
addText(\$textContent)	Specifies text to be rendered as the block's content. After the text is specified, the layout update instructions must continue to be a valid XML statement. If you use HTML tags as part of the text, it is recommended to use: <code>&lt;![CDATA[...]]&gt;</code>

```
?
<!--...-->

<reference name="content">
    <block type="core/text" name="test.block">
        <action method="addText">
            <txt><![CDATA[<h2>ATTENTION!</h2><p>Check your options
carefully before you submit.</p>]]></txt>
        </action>
    </block>
</reference>
<!-- -->
```

## page/html\_welcome

This block can be used to duplicate the “Welcome, <USERNAME>!” message that appears in the header block. When the user is not logged in, the welcome message specified in the configuration appears.

## Layout Update Syntax

Custom layout updates can be applied to product category pages, product pages, and content page to achieve a variety of results, such as:

<code>&lt;block&gt;</code>	Create new block.
<code>&lt;reference&gt;</code>	Update existing content.
<code>&lt;action&gt;</code>	Assign actions to blocks.
<code>&lt;remove&gt;</code>	Remove blocks.

Any change made to the layout is applied when the associated entity—which can be either a product, category, or CMS page—becomes active in the frontend of the store.

Custom layout update instructions consist of well-formed XML tags, without the `<?xml ...>` declaration and root tag. As with normal XML, every tag must either be empty or properly closed, as shown in the following examples:

```
<tag attribute="value" />
<tag attribute="value"> ... </tag>
```



**<block>**

Creates a new block within the current context. Layout block nesting defines the ordering of block initialization location of the blocks on the page.

**Syntax**

NAME	VALUE
type	<p><b>*</b> block class path</p> <p>An identifier of the block class path that corresponds to the class of the block. See the list of the available block types below.</p>
name	<p><b>*</b> block name identifier</p> <p>A name that can be used to address the block in which this attribute is assigned. If you create a new block with the name that is the same as one of the existing blocks, your newly created block substitutes the previously existing block. See the list of names of existing blocks below.</p>
before	<p>block name   '-'</p> <p>Is used to position the block before a block with the name specified in the value. If "-" value used the block is positioned before all other sibling blocks.</p>
after	<p>block name   '-'</p> <p>Is used to position the block after a block with the name specified in the value. If "-" value used the block is positioned after all other sibling blocks.</p>
template	<p>template filename</p> <p>A template filename used for the specific block type. As you have no way to see the list of template files, use whatever template value is demanded for every block type listed below.</p>
as	<p>block alias</p> <p>An alias name by which a template calls the block in which this attribute is assigned. Sometimes it's necessary to specify the alias for a specific block type.</p>

**<reference>**

Changes the context for all included instructions to a previously defined block. An empty <reference> tag if of no use, because it affects only the instructions which are children.

**Syntax**

NAME	VALUE
name	* block name A name of a block to reference.

**<action>**

Used to access block API, in other words, call block's public methods. It is used to set up the execution of a certain method of the block during the block generation. Action child tags are translated into block method arguments. The list of all available methods depends on the block implementation (e.g. public method of the block class).

**Syntax**

NAME	VALUE
method	* block method name A name of the public method of the block class this instruction is located in that is called during the block generation.

**<remove>**

Removes an existing block from the layout.

**Syntax**

NAME	VALUE
name	* block name The name of the block to be removed.

**<extend>**

This instruction performs final modifications to blocks which are already part of the layout. Every attribute in the <block> instruction—except for the block name—is subject for change. In addition, the special attribute parent can be used to change the parent of the block. Simply put the name of the new parent block into the <extend> instruction, and the parent of the block that is referenced will be changed in the layout.

**Syntax**

NAME	VALUE
name	<div><div>*</div>block name</div> <div>The name of any block to be extended.</div>
*	<div>any other</div> <div>Any other attribute specific for the &lt;block&gt; instruction.</div>
parent	<div>block name</div> <div>The name of the block that should become a new parent for the referenced block.</div>
	<div><div>*</div>Indicates a required value</div>

## Controlling Block Order

Sometimes more than one content element is assigned to the same structural block. For example, there might be several block that appear in a sidebar. You can control the order of blocks by including a “before” or “after” positioning property in the code. To place a block either before, or after a specific block, replace the hyphen with the block identifier, as shown in the following examples:

`before="- "`      Places the block at the top of the sidebar, before other blocks.

`after="- "`      Places the block at the bottom of the sidebar, after other blocks.

### Code to Position Content Blocks

```
<block type="cms/block" before="- " name="left.permanent.callout">
<block type="cms/block" before="some-other-block"
name="left.permanent.callout">
<block type="cms/block" after="- " name="left.permanent.callout">
<block type="cms/block" after="some-other-block"
name="left.permanent.callout">
```

## XML Load Sequence

For developers, it is important to understand that blocks and layout updates must be loaded in the correct order, in keeping with the rules of precedence and **load sequence**<sup>1</sup> which determine how the page is rendered. Magento supports the following page layout scenarios:

### Scenario 1: Default Layout

The default layout consists of the visual elements that are visible from every page of the store. Whether it is a menu item, or a shopping cart block, each item has a **handle**<sup>2</sup> in the default section of the layout definition.

### Scenario 2: Changes to Specific Pages

The second case allows you to create a different layout for a specific page. The XML layout for specific pages is constructed in the same sequence that Magento loads modules, and is determined by the system configuration.

In addition to the instructions in the layout update files which are specific to each module, you can make a custom layout update that applies to a special case in the backend, and is merged each time the special case occurs.

---

<sup>1</sup>The order in which scripts are loaded into memory. To work correctly, some scripts must be loaded before others.

<sup>2</sup>In programming, a name used to reference an object.



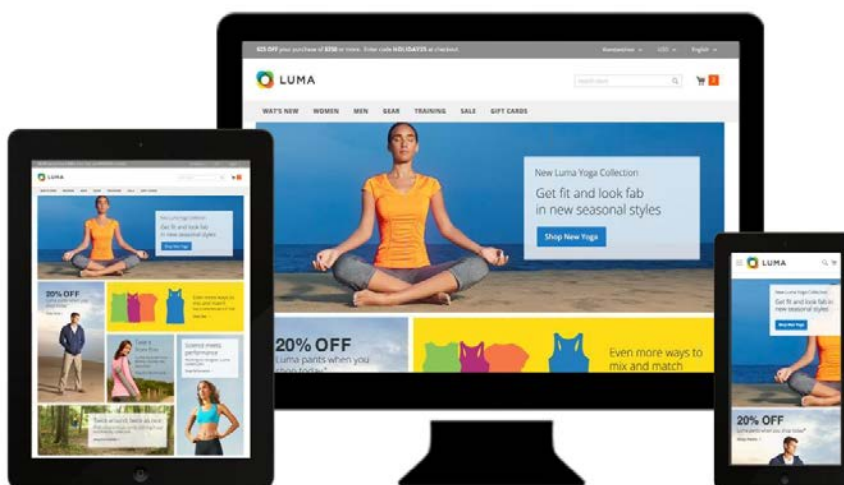


## CHAPTER 48:

# Themes

A theme is a collection of files that determines the visual presentation of your store. When you first install Magento Commerce, the design elements of the store are based on the “Default” Theme. In addition to the initial default theme that comes with your Magento installation, there is a wide variety of themes that are available “off the shelf” on Magento Connect.

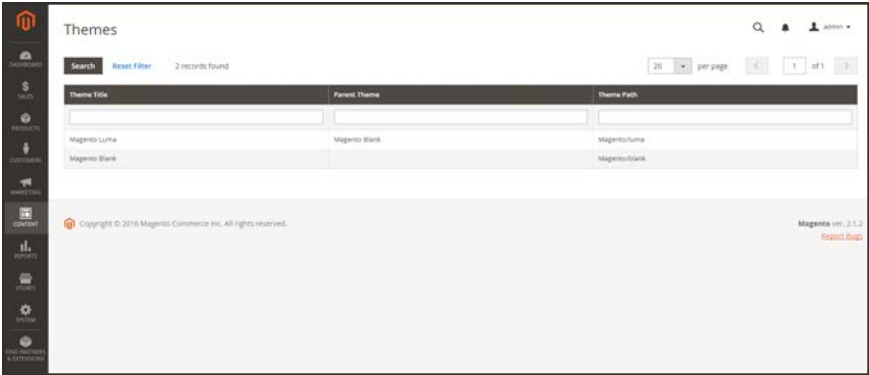
Magento themes include layout files, template files, translation files, and skins. A skin is a collection of supporting CSS, images, and JavaScript files that together, create the visual presentation and interactions that your customers experience when they visit your store. Themes and skins can be modified and customized by a developer or designer who has knowledge of Magento theme design and access to your server. To learn more, see the [Frontend Developer Guide](#).



*Luma Theme*

# Using the Default Theme

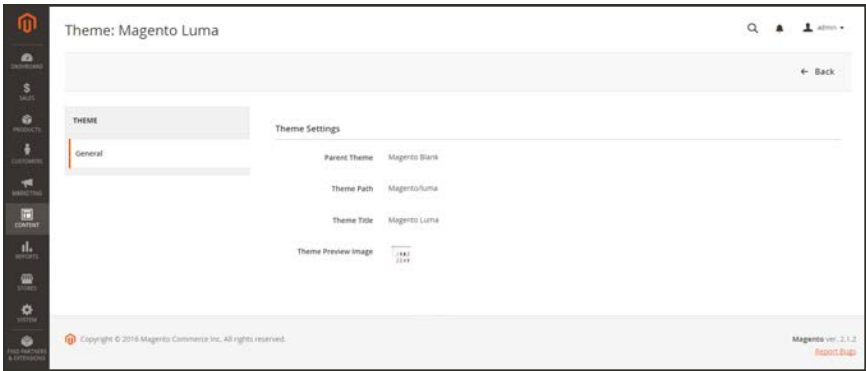
Magento’s default responsive theme renders the display of your storefront for different devices, and incorporates best practices for desktop, table, and mobile devices. Some themes are designed to be used only with specific devices. When Magento detects a specific browser ID, or user agent, it uses the theme that is configured to be used for the specific browser. The search string can also include Perl-Compatible Regular Expressions (PCRE). To learn more, see: [User Agent](#).



Themes

## To view the current theme settings:

1. On the Admin sidebar, tap **Content**. Then under **Design**, choose **Themes**.
2. In the list of installed themes, find the theme that you want to examine, and click the row to display the settings.
3. To view a sample page, tap the **Theme Preview Image**.



Preview Theme



### To apply a theme:

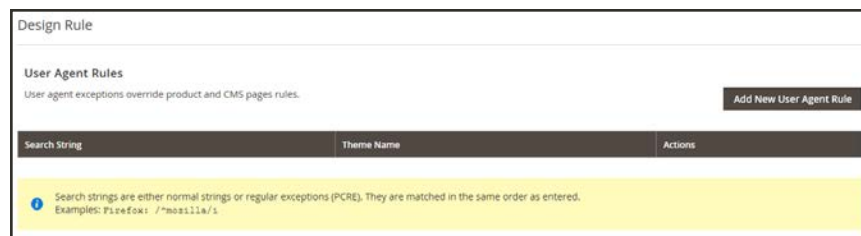
1. On the Admin sidebar, tap **Content**. Then under **Design**, choose **Configuration**.
2. Find the store view that you want to configure. Then in the **Action** column, click **Edit**.
3. Under **Default Theme**, set **Applied Theme** to the one that you want to use for the current view.



*Applied Theme*

### To add a user agent rule:

1. Under **Design Rule**, tap **Add New User Agent Rule**. Then, do the following:

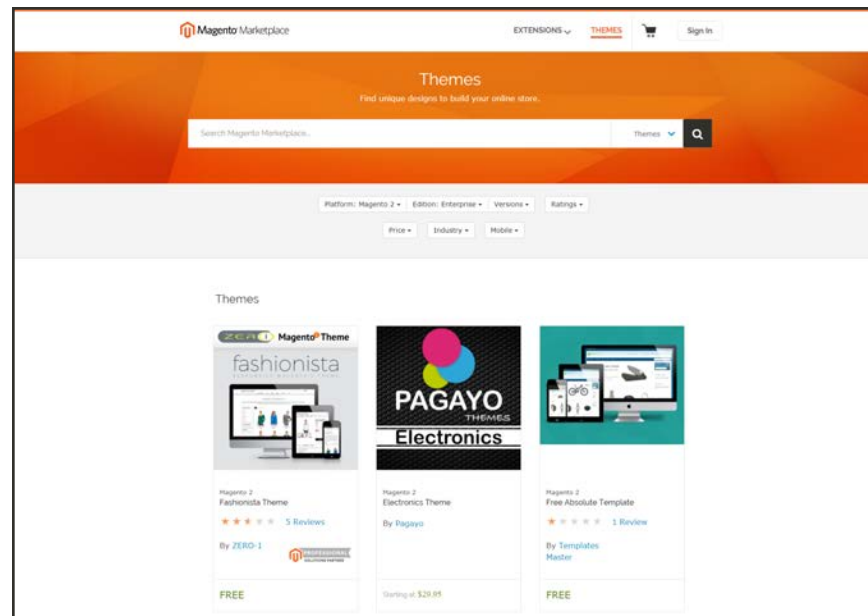


*Design Rule*

- a. In the **Search String** field, enter the browser ID for the specific device. For example:  
Search strings are matched in the order they are entered. For example, for Firefox enter:  
`/^mozilla/i`
  - b. Repeat the process to enter additional devices.
2. When complete, tap **Save Config**.

## Installing a New Theme

When you first install Magento, the design elements of the store are based on the “Default” theme. The Luma theme is also available if you installed the sample data. You can modify a theme, add themes created by others, or create new ones. [Magento Marketplace](#) contains a growing selection of themes that you can install to change the appearance of your store. To learn how to create or modify a theme, see the [Frontend Developer Guide](#).



*Magento Marketplace*

### To install a new theme:

1. Before you begin, make sure that you have a valid set of [Magento 2 Access Keys](#).
2. Follow the steps outlined in the [Marketplace Quick Tour](#), to:
  - Find a Theme
  - Evaluate the Product
  - Make a Purchase
  - Download the Software
  - Install the Theme
3. To apply the theme to your store, see: [Using the Default Theme](#),

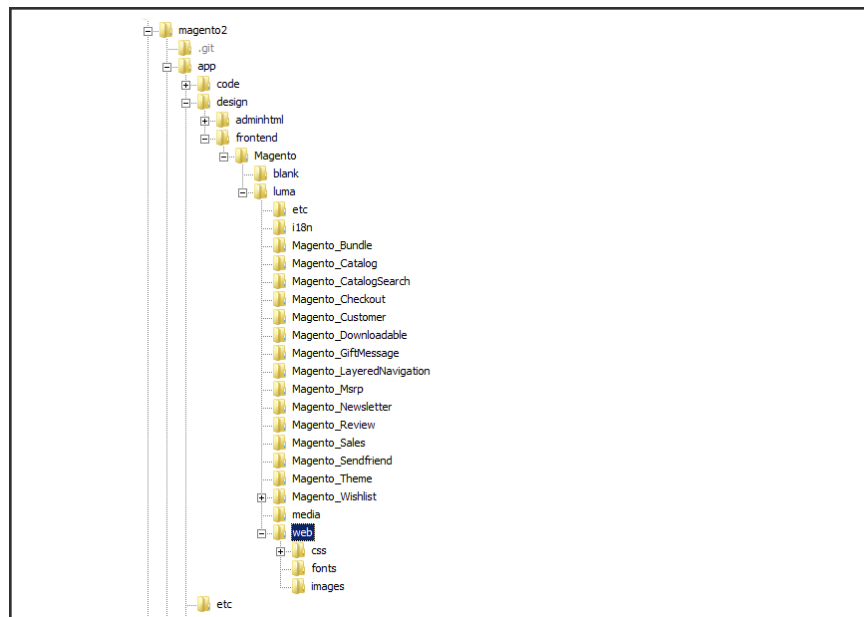
## Theme Assets

The term **static files**<sup>1</sup> refers to the collection of assets, such as CSS, fonts, images, and JavaScript, that is used by a theme. The location of static files is specified in the **Base URL** configuration.

A digital signature can be added to the URL of each static file to make it possible for browsers to detect when a newer version is available. The newer version of the file is used if the signature differs from what is stored in the browser's cache.

For a standard installation, the assets associated with a theme are organized in the `web` folder at the following location below the Magento root.

```
[magento_root]/app/design/frontend/Magento/[theme_name]/web
```

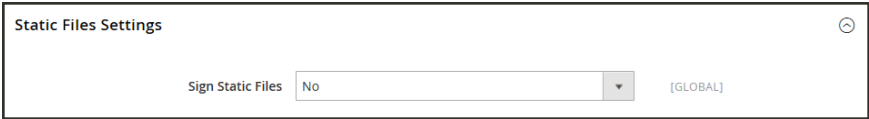


*Theme Assets*

<sup>1</sup>The collection of assets, such as CSS, fonts, images, and JavaScript that is used by a theme.

To sign static files:

- 1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
- 2. In the panel on the left under **Advanced**, choose **Developer**.
- 3. Expand ☑ the **Static Files Settings** section.



Static Files Settings

- 4. Set **Sign Static Files** to "Yes."
- 5. When complete, tap **Save Config**.

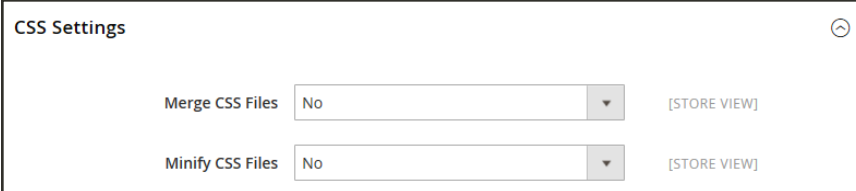
FILE TYPE	DESCRIPTION
CSS	Directory that contains the CSS files that control the visual styling that is associated with the skin. Example location on server: [magento]/app/design/frontend/Magento/[theme]/web/css
Fonts	Directory that contains the fonts that are available to be used by the theme. Location on server: [magento]/app/design/frontend/Magento/[theme]/web/fonts
Images	Directory that contains all images used by the theme, including buttons, background textures, and so on. Example location on server: [magento]/app/design/frontend/Magento/[theme]/web/images
JS	Directory that contains theme-specific JavaScript routines and callable functions. Example location on server: [magento]/app/design/frontend/Magento/[theme]/web/js

## Merging CSS Files

As part of an effort to optimize your site and reduce page load time, you can reduce the number of separate CSS files by merging them into a single condensed file. If you open a merged CSS file, you'll find one continuous stream of text, with line breaks removed. Because you can't edit the merged file, it's best to wait until you are out of the development mode, and no longer making frequent changes to the CSS.

### To merge CSS files:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **Developer**.
3. Expand ☯ the **CSS Settings** section.



The screenshot shows the 'CSS Settings' panel. It has a title 'CSS Settings' at the top left and a close icon at the top right. Below the title, there are two settings. The first is 'Merge CSS Files' with a dropdown menu showing 'No' and a '[STORE VIEW]' link. The second is 'Minify CSS Files' with a dropdown menu showing 'No' and a '[STORE VIEW]' link.

### *CSS Settings*

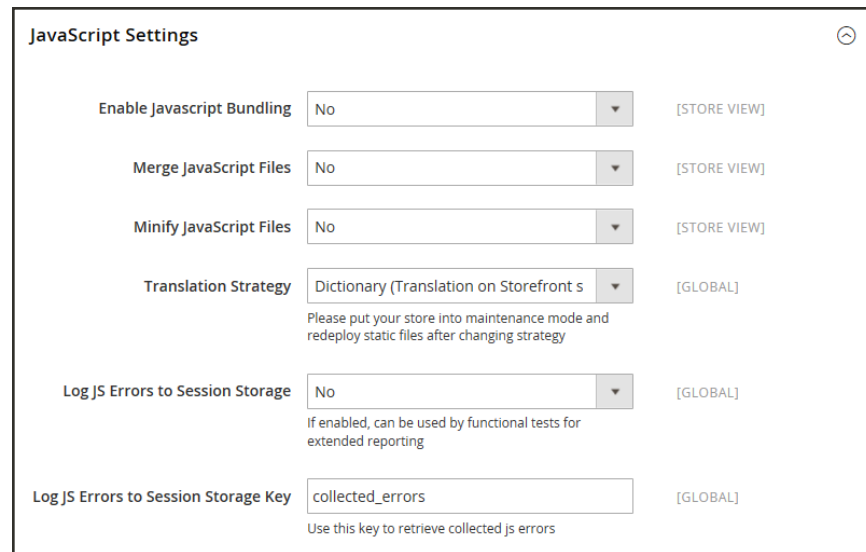
4. Set **Merge CSS Files** to “Yes.”
5. When complete, tap **Save Config**.

## Merging JavaScript Files

Multiple JavaScript files can be merged into a single, condensed file to reduce page load time. If you open a merged JavaScript file, you'll find one continuous stream of text, with line breaks removed. If you are finished with the development process, and the code contains no errors, you might consider merging the files.

### To merge JavaScript files:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **Developer**.
3. Expand ☑ the **JavaScript Settings** section.



The screenshot shows the 'JavaScript Settings' panel in the Magento Admin interface. It contains several configuration options, each with a dropdown menu and a scope indicator. The options are: 'Enable Javascript Bundling' (set to 'No', [STORE VIEW]), 'Merge JavaScript Files' (set to 'No', [STORE VIEW]), 'Minify JavaScript Files' (set to 'No', [STORE VIEW]), 'Translation Strategy' (set to 'Dictionary (Translation on Storefront s)', [GLOBAL], with a note: 'Please put your store into maintenance mode and redeploy static files after changing strategy'), 'Log JS Errors to Session Storage' (set to 'No', [GLOBAL], with a note: 'If enabled, can be used by functional tests for extended reporting'), and 'Log JS Errors to Session Storage Key' (set to 'collected\_errors', [GLOBAL], with a note: 'Use this key to retrieve collected js errors').

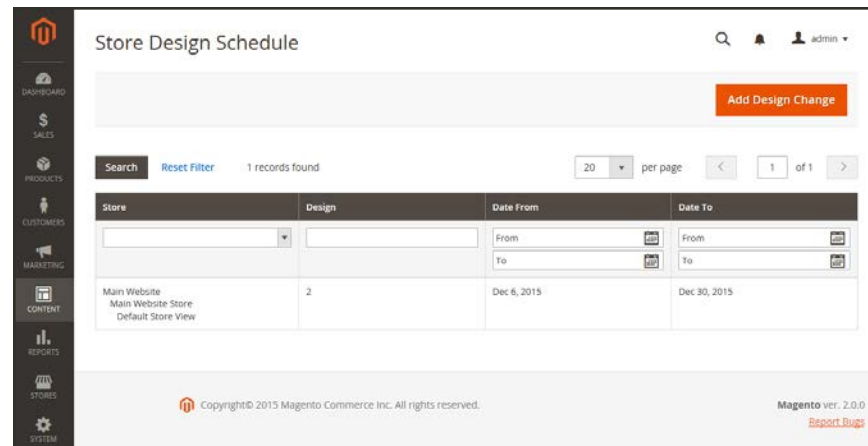
Setting	Value	Scope
Enable Javascript Bundling	No	[STORE VIEW]
Merge JavaScript Files	No	[STORE VIEW]
Minify JavaScript Files	No	[STORE VIEW]
Translation Strategy	Dictionary (Translation on Storefront s)	[GLOBAL]
Please put your store into maintenance mode and redeploy static files after changing strategy		
Log JS Errors to Session Storage	No	[GLOBAL]
If enabled, can be used by functional tests for extended reporting		
Log JS Errors to Session Storage Key	collected_errors	[GLOBAL]
Use this key to retrieve collected js errors		

### *JavaScript Settings*

4. Set **Merge JavaScript Files** to “Yes.”
5. When complete, tap **Save Config**.

## Scheduling Design Changes

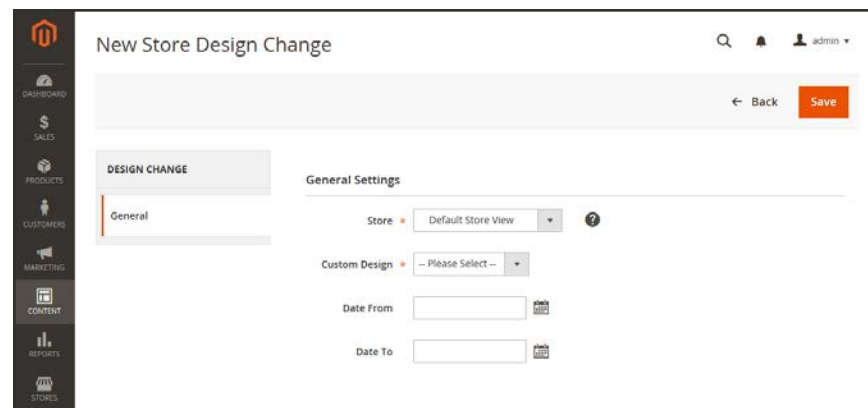
Design changes can be scheduled in advance, so they go into effect on schedule. You can use scheduled design changes for seasonal changes, promotions, or just to add variation.



*Store Design Schedule*

### To schedule a design change:

1. On the Admin sidebar, tap **Content**. Then under **Design**, choose **Schedule**.
2. Tap **Add Design Change**. Then under General Settings, do the following:



*New Design Change*

- a. Set **Store** to the view where the change applies.
  - b. Set **Custom Design** to the theme, or variation of a theme, that is to be used.
  - c. To define the period when the change is in effect, use the calendar (📅) to choose the values for the **Date From** and **Date To** fields.
3. When complete, tap **Save**.







## CHAPTER 49:

# Content Staging

Content Staging gives your business team the ability to easily create, preview, and schedule a wide range of content updates directly from the Admin of your store. For example, rather than thinking in terms of a static page, consider a page to be a collection of different elements that can be turned "on" or "off" according to schedule. You can use Content Staging to create a page that changes automatically throughout the year on schedule.

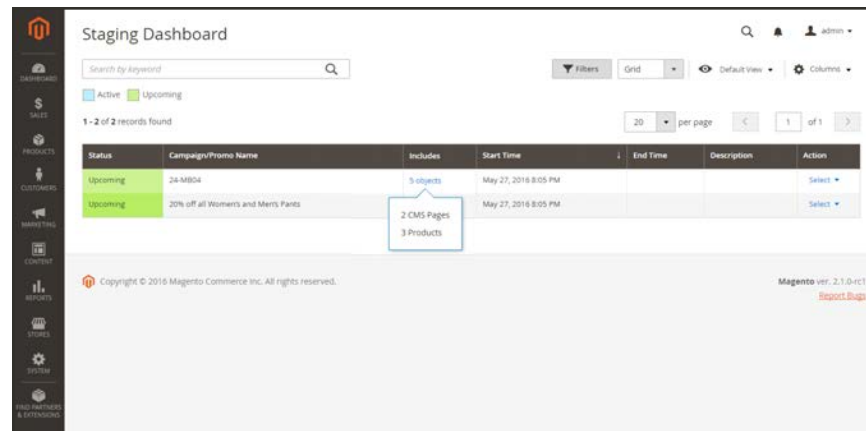
When you schedule a content change for a specific period of time, the content reverts to the previous version when the scheduled change expires. You can create multiple versions of the same baseline content to be used for future updates. You can also step back through the timeline to view previous versions of the content. To save a draft version, simply assign a date on the timeline that is so far into the future that it will never go into production.

You can make updates to the following assets, and then preview and share the changes by date, time, or store view.

- [Products](#)
- [Categories](#)
- [Catalog Price Rules](#)
- [Cart Price Rules](#)
- [CMS Pages](#)
- [CMS Blocks](#)

The Staging Dashboard provides visibility into all planned site changes and updates. Any day, range of dates, or time period of a campaign can be previewed, and shared with others.

The term “campaign” refers to the record of a scheduled change—or collection of changes—that might be viewed on a calendar or timeline, and managed from the Staging Dashboard. The term “scheduled change” and “scheduled update” are interchangeable, and refer to a single change.



Content Staging Dashboard

## Content Staging Workflow

- 1 **Create the baseline content.** The baseline is the content of an asset without a campaign, and includes everything below the Scheduled Changes section at the top of the page. The baseline content is always used, unless there is an active campaign with changes scheduled for that place on the timeline.
- 2 **Create the first campaign.** Create your first campaign with the start and end dates as needed. To make the campaign open-ended, leave the End Date blank. When the first campaign ends, the original baseline content is restored.
- 3 **Add a second campaign.** Create the second campaign, with the start and end dates as needed. The second campaign can be assigned to an entirely different time period. When creating multiple campaigns for the same asset, the campaigns cannot overlap. You can create as many campaigns as needed.
- 4 **Restore the baseline content.** If all campaigns have end dates, the baseline content is restored whenever all active campaigns end.

## Scheduling an Update

The following example shows how to schedule a temporary price change for a product. You will learn how to schedule and preview changes, and also how to view scheduled updates on the calendar. Although this example includes only a single change, a campaign might include multiple changes to products, price rules, CMS pages, and other entities that are scheduled to take place at the same time.

### To schedule an update to a product:

1. From the **Catalog** grid, open a product in edit mode.
2. In the **Scheduled Changes** box at the top of the page, tap **Schedule New Update**.



3. With the **Save as a New Update** option selected, do the following:
  - a. In the **Update Name** field, enter a name for the new content staging campaign.
  - b. Enter a brief **Description** of the update and how it is to be used.
  - c. Use the Calendar (📅) to choose the **Start Date** and **End Date** for the campaign.

To create an open-ended campaign, leave the End Date blank. For this example, the campaign is scheduled to begin the minute the sun reaches the northernmost point of the equator. This year, the summer solstice takes place on June 20th, at 3:34 AM PST.

An End Date cannot later be added to a price rule campaign that was originally created without an end date. In such a case it is necessary to create a duplicate campaign that includes the end date that is needed

The screenshot shows the 'Schedule Update' form for the product 'Joust Duffle Bag'. The form is titled 'Schedule Update' and has a 'Save' button in the top right corner. Below the title, there is a section 'Save as a New Update' with the following fields:

- Update Name:** Duffle Bag Summer Solstice Special
- Description:** A special price on duffle bags for the first day of summer.
- Start Date:** Jun 20, 2016 3:34 AM
- End Date:** Jun 20, 2016 11:59 PM

At the bottom of the form, there is a radio button labeled 'Assign to Existing Campaign'.

*Scheduling a Product Update*

4. Scroll down to the **Price** field, and click **Advanced Pricing**.
5. Enter a **Special Price** for the product during the scheduled campaign. Then, tap **Done**.
6. When complete, tap **Save**.

The scheduled change appears at the top of the product page, with the start and end dates of the campaign.

The screenshot shows the 'Joust Duffle Bag' product page. At the top, there is a 'Scheduled Changes' section with a table showing the scheduled update:

Start	End	Update Name	Description
Jun 20, 2016 3:34 AM	Jun 20, 2016 11:59 PM	Duffle Bag Summer Solstice Special	A special price on duffle bags for the first day of summer.

Below the table, there is a 'View/Edit | Preview' link. The main product details section shows the following information:

- Store View:** All Store Views
- Enable Product:** Yes
- Attribute Set:** Bag
- Product Name:** Joust Duffle Bag
- SKU:** 24-MB01
- Price:** \$ 34.00

At the bottom of the product details section, there is a link to 'Advanced Pricing'.

*Scheduled Change*

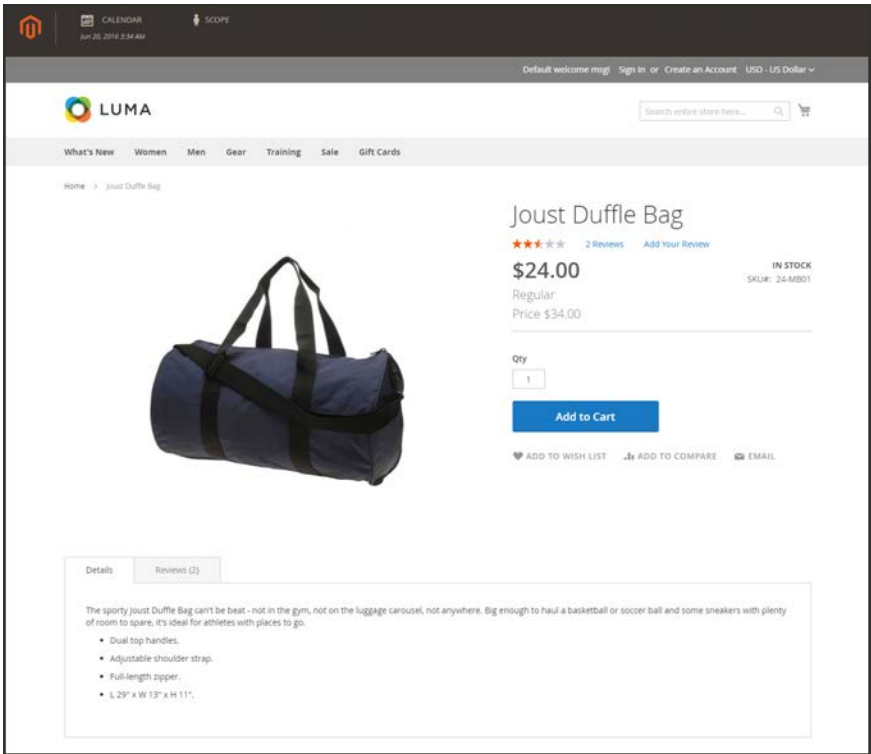
### To edit the scheduled change:

1. In the **Scheduled Changes** box at the top of the page, click **View/Edit**.
2. Make any changes necessary to the scheduled update.
3. Tap **Save**.

To preview the campaign:

- 1. In the **Scheduled Changes** box at the top of the page, click **Preview**.

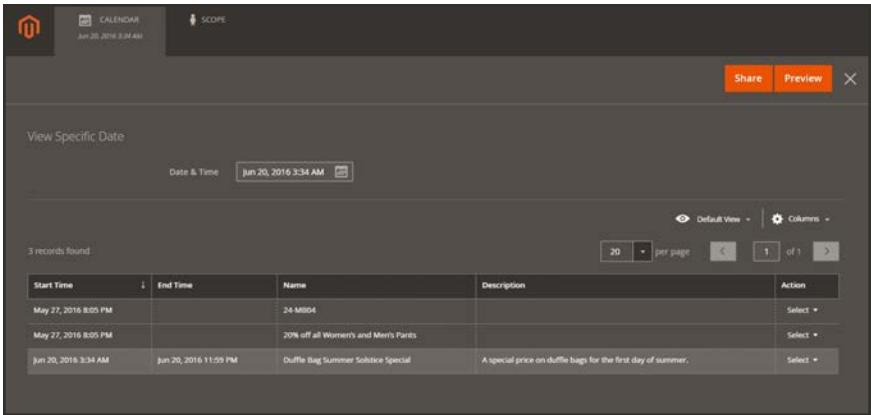
The Preview opens a new browser tab, and shows how the product will appear during the scheduled campaign.




Preview Scheduled Change

- 2. In the upper-left corner of the Preview window, tap **Calendar**.

The calendar detail shows other campaigns that are scheduled for the same day. Each record in the list is a separate campaign.



List of Campaigns Scheduled for a Specific Date

3. To preview a different day or time, tap the **Date & Time** calendar . Then do the following:
  - a. Choose a different date and/or time.
  - b. Tap **Preview**.

In this example, the regular price is restored because the special price is no longer in effect.

4. To return to the campaign calendar, tap **Calendar** in the header of the Preview page. From here, you can do the following:

### Share a Link to the Preview

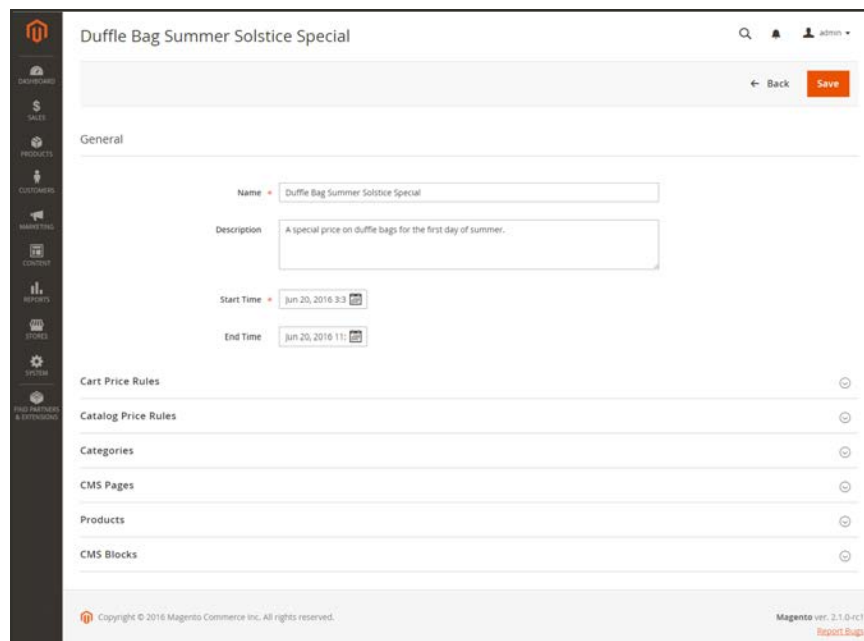
To share a link to the store preview with your colleagues, tap **Share**. Press **Ctrl + C** to copy the link to the clipboard. Then, paste the link into the body of an email message.

### Change the Scope of the Preview

To see scheduled changes for different store views, tap **Scope** in the header of the Preview page. Then, choose the Website, Store or Store View that you want to preview.

5. If necessary, return to the campaign calendar. To view your scheduled change as part of a campaign, select **View/Edit** in the **Action** column of the list.

The page includes the general description of the campaign, with a section for each type of entity that might be included.



The screenshot displays the Magento Admin interface for editing a campaign. The sidebar on the left contains navigation icons for Dashboard, Sales, Products, Customers, Marketing, Content, Reports, Stores, System, and Integrations & Extensions. The main content area is titled 'Duffle Bag Summer Solstice Special' and includes a search bar, a user profile dropdown, and 'Back' and 'Save' buttons. The 'General' section is expanded, showing the following fields:

- Name:** Duffle Bag Summer Solstice Special
- Description:** A special price on duffle bags for the first day of summer.
- Start Time:** Jun 20, 2016 3:3
- End Time:** Jun 20, 2016 11:

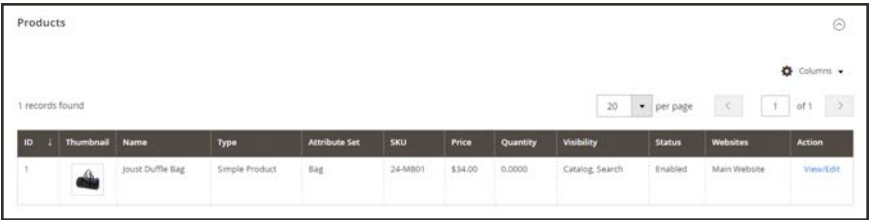
Below the 'General' section are several expandable sections, each with a plus icon:


- Cart Price Rules
- Catalog Price Rules
- Categories
- CMS Pages
- Products
- CMS Blocks

The footer of the page includes the text 'Copyright © 2016 Magento Commerce Inc. All rights reserved.' and 'Magento ver. 2.1.0-rc1 Report Bugs'.

### *Edit Campaign*

6. Expand the **Products** section to see your scheduled update.

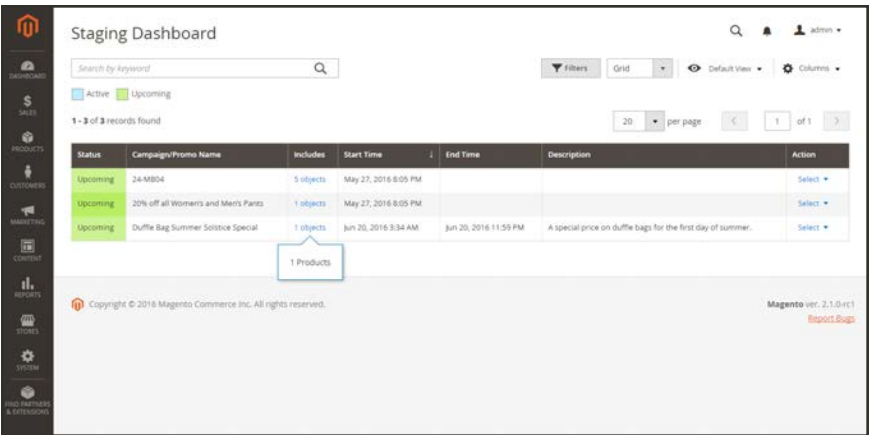


ID	Thumbnail	Name	Type	Attribute Set	SKU	Price	Quantity	Visibility	Status	Websites	Action
1		Joust Duffle Bag	Simple Product	Bag	24-MB01	\$34.00	0.0000	Catalog, Search	Enabled	Main Website	<a href="#">View/Edit</a>

Scheduled Product Update

7. From here, you can do either of the following:
- In the **Action** column, click **View/Edit** to open the scheduled update.
  - To go to the Staging Dashboard, tap **Back** at the top of the page.

The Staging Dashboard provides an overview of all active and upcoming campaigns. Although in this example we arrived at the Staging Dashboard after previewing a scheduled change, it can also be directly accessed from the Content menu. The campaign that we created includes one object—or entity—which is the product that was updated. To learn more, see [Staging Dashboard](#).



Status	Campaign/Promo Name	Includes	Start Time	End Time	Description	Action
Upcoming	24-MB04	5 objects	May 27, 2016 8:05 PM			<a href="#">Select</a>
Upcoming	20% off all Women's and Men's Pants	1 objects	May 27, 2016 8:05 PM			<a href="#">Select</a>
Upcoming	Duffle Bag Summer Solstice Special	1 objects	Jun 20, 2016 3:34 AM	Jun 20, 2016 11:59 PM	A special price on duffle bags for the first day of summer.	<a href="#">Select</a>

Staging Dashboard

## Staging Dashboard

The Staging Dashboard provides an overview of all active and upcoming campaigns. The format of the dashboard can be changed from a grid to a timeline. You can also use filters to find campaigns, customize the column layout, and save different views of the grid. To learn more about the workspace controls, see: [Admin Workspace](#).

Staging Dashboard

Search by keyword

Filters Grid Default View Columns

Active Upcoming

1 - 3 of 3 records found

20 per page 1 of 1

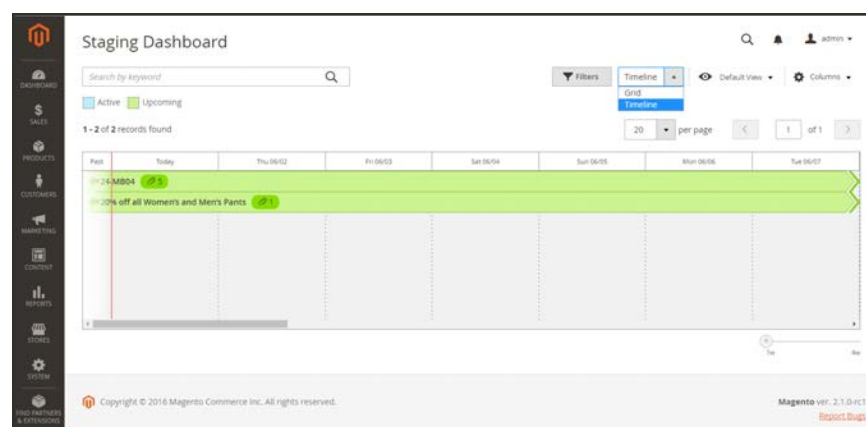
Status	Campaign/Promo Name	Includes	Start Time	End Time	Description	Action
Upcoming	24-MB04	5 objects	May 27, 2016 8:05 PM			Select
Upcoming	20% off all Womens and Mens Pants	1 objects	May 27, 2016 8:05 PM			Select
Upcoming	Duffle Bag Summer Solstice Special	1 objects	Jun 20, 2016 3:34 AM	Jun 20, 2016 11:59 PM	A special price on duffle bags for the first day of summer.	Select

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*Grid View*

### To open the Staging Dashboard:

1. On the Admin sidebar, tap **Content**.
2. On the menu under **Staging**, choose **Dashboard**.
3. To change the format of the dashboard, set the **View As** control to “Timeline.”



*Timeline View*

The slider in the lower-right corner can be used to adjust the view from one to four weeks. Each column represents one day.

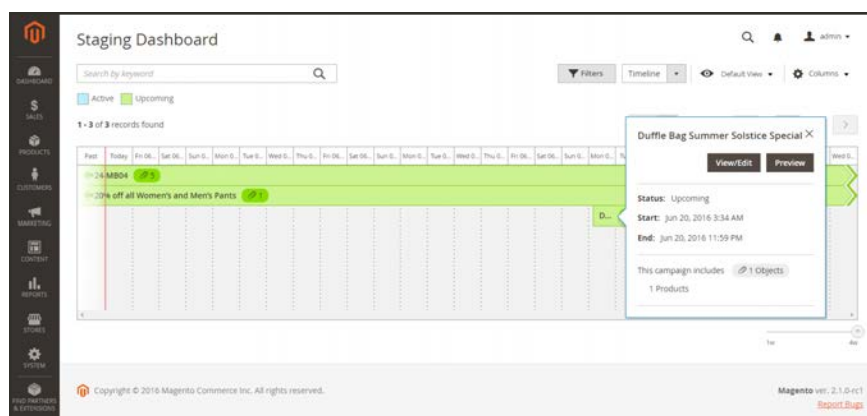


4. Drag the slider to the “4w” position on the far right. The campaign that is scheduled for June 20 is now visible in the timeline.



*4-Week View*

5. Click any item in the timeline to display general information about the campaign.
  - To open the campaign, tap **View/Edit**.
  - To see how the campaign will look to customers in the store on that day, tap **Preview**.



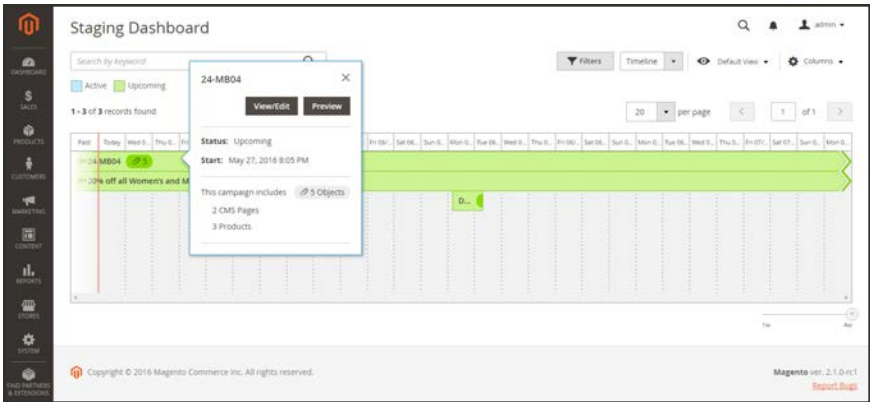
*Campaign Information*

## Editing a Campaign

Existing campaign objects can be edited from the Dashboard, with the exception of price rule campaigns that do not have end dates.


If a campaign that includes a price rule is initially created without an end date, the campaign cannot later be edited to include an end date. In such a case, it is necessary to create a duplicate campaign that has an end date as needed.




Follow the steps below to edit any of the objects in this campaign.



Campaign Detail

### To edit a campaign:

- 1. On the Admin menu, tap **Content**. Then under **Staging**, choose **Dashboard**.
- 2. On the timeline, choose the campaign to be updated. Then, tap **View/Edit**.  
The campaign in this example includes two CMS pages and three products.
- 3. Update the fields in the **General** information section as needed.
- 4. Expand  the section that contains the item to be edited. Then, do the following:

Products										
3 records found										
ID	Thumbnail	Name	Type	Attribute Set	SKU	Price	Quantity	Visibility	Status	Websites
2		Strive Shoulder Pack	Simple Product	Bag	24-MB04	\$32.00	100.0000	Catalog, Search	Enabled	Main Website
7		Impulse Duffel	Simple Product	Bag	24-UB02	\$74.00	100.0000	Catalog, Search	Enabled	Main Website
19		Go-Getty Pushup Grips	Simple Product	Gear	24-UG05	\$19.00	100.0000	Catalog, Search	Enabled	Main Website

View/Edit Campaign Item

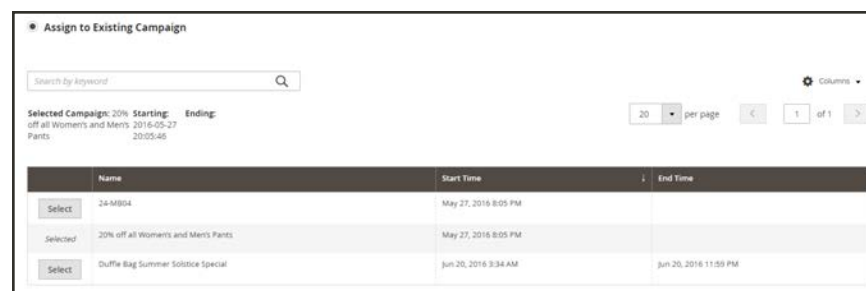
- a. Make any changes necessary to the campaign item.
- b. Tap **Save**.

## Adding an Item


In this example, we will add an image to the category page for the duration of the campaign.

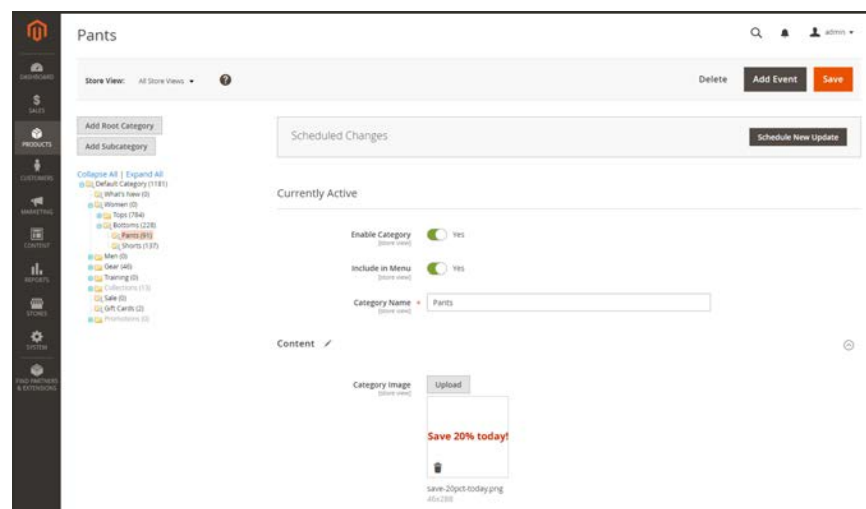
### To add a new item to a campaign:

1. Open the category to be edited.
2. Tap **Schedule New Update**.
3. Select **Assign to Existing Campaign**. Then, do the following:
  - a. In the list, select the campaign to be modified.



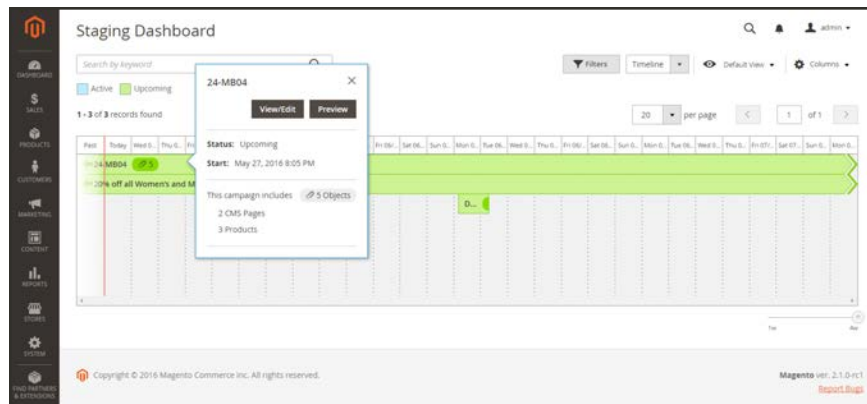
*Assign to Existing Campaign*

- b. Under **General Information**, expand  the **Content** section.
- c. At the **Category Image** field, tap **Upload**. Then, navigate to the image that is to appear on the category page during the campaign.



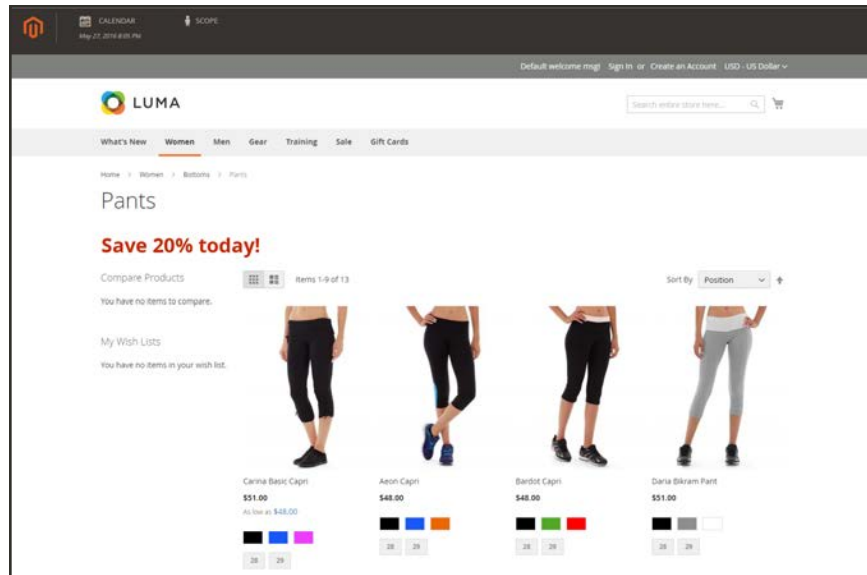
*Add Category Image*

4. When complete, tap **Save**.
5. On the Admin menu, tap **Content**. Then under **Staging**, choose **Dashboard**.



*Campaign Detail*

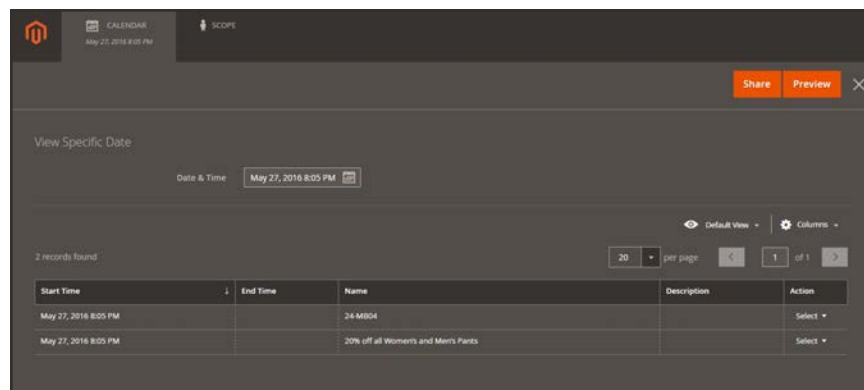
6. Find the campaign in the list. Click once to view the detail, and tap **View/Edit**.



*Preview of Category Image During Campaign*

## Previewing a Campaign

Any day or period of time during a campaign can be previewed and shared with others.

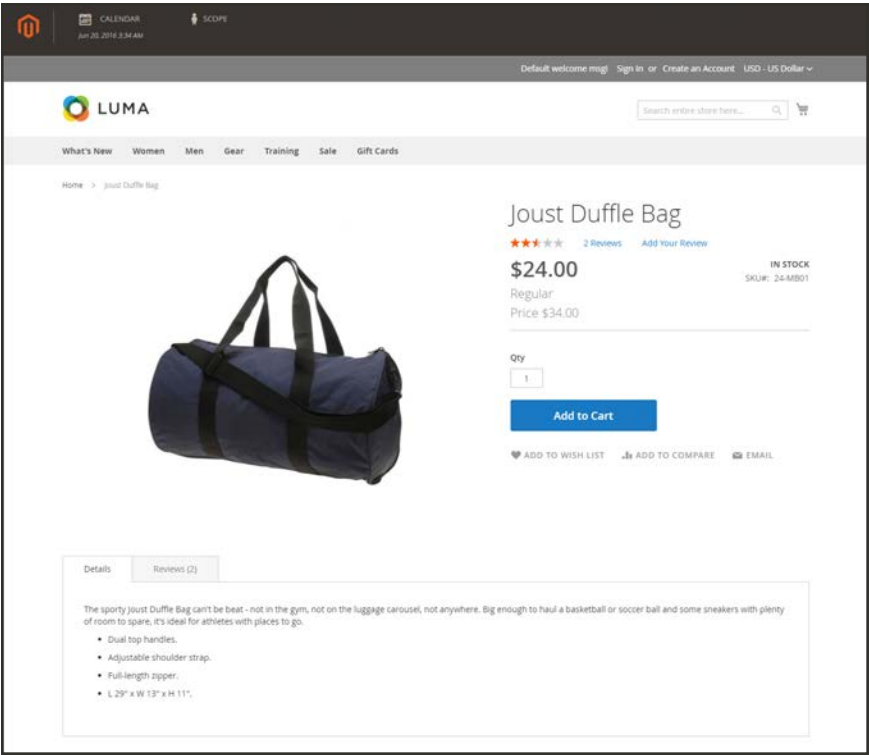


*Preview*

### To preview a campaign:

- Do one of the following:
  - On the Admin menu, tap **Content**. Then under **Staging**, choose **Dashboard**.
  - On a page with a **Scheduled Changes** box at the top of the page, click **Preview**.

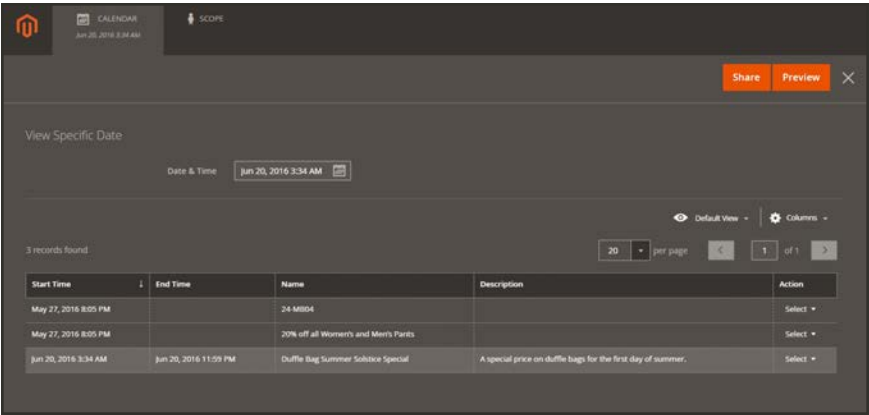
The Preview opens a new browser tab, and shows how the product will appear during the scheduled campaign.




Preview Scheduled Change

2. In the upper-left corner of the Preview window, tap **Calendar**.

The calendar detail shows other campaigns that are scheduled for the same day. Each record in the list is a separate campaign.



List of Campaigns Scheduled for a Specific Date

3. To preview a different day or time, tap the **Date & Time** calendar (  ). Then do the following:
  - a. Choose a different date and/or time.
  - b. Tap **Preview**.

In this example, the regular price is restored because the special price is no longer in effect.

4. To change the scope of the preview for a different store view, do the following:
  - a. In the header of the Preview page, tap **Scope**.
  - b. Choose the Website, Store or Store View that you want to preview.
5. To share a link to the preview, do the following:
  - a. Tap **Share**. Then, press **Ctrl + C** to copy the link to the clipboard.
  - b. Paste the link into the body of an email message.
6. To return to the campaign calendar, tap **Calendar** in the header of the Preview page.



# CUSTOMERS

## Contents

In this section of the guide, you will become familiar with the customer account dashboard, and learn to configure customer accounts according to your preference. You will also learn how to create customer groups that can be referenced in promotions and tax classes.

### Customers Menu

- All Customers

- Now Online

### Customer Accounts

- Customer Sign In

- Account Dashboard

- Configuring Customer Accounts

  - Online Session Length

  - Login Landing Page

  - New Account Options

  - Name and Address Options

  - Password Options

### Customer Groups

### Customer Segments

- Customer Segment Attributes

- Creating a Customer Segment

- Targeting Customer Segments in Price Rules

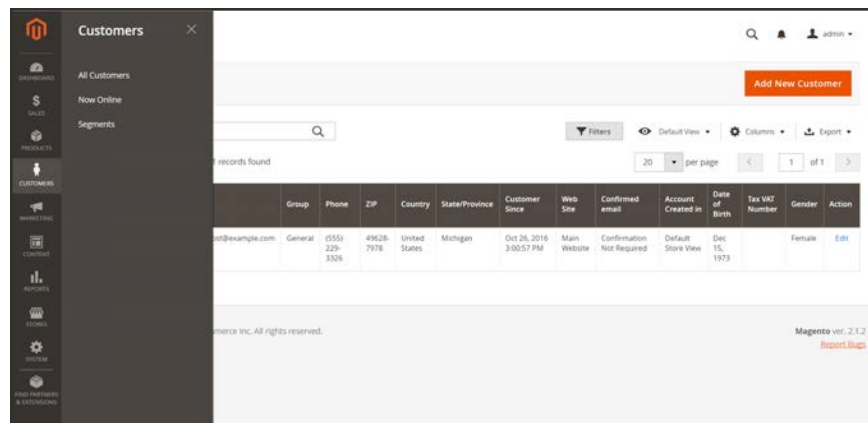
- Targeting Customer Segments with Banners

- Customer Segment Reports

## CHAPTER 50:

# Customers Menu

The Customers menu provides access to customer account management tools, and gives you the ability to see who is currently online in your store.



*Customers Menu*

## To display the Customers menu:

On the Admin sidebar, tap **Customers**.

## Menu Options

The screenshot shows the 'Customers' menu option. It features a search bar at the top with the text 'Search by keyword'. Below the search bar is a table with columns: Name, Email, Group, Phone, ZIP, Country, Birth/Death, Customer ID, and Customer Email. The table contains five rows of customer data. At the top right of the table, there is a button labeled 'Add New Customer'.

### All Customers

Lists all customers who have registered for an account with your store, or were added by the administrator.

The screenshot shows the 'Customers Now Online' menu option. It features a search bar at the top with the text 'Search by keyword'. Below the search bar is a table with columns: Name, Last Name, Email, and Last Online. The table contains five rows of customer data. At the top right of the table, there is a button labeled 'Add New Customer'.

### Now Online

Lists all customers and visitors who are currently online in your store.

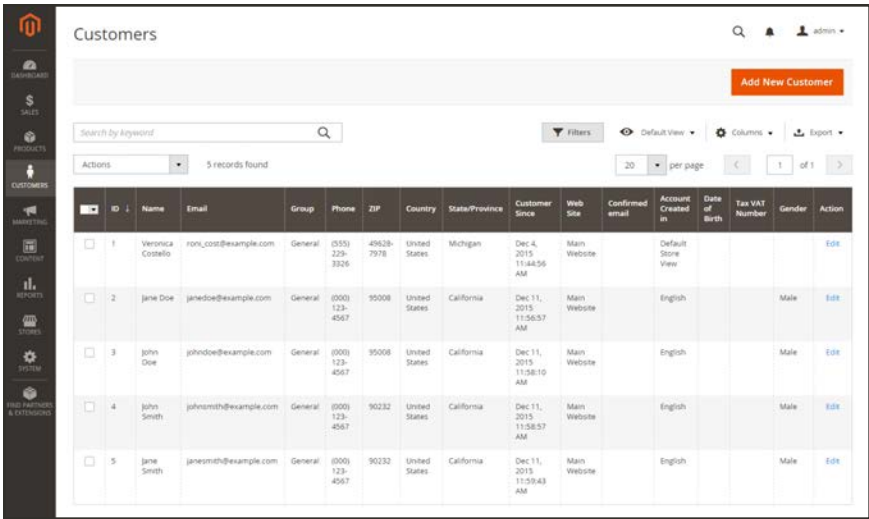
The screenshot shows the 'Millennials' menu option. It features a search bar at the top with the text 'Search by keyword'. Below the search bar is a table with columns: Name, Email, Group, Phone, ZIP, Country, Birth/Death, Customer ID, and Customer Email. The table contains five rows of customer data. At the top right of the table, there is a button labeled 'Add New Customer'.

### Segments

Dynamically display content and promotions to specific customers, based on properties such as customer address, order history, shopping cart contents, and more.

# All Customers

The Customers page lists all customers who have registered for an account with your store, or were added by the administrator.



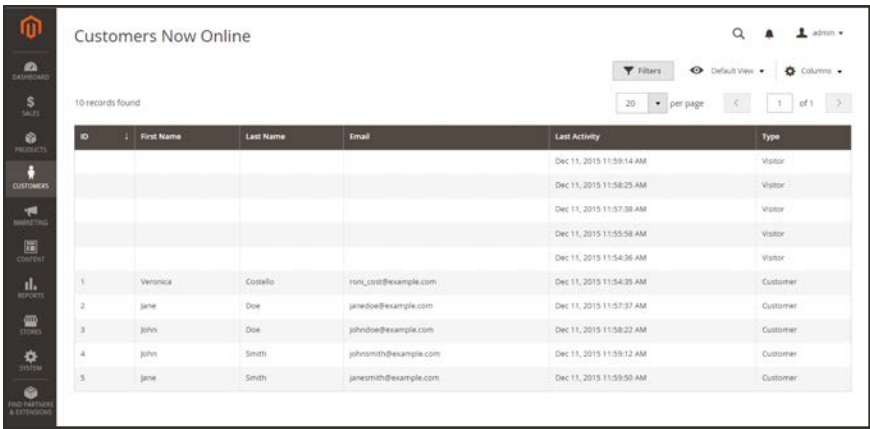
All Customers

## To view customer information:

- 1. On the Admin sidebar, tap **Customers**. Then, choose **All Customers**.
- 2. Open any customer record in edit mode.
- 3. In the panel on the left, choose the information you need to edit. Then, make the necessary changes.
- 4. When complete, tap **Save Customer**.

# Now Online

The Now Online option on the Customers menu lists all customers and visitors who are currently online in your store. The length of the **online session** is set in the configuration, and determines how long the customer’s activity is visible from the Admin. By default, a customer’s online session lasts fifteen minutes.



ID	First Name	Last Name	Email	Last Activity	Type
				Dec 11, 2015 11:58:14 AM	Visitor
				Dec 11, 2015 11:58:25 AM	Visitor
				Dec 11, 2015 11:57:38 AM	Visitor
				Dec 11, 2015 11:55:58 AM	Visitor
				Dec 11, 2015 11:54:36 AM	Visitor
1	Veronica	Costello	roni_cost@example.com	Dec 11, 2015 11:54:35 AM	Customer
2	jane	Doe	janedoe@example.com	Dec 11, 2015 11:57:37 AM	Customer
3	john	Doe	johndoe@example.com	Dec 11, 2015 11:58:22 AM	Customer
4	john	Smith	johnsmith@example.com	Dec 11, 2015 11:59:12 AM	Customer
5	jane	Smith	jan smith@example.com	Dec 11, 2015 11:59:50 AM	Customer

Online Customers

## To see all customers who are online now:

- 1. On the Admin sidebar, tap **Customers**.
- 2. Choose **Online Now**.

To help an online customer complete a purchase, see: [Shopping Assistance](#).

**Column Descriptions**

COLUMN	DESCRIPTION
ID	The customer ID of a registered customer.
First Name	The first name of a registered customer.
Last Name	The last name of a registered customer.
Email	The email address of a registered customer.
Last Activity	The date and time of the customer's last activity in your store.
Type	Identifies the type of shopper: Options include: Customer / Visitor





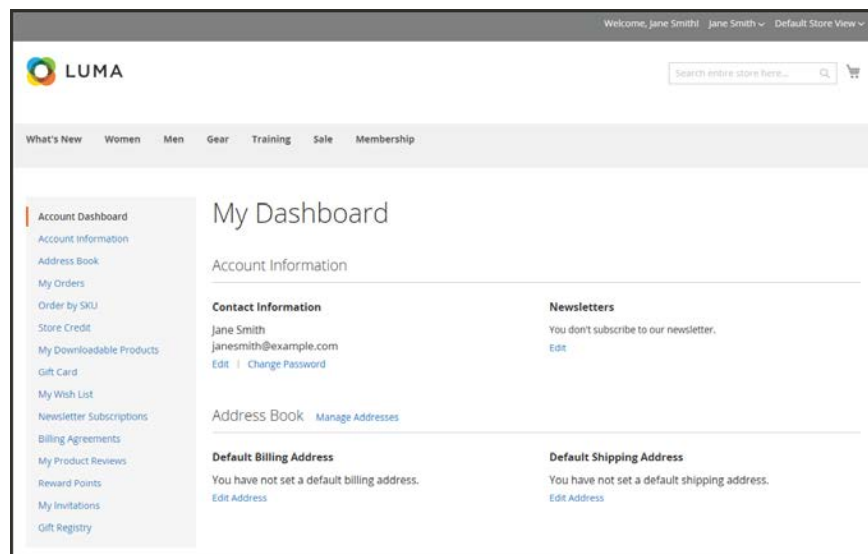
## CHAPTER 51:

# Customer Accounts

The header of every page in your store extends an invitation for shoppers to “Log in or register” for an account with your store. Customers who open an account with your store enjoy a range of benefits, including:

- ☒ **Faster checkout.** Registered customers move through checkout faster because much of the information is already in their accounts.
- ☒ **Self service.** Registered customers can update their information, check the status of orders, and even reorder from their account dashboard.

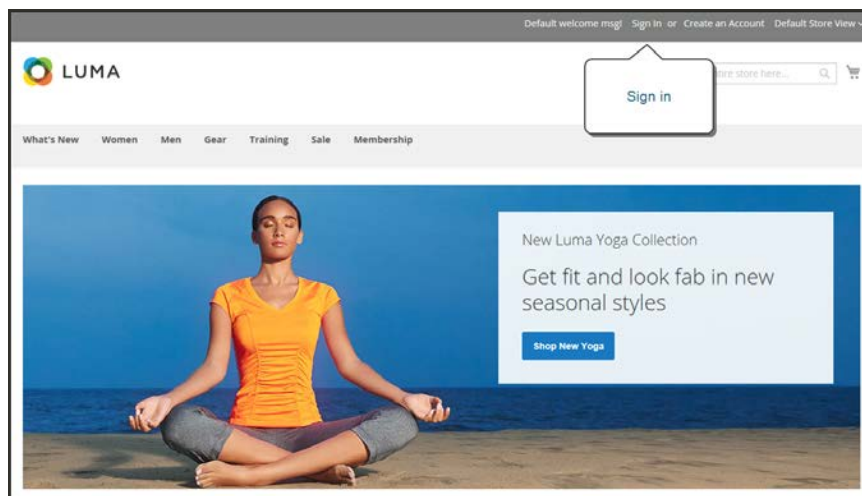
Customers can access their account dashboard by clicking the “My Account” link in the header of the store. They can use their account dashboard to view and modify their information, including past and current addresses, billing and shipping preferences, newsletter subscriptions, wishlist, and more.



*Account Dashboard*

## Customer Sign In

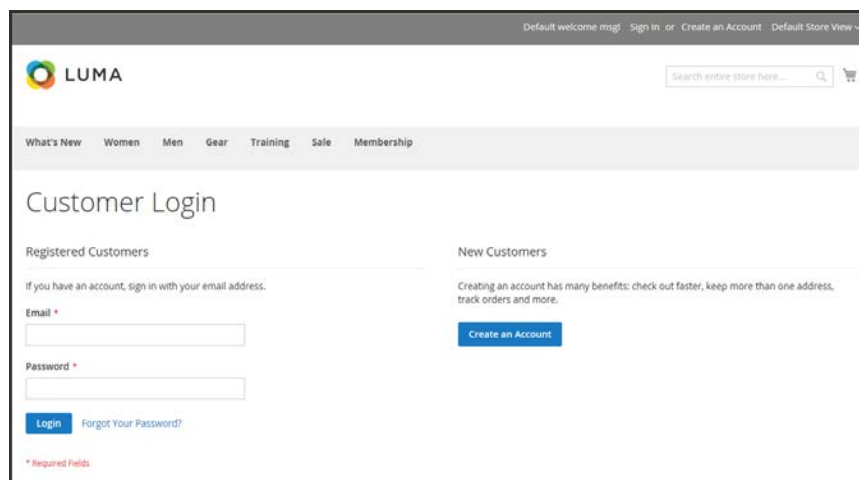
Customers have easy access to their accounts from every page in your store. Depending on the configuration, customers can be redirected to their account dashboard, or continue shopping after they log in to their accounts. When customers forget their passwords, a reset link is sent to the email address that is associated with the account.



*Sign In*

### To sign in to your customer account:

1. In the header of the store, tap **Sign in**.
2. When prompted, enter the **Email Address** that is associated with your account, and your **Password**. Then, tap **Login**.



*Customer Login*

### To reset your password:

1. On the Login page, tap **Forgot Your Password?**.
2. When prompted, enter the **Email Address** that is associated with your account, and tap **Submit**.

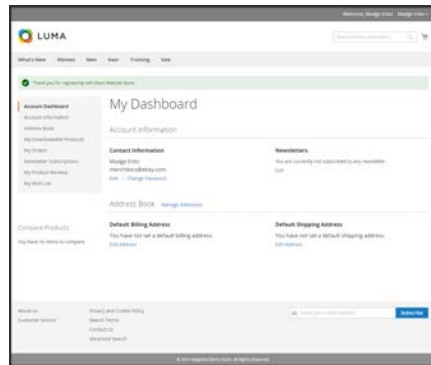
If the email address you entered matches the one that is associated with the account, you will receive a "Password Reset Confirmation" email with a link to reset your password.

3. Tap the link in the email, and when prompted, enter your **New Password**. Enter it again to confirm, and tap **Reset Password**.

Your new password must be six or more characters in length, without spaces.

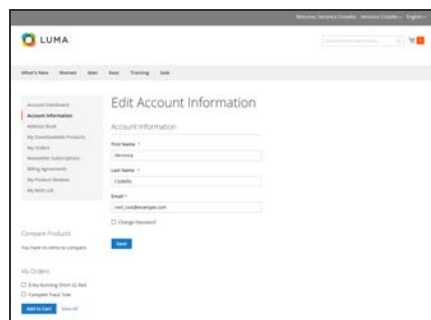
When you receive confirmation that the password is updated, you can use the new password to log in to your account.

# Account Dashboard



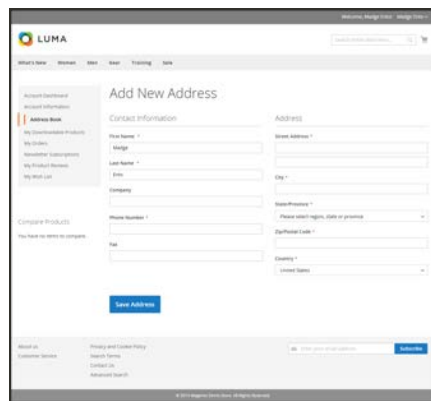
## My Dashboard

The customer's account dashboard gives them the ability to track orders, manage shipping addresses, and manage other store activities.



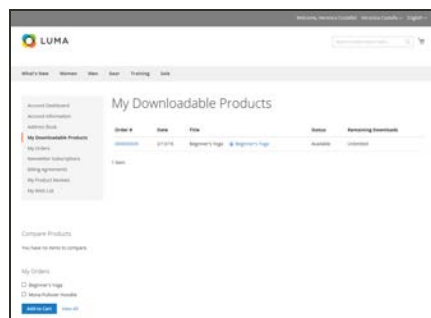
## Account Information

Customers can update their account information and change their password as needed. The store Admin can also update customer accounts and access the information to offer shopping assistance.



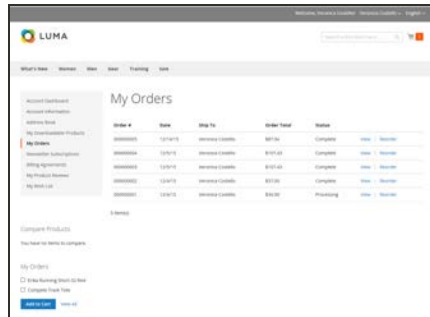
## Address Book

The customer address book includes the default billing and shipping address, and additional address entries.



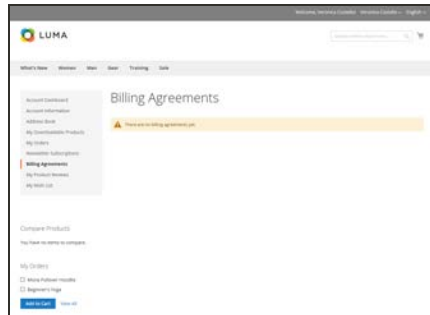
## Downloadable Products

Lists all downloadable products the customer has purchased, with a link to each.



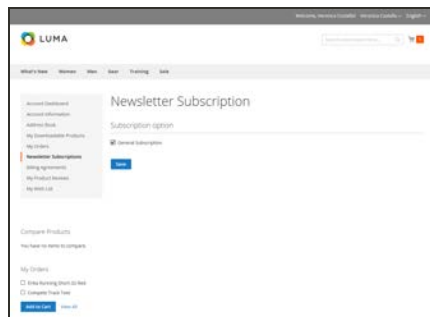
## Orders

Displays a list of all customer orders, with a link to each. If enabled in the configuration, any order can be reordered by simply clicking the Reorder link.



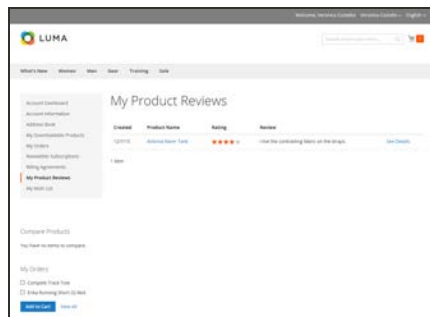
## Billing Agreements

Displays a list of any customer billing agreements.



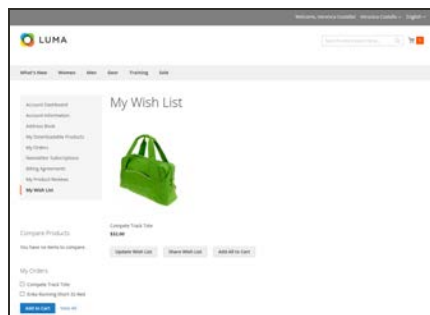
## Newsletter Subscriptions

Lists all available newsletters. Those to which the customer is currently subscribed have a checkmark.



## My Product Reviews

Displays a list of all product reviews submitted by the customer, with a link to each.



## My Wish List

This section is a placeholder for API applications that link the customer account to other applications or extensions.

## Configuring Customer Accounts

The customer account settings determine the information that is collected during customer registration, and the experience that customers have during the process. Customer configuration settings include:

- [Online Session Length](#)
- [Account Scope](#)
- [Login Landing Page](#)
- [New Account Options](#)
- [Name and Address Options](#)
- [Password Options](#)

## Online Session Length

The length of each customer session is set by default to fifteen minutes. If there is no keyboard activity during that time, the current session ends, and customers must log back into their accounts to continue shopping. If **Persistent Cart** is enabled, the contents of their carts are saved for the next time they sign in to their accounts.



Online Customers Options

Online Minutes Interval

Leave empty for default (15 minutes).

*Online Customers Options*

### To configure the online session length:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Online Now**.
2. In the panel on the left under **Customers**, choose **Customer Configuration**.
3. Expand ☯ the **Online Customers Options** section.
4. In the **Online Minutes Interval** field, enter the number of minutes before the customer session. Leave the field empty to accept the default interval of fifteen minutes.
5. When complete, tap **Save Config**.

## Login Landing Page

You can configure your store to redirect customers to their account dashboard after they log in, or let them continue shopping.

### To set the login landing page:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Customers**, choose **Customer Configuration**.
3. Expand ☺ the **Login Options** section.

A screenshot of the 'Login Options' configuration panel. The panel has a title 'Login Options' and a close button (⊘) in the top right corner. Inside the panel, there is a section titled 'Redirect Customer to Account Dashboard after Logging in' with a sub-label '(Website)'. To the right of this title is a dropdown menu currently showing 'Yes'. Below the dropdown, a note states: 'Customer will stay on the current page if "No" is selected.' To the right of the dropdown is a checkbox labeled 'Use system value', which is currently checked.

### *Login Options*

4. Set **Redirect Customer to Account Dashboard after Logging in** to one of the following:  
  
Yes      The account dashboard appears when customers log in to their accounts.  
  
No      Customers can continue shopping after logging in to their accounts.
5. When complete, tap **Save Config.**



## New Account Options

In the Create New Account Options section of the configuration, the basic account options are combined with more advanced options that relate to VAT ID Validation and custom integrations. The following instructions cover only the most frequently used options. To learn about automatic customer group assignments, see: [VAT ID Validation](#).

Create New Account Options

Enable Automatic Assignment to Customer Group

No

[store view]

Default Group

General

[store view]

Use system value

Default Value for Disable Automatic Group Changes Based on VAT ID

No

[global]

Show VAT Number on Storefront

No

[website]

Use system value

To show VAT number on Storefront, set Show VAT Number on Storefront option to Yes.

Default Email Domain

example.com

[store view]

Use system value

Default Welcome Email

New Account (Default)

[store view]

Use system value

Email template chosen based on theme fallback when "Default" option is selected.

Default Welcome Email Without Password

New Account Without Password (Default)

[store view]

Use system value

This email will be sent instead of the Default Welcome Email, if a customer was created without password.

Email template chosen based on theme fallback when "Default" option is selected.

Email Sender

General Contact

[store view]

Use system value

Require Emails Confirmation

No

[website]

Use system value

Confirmation Link Email

New Account Confirmation Key (Default)

[store view]

Use system value

Email template chosen based on theme fallback when "Default" option is selected.

Welcome Email

New Account Confirmed (Default)

[store view]

Use system value

This email will be sent instead of the Default Welcome Email, after account confirmation.

Email template chosen based on theme fallback when "Default" option is selected.


Generate Human-Friendly Customer ID

No

[global]

*Create New Account Options*


### To set up the basic customer account options:

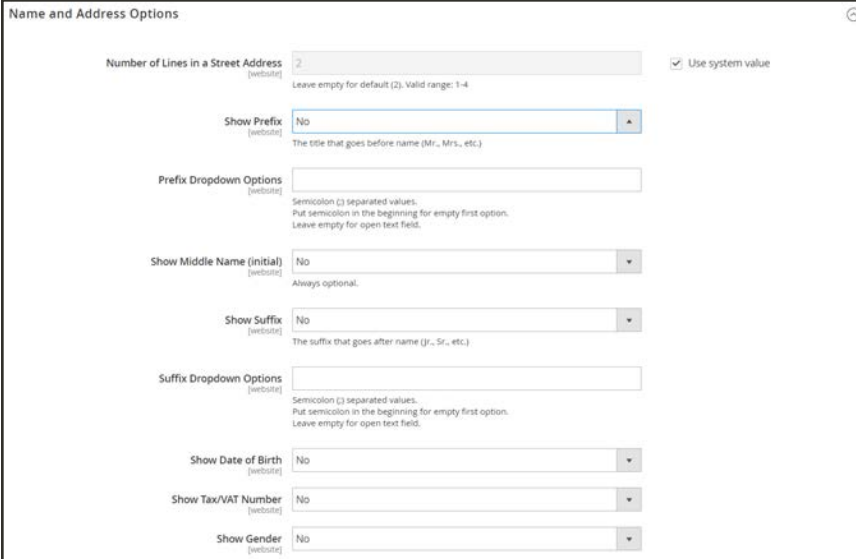
1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Customers**, choose **Customer Configuration**.
3. Expand  the **Create New Account Options** section. Then, do the following:
  - a. Set **Default Group** to the customer group that is assigned to new customers when an account is created.
  - a. If you have a Value Added Tax number, and want it to be visible to customers, set **Show VAT Number on Storefront** to “Yes.”
  - b. Enter the **Default Email Domain** for the store. For example: mystore.com
  - c. Set **Default Welcome Email** to the template that is used for the Welcome email sent to new customers.
  - d. Set **Default Welcome Email without Password** to the template that is used when a customer account is created that does not yet have a password. For example, a customer account created from the Admin does not yet have a password assigned.
  - e. Set **Email Sender** to the store contact that appears as the sender of the Welcome email.
  - f. To require that customers confirm their request to open an account with your store, set **Require Emails Confirmation** to “Yes.” Then, set **Confirmation Link Email** to the template that is used for the confirmation email.
  - g. Set **Welcome Email** to the template that is used for the Welcome message that is sent after the account is confirmed.
4. When complete, tap **Save Config**.

## Name and Address Options

The Name and Address Options determine the values in the drop-down lists for the prefix and suffix part of the customer name.

### To configure the customer name and address:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Customers**, choose **Customer Configuration**.
3. Expand  the **Name and Address Options** section.



**Name and Address Options**

Number of Lines in a Street Address  Leave empty for default (2). Valid range: 1-4. ☒ Use system value

Show Prefix  The title that goes before name (Mr., Mrs., etc.)

Prefix Dropdown Options  Semicolon (;) separated values. Put semicolon in the beginning for empty first option. Leave empty for open text field.

Show Middle Name (initial)  Always optional.

Show Suffix  The suffix that goes after name (Jr., Sr., etc.)

Suffix Dropdown Options  Semicolon (;) separated values. Put semicolon in the beginning for empty first option. Leave empty for open text field.

Show Date of Birth

Show Tax/VAT Number

Show Gender


*Name and Address Options*

1. Enter the **Number of Lines in a Street Address**. If left blank, the street address defaults to 2.
2. To include a prefix before the name, do the following:
  - a. Set **Show Prefix** to one of the following:
    - Optional
    - Required
  - b. In the **Prefix Dropdown Options** field, enter each prefix that you want to appear in the list, separated by a semicolon. Place a semicolon before the first value to display an empty value at the top of the list.
3. To include a suffix after the name, do the following:
  - a. Set **Show Suffix** to one of the following:
    - Optional
    - Required
  - b. In the **Suffix Dropdown Options** field, enter each prefix that you want to appear in the list, separated by a semicolon. Place a semicolon before the first value to display an empty value at the top of the list.
4. To include additional fields, do the following:
  - a. Set **Show Date of Birth** to “Yes.”
  - b. Set **Show Tax/VAT Number** to “Yes.”
  - c. Set **Show Gender** to “Yes.”
5. When complete, tap **Save Config.**

# Password Options

The customer password options control the level of security that is used for password reset requests, and determines the email templates that are used for customer notification, and the lifetime of the password recovery link. You can allow customers to change their own passwords, or require that only store administrators can do so

## To configure customer password options:

- 1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
- 2. In the panel on the left under **Customers**, choose **Customer Configuration**. Then, expand  the **Password Options** section.

Password Reset Protection Type

By IP and Email

Use system value

Max Number of Password Reset Requests

5

Use system value

Min Time Between Password Reset Requests

10

Use system value

Forgot Email Template

Forgot Password (Default)

Use system value

Remind Email Template

Remind Password (Default)

Use system value

Reset Password Template

Reset Password (Default)

Use system value

Password Template Email Sender

Customer Support

Use system value

Recovery Link Expiration Period (hours)

2

Use system value

Number of Required Character Classes

3

Use system value

Maximum Login Failures to Lockout Account

10

Use system value

Minimum Password Length

8

Use system value

Lockout Time (minutes)

10

Use system value

Use system value

Use system value

Use system value

Use system value

Use system value

Use system value

Use system value

Use system value

Use system value

Use system value

*Password Options*

- 3. Set **Password Reset Protection Type** to the method you want to use for managing password reset requests:

- By IP and Email

The password can be reset online after a response is received from a reset notification sent to the email address associated with the Admin account.
- By IP

The password can be reset online without additional confirmation.

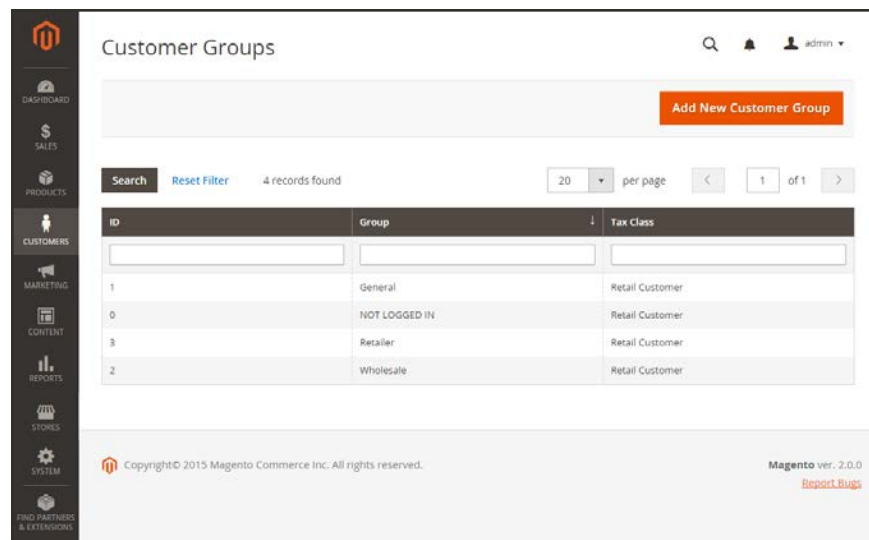
By Email	The password can be reset only by responding to an email notification that is sent to the email address associated with the Admin account.
None	The password can be reset only by the store administrator.

4. To limit the number of password reset requests sent per hour, do the following:
  - a. In the **Max Number of Password Reset Requests** field, enter the maximum number of password reset requests that can be sent per hour.
  - b. In the **Min Time Between Password Reset Requests** field, enter the minimum number of minutes that must elapse between requests.
5. To configure the password reset email notification, do the following:
  - a. Set **Forgot Email Template** to the template that is used for the email sent to customers who have forgotten their passwords.
  - b. Set **Remind Email Template** to the template that is used when a password hint is sent to customers.
  - c. Set **Reset Password Template** to the template that is used when customers change their passwords.
  - d. Set **Password Template Email Sender** to the **store contact** that appears as the sender of password-related notifications.
6. Complete the following password reset security options:
  - a. In the **Recovery Link Expiration Period (hours)** field, enter the number of hours before the password recovery link expires.
  - b. In the **Number of Required Character Classes** field, enter the number of different character types that must be included in a password, based on the following character classes:
    - Lowercase
    - Uppercase
    - Numeric
    - Special Characters
  - c. In the **Maximum Login Failures to Lockout Account** field, enter the number of failed login attempts until the Admin account is locked. For unlimited attempts, enter zero (0).
  - d. In the **Minimum Password Length** field, enter the minimum number of characters that can be used in a password. The number must be greater than zero.
  - e. In the **Lockout Time (minutes)** field, enter the number of minutes an Admin account is locked after too many failed attempts to log in.
7. When complete, tap **Save Config**.

## CHAPTER 52:

# Customer Groups

Customer groups determine which discounts are available, and the tax class that is associated with the group. The default customer groups are General, Not Logged In, and Wholesale.



*Customer Groups*

### To create a customer group:

1. On the Admin sidebar, tap **Customers**. Then choose **Customer Groups**.
2. Tap **Add New Customer Group**. Then, do the following:
  - a. Enter a unique **Group Name** less than 32 characters to identify the group.
  - b. Select the **Tax Class** that applies to the group.

The screenshot shows the 'New Customer Group' form in the Magento Admin interface. The sidebar on the left contains navigation links for DASHBOARD, SALES, PRODUCTS, CUSTOMERS, MARKETING, CONTENT, REPORTS, and STORES. The main form area is titled 'New Customer Group' and includes a search bar, a notification bell, and a user profile icon labeled 'admin'. Below the title bar, there are 'Back', 'Reset', and 'Save Customer Group' buttons. The 'Group Information' section contains a 'Group Name' field with the value 'Members' and a note 'Maximum length must be less than 32 symbols'. The 'Tax Class' dropdown menu is set to 'Retail Customer'. The footer of the page displays 'Copyright© 2015 Magento Commerce Inc. All rights reserved.' and 'Magento ver. 2.0.0' with a 'Report Bugs' link.

### *Group Information*

3. When complete, tap **Save Customer Group**.

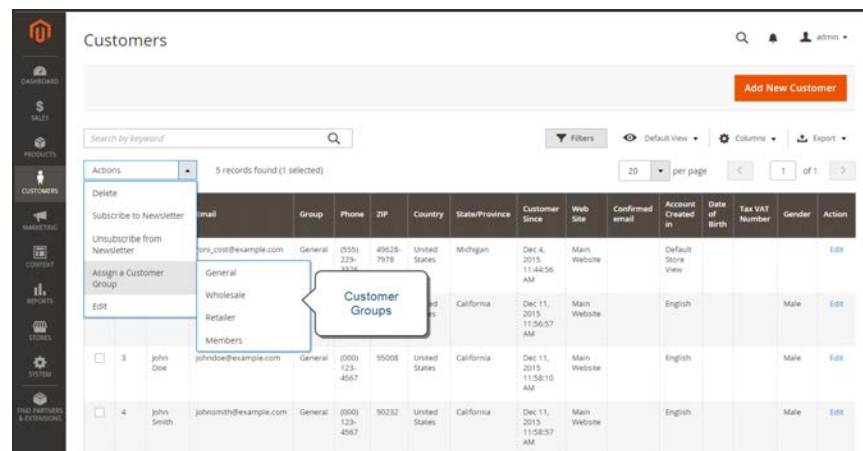
### **To edit a customer group:**

1. On the Admin sidebar, tap **Customers**. Then choose **Customer Groups**.
2. Open the record in edit mode.
3. Make the necessary changes.
4. When complete, tap **Save Customer Group**.



## To assign a customer to a different group:

1. On the Admin sidebar, tap **Customers**. Then, choose **All Customers**.
2. Find the customer in the list, and mark the checkbox in the first column. Then, do the following:
  - a. Set the **Actions** control to “Assign a Customer Group.”
  - b. Set the **Group** control to the new group.
  - c. When prompted to confirm, tap **OK**.



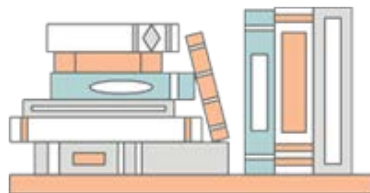
*Assign a Customer Group*



## CHAPTER 53:

# Customer Segments

Customer segments allow you to dynamically display content and promotions to specific customers, based on properties such as customer address, order history, shopping cart contents, and so on. You can optimize marketing initiatives based on targeted segments with shopping cart price rules and banners. You can also generate reports and export the list of targeted customers. Because customer segment information is constantly refreshed, customers can become associated and disassociated from a segment as they shop in your store.



## Magento eBooks

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### Customer Segmentation

Learn how to increase profits and overall customer satisfaction. Get the [eBook](#) now!

### Segmentation Tactics

Improve the targeting of your messages and promotions to create meaningful conversations with your customers. Get the [eBook](#) now!

## Customer Segment Attributes

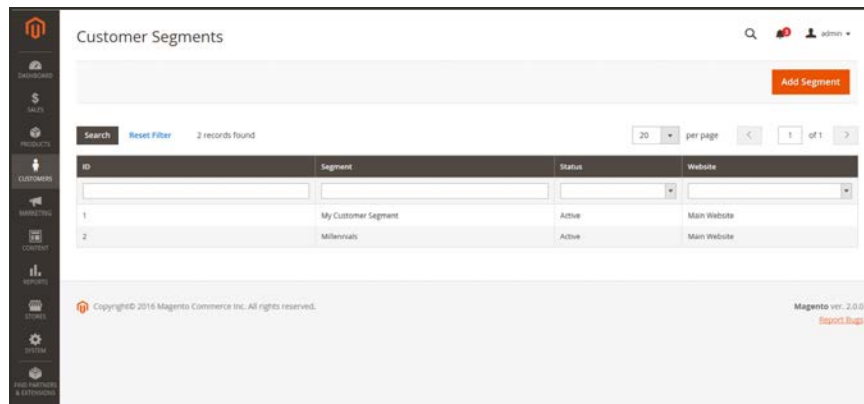
Customer segments are defined in a manner similar to shopping cart and catalog price rules. For an attribute to be used in a customer segment condition, the **Use in Customer Segment** property must be set to “Yes.” Customer segment conditions can incorporate the following types of attributes:

### Customer Segment Attributes

ATTRIBUTE	DESCRIPTION
Customer Address Fields	You can define any of the address fields, such as city or country. Any address in a customer's address book can match these conditions for the customer to match. Or, you can specify that only the default billing or shipping addresses can be used to match a customer. Customer address attributes are available only for customers who are logged in to their accounts.
Customer Information Fields	Miscellaneous customer information can be defined, including Customer Group, name, email, newsletter subscription status, and Store Credit balance. Customer information is available only for customers who are logged in to their accounts.
Cart Fields	Cart properties can be based on either quantity (line items or total quantity) or the value (grand total, tax, gift card, etc.) of the cart contents.
Products	You can reference products that are currently in the shopping cart or wish list, or that have previously been viewed or ordered. You can also set a date range for when this occurred. The products are defined using product attributes.
Order Fields	Order characteristics for past orders can be defined based on the billing/shipping address in the order, the total or average amount or quantity of the orders, or the total number of orders. You can also set a date range for when this occurred, and the order status of the orders that match these conditions. Available only for customers who are logged in. Conditions that are set for shoppers who are not logged in stop working when they log in.

## Creating a Customer Segment

Creating a customer segment is similar to building a **cart price rule**, except that the options include customer-specific attributes. The following example shows how to create a customer segment that targets Millennials.



*Customer Segments*

### Process Overview:

- Step 1: **Enable Customer Segments**
- Step 2: **Complete the General Setup**
- Step 3: **Describe the Conditions**
- Step 4: **Generate the List of Matched Customers**

### Step 1: Enable Customer Segments

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Customers**, tap **Customer Configuration**.
3. Expand ☑ the **Customer Segments** section.
4. Verify that **Enable Customer Segment Functionality** is set to “Yes.”

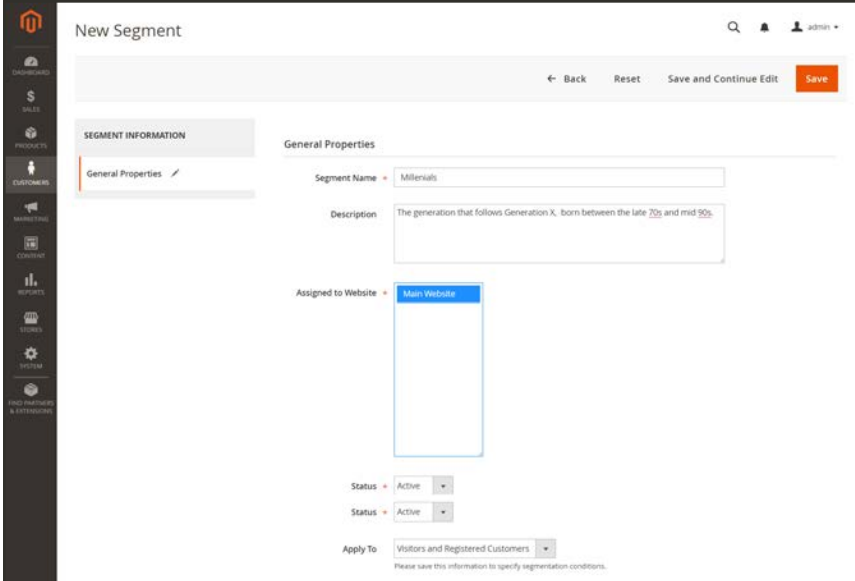


*Customer Segments*

5. When complete, tap **Save Config.**

## Step 2: Complete the General Setup

1. On the Admin sidebar, tap **Customers**. Then, choose **Segments**.
2. In the upper-right corner, tap **Add Segment**. Then, do the following:



The screenshot shows the 'New Segment' form in the Magento Admin interface. The form is titled 'New Segment' and has a sidebar on the left with navigation links. The main content area is divided into 'SEGMENT INFORMATION' and 'General Properties'. The 'General Properties' section includes fields for 'Segment Name' (Millennials), 'Description' (The generation that follows Generation X, born between the late 70s and mid 90s), 'Assigned to Website' (Main Website), 'Status' (Active), and 'Apply To' (Visitors and Registered Customers). There are buttons for 'Back', 'Reset', 'Save and Continue Edit', and 'Save' at the top right.

*New Segment*

3. Complete the **General Properties** as follows:
  - a. Enter a **Segment Name** to identify the customer segment when working in the Admin.
  - b. Enter a brief **Description** that explains the purpose of the segment.
  - c. Set **Assigned to Website** to the website where the customer segment can be used.
  - d. To activate the customer segment, set **Status** to “Active.”
  - e. To identify the customers that this segment applies to, set the **Apply to** field to one of the following:
    - Visitors and Registered Customers
    - Registered Customers
    - Visitors
4. When complete, tap **Save and Continue Edit**. Additional options become available in the Segment Information panel.

The screenshot shows the 'Millenials' customer segment configuration page. The left sidebar contains navigation links: Dashboard, Sales, Products, Customers, Marketing, Content, Reports, Stores, System, and Tools. The main content area has a top bar with 'Back', 'Delete', 'Reset', 'Refresh Segment Data', 'Save and Continue Edit', and a 'Save' button. Below this is a yellow confirmation message: 'You saved the segment.' The 'SEGMENT INFORMATION' section is active, showing 'General Properties' with fields for 'Segment Name' (Millenials), 'Description' (The generation that follows Generation X, and born between the late 70s and mid 90s.), and 'Assigned to Website' (Main Website). The 'Status' is set to 'Active' and 'Apply To' is set to 'Visitors and Registered Customers'.


*Segment Information*

### Step 3: Describe the Conditions

1. In the panel on the left, choose **Conditions**. The condition begins, “If ALL of these conditions are TRUE:”

The screenshot shows the 'Conditions' panel. It displays the text 'If ALL of these conditions are TRUE :'. Below this text is a list of conditions, with the first one being 'Date Of Birth' (indicated by a green plus icon). At the bottom of the panel, there is a note: '\* applicable to visitors and registered customers'.

*Conditions*

2. To create a condition that targets the Millennium Generation, do the following:
  - a. Tap **Add** (  ) to display the list of conditions. Then, in the list under Customer, choose **Date Of Birth**.
  - b. In the condition after “Customer Date of Birth,” click the **is** link. Then, choose “equals or greater than.”

**Conditions**

If **ALL** of these conditions are **TRUE** :

Customer Date Of Birth equals or greater than 2015-08-29 14:37:16

\* applicable to visitors and registered customers

*Equals or Greater Than*

- c. Click the default date value, and replace with the following: “1977-01-01”. Then, click the green checkmark (✓) to save the setting.

**Conditions**

If **ALL** of these conditions are **TRUE** :

Customer Date of Birth is 1977-01-01

\* applicable to visitors and registered customers

*Condition Line 1*

- d. On the next line, click **Add** (⊕). Then, in the list under Customers, again select **Date of Birth**.
- e. Click the **is** link, and select “equals or less than.”
- f. Replace the inserted date with the following: “1994-12-31”. Then, click the green checkmark (✓) to save the setting.

**Conditions**

If **ALL** of these conditions are **TRUE** :

Customer Date Of Birth equals or greater than 1977-01-01

Customer Date Of Birth equals or less than 1994-12-31

\* applicable to visitors and registered customers

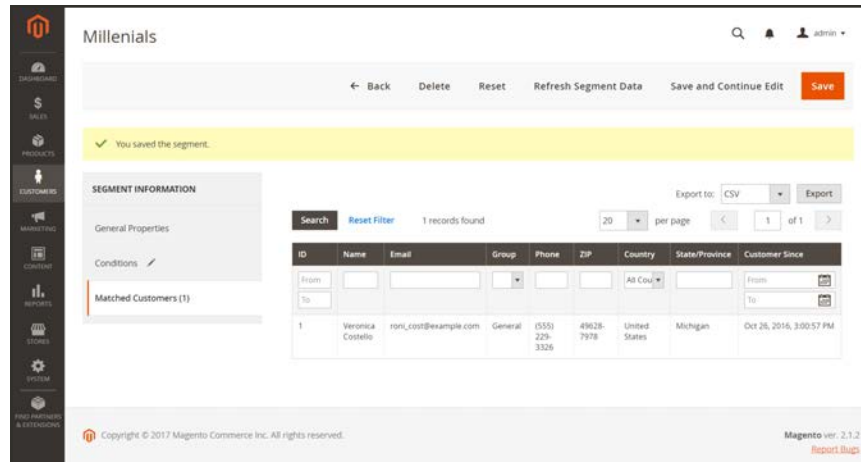
*Condition for Millennium Generation*

3. Tap **Save and Continue Edit.**



## Step 4: Generate the List of Matched Customers

1. In the panel on the left, select **Matched Customers** to display all customers who match the condition.



The screenshot shows the Magento Customer Segments interface for a segment named "Millenials". The left sidebar contains navigation links for Overview, Sales, Products, Customers, Marketing, Content, Reports, Stores, System, and Advanced Settings. The main content area has a top bar with "Back", "Delete", "Reset", "Refresh Segment Data", "Save and Continue Edit", and a "Save" button. A yellow banner indicates "You saved the segment." Below this, the "SEGMENT INFORMATION" panel shows "General Properties" and "Conditions". The "Matched Customers (1)" section displays a table with one record. The table has columns: ID, Name, Email, Group, Phone, ZIP, Country, State/Province, and Customer Since. The record shows ID 1, Name Veronica Costello, Email roni\_cost@example.com, Group General, Phone (555) 229-3329, ZIP 49628-7978, Country United States, State/Province Michigan, and Customer Since Oct 26, 2016, 3:00:57 PM. There are search and filter options above the table, and an "Export" button set to CSV.

ID	Name	Email	Group	Phone	ZIP	Country	State/Province	Customer Since
1	Veronica Costello	roni_cost@example.com	General	(555) 229-3329	49628-7978	United States	Michigan	Oct 26, 2016, 3:00:57 PM

*Matched Customers(1)*

2. When complete, tap **Save**.

The customer segment can now be used for targeting promotions, content, and mailings.

## Field Descriptions

FIELD	DESCRIPTION						
Segment Name	A name that identifies the segment for internal reference.						
Description	A brief description that explains the purpose of the segment for internal reference.						
Assigned to Website	The single website where the segment can be used.						
Status	Activates and deactivates the segment. Any associated price rules and banners are deactivated when the segment is disabled. Options include: Active / Inactive.						
Apply to	<p>Defines the customer types to which the segment is applied. The selection influences the set of conditions available for creating the segment. The setting cannot be changed after the segment is saved. Options include:</p> <table> <tr> <td>Visitors and Registered Customers</td><td>Includes all shoppers, regardless of whether they are logged in to an account.</td></tr> <tr> <td>Registered Customers</td><td>Includes only shoppers who are logged in to an account</td></tr> <tr> <td>Visitors</td><td>Includes only shoppers who are not logged in to an account.</td></tr> </table>	Visitors and Registered Customers	Includes all shoppers, regardless of whether they are logged in to an account.	Registered Customers	Includes only shoppers who are logged in to an account	Visitors	Includes only shoppers who are not logged in to an account.
Visitors and Registered Customers	Includes all shoppers, regardless of whether they are logged in to an account.						
Registered Customers	Includes only shoppers who are logged in to an account						
Visitors	Includes only shoppers who are not logged in to an account.						

## Customer Segments in Price Rules

A customer segment can be targeted by associating it with a **cart price rule** and **banner**.

Conditions

Apply the rule only if the following conditions are met (leave blank for all products).

If ALL of these conditions are TRUE:

If Customer Segment matches 1

Search Reset Filter 2 records found 20 per page 1 of 1

	ID	Segment	Status	Website
<input checked="" type="checkbox"/>	1	Millenials	Active	Main Website
<input type="checkbox"/>	2	My Customer Segment	Active	Main Website

*Targeted Customer Segment*

### To target a segment with a cart price rule:

1. On the Admin sidebar, tap **Marketing**. Then under **Promotions**, choose **Cart Price Rules**.
2. Do one of the following:
  - In the upper-right corner, tap **Add New Rule**.
  - Open an existing rule in edit mode.
3. Scroll down and expand the **Conditions** section. Then, complete the condition as follows:
  - a. Tap **Add** ( ) to display the list of conditions. Then, choose **Customer Segment**.

Apply the rule only if the following conditions are met (leave blank for all products).

If ALL of these conditions are TRUE:

Please choose a condition to add.

- Product attribute combination
- Products subselection
- Conditions combination
- Cart Attribute**
  - Subtotal
  - Total Items Quantity
  - Total Weight
  - Payment Method
  - Shipping Method
  - Shipping Postcode
  - Shipping Region
  - Shipping State/Province
  - Shipping Country
  - Customer Segment**

*Customer Segment*

- b. By default, the condition is set to find a matching condition. If needed, click the **matches** link, and change the operator to one of the following:

- does not match
- is one of
- is not one of

Apply the rule only if the following conditions are met (leave blank for all products).

If ALL of these conditions are TRUE :

If Customer Segment matches ...

matches  
does not match  
is one of  
is not one of

*Condition Operators*

- c.** To target a specific segment, click the (...) “more” link to display additional options. Then, click the **Chooser** (📄) to display the list of customer segments.

Apply the rule only if the following conditions are met (leave blank for all products).

If ALL of these conditions are TRUE :

If Customer Segment matches

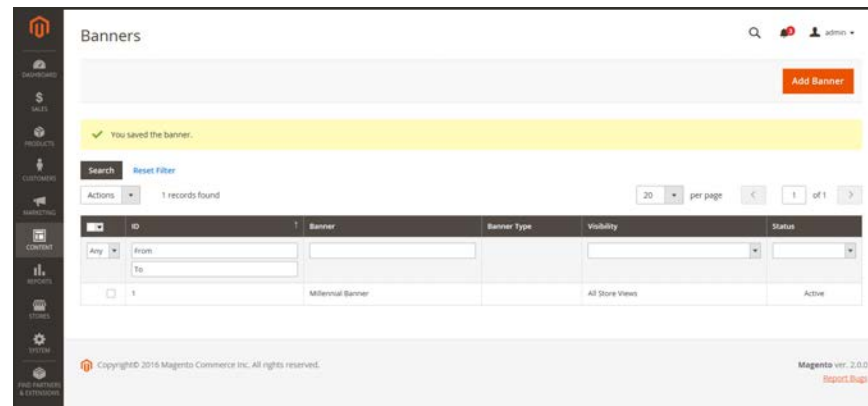
Chooser

*Chooser*

- d.** In the list, mark the checkbox of each segment that you want to target with the condition.
4. Click **Select** (✅) to place the selected customer segments into the condition.
  5. Complete the rest of the price rule as needed.
  6. When complete, tap **Save**.

## Customer Segments with Banners

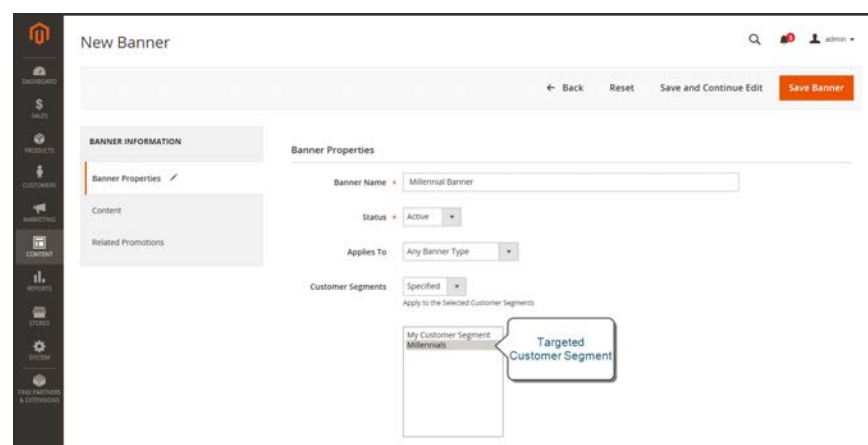
A **banner** can target a specific **customer segment**, and be incorporated into a **cart price rule**. Because customer segments are dynamic, the price rule can adjust to changes in customer activity.



*Banners*

### To associate a customer segment with a banner:

- On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Banners**.
  - In the upper-right corner, tap **Add Banner**.
  - Open an existing banner in edit mode.
- Set **Customer Segments** to “Specified.” Then in the list, select each customer segment that you want to target with the banner.



*Targeted Customer Segment*

- In the panel on the left, choose **Related Promotions**. Then, mark the checkbox of each related promotion.

Millennial Banner

← Back Delete Banner Reset Save and Continue Edit **Save Banner**

✓ You saved the banner.

**BANNER INFORMATION**

Banner Properties

Content

**Related Promotions**

Related Cart Price Rules

Search Reset Filter 1 records found 20 per page 1 of 1

ID	Rule	Start Date	End Date	Status
1	Buy 3 tee shirts and get the 4th free			Active

Related Catalog Price Rules

*Related Promotions*

4. Update the other banner settings as needed.
5. When complete, tap **Save Banner**.

## Customer Segment Report

The Customer Segment Report provides information about the number of customers in each segment.

Customer Segment Report

Search Reset Filter

Actions 2 records found 20 per page 1 of 1

ID	Segment	Status	Website	Customers
1	Millennials	Active	Main Website	0
2	My Customer Segment	Active	Main Website	1

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*Customer Segment Report*

You can drill down to a list of customers in the segment, and export the data.

Dashboard

Sales

Products

Customers

Marketing

Content

Reports

Stores

System

Partners & Extensions

Customer Segment Report 'My Customer Segment'

Store View: All Websites

Back

Refresh Segment Data

Export to: CSV

Export

Search

Reset Filter

1 records found

20 per page

1 of 1

ID	Name	Email	Group	Phone	ZIP	Country	State/Province	Customer Since
From						All Countries		From
To								To
1	Veronica Costello	roni_cost@examp1e.com	General	(555) 229-3326	49626-7978	United States	Michigan	Oct 26, 2016, 3:00:57 PM

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Magento ver. 2.1.2  
Report Bugs

Drill Down to Customer Data

# SALES



## Contents

In this section of the guide, you'll learn how to manage all aspects of the order process, including point of purchase support, order processing, payments, and fulfillment.

### Sales Menu

### Point of Purchase

#### Cart

##### Cart Configuration

###### Cart Sidebar

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###### Checkout Options

###### Checkout Totals Sort Order

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###### One Page Checkout

#### Orders

#### Orders

##### Orders Workspace

###### Order Actions

###### Order Search

###### Grid Layout

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###### Processing Orders

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###### Order Status Workflow

###### Custom Order Status

##### Scheduled Operations

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###### Scheduled Grid Updates

##### Order Archive

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##### Printing Multiple Invoices

#### Shipments

#### Credit Memos

##### Product Return Workflow

##### Issuing a Credit Memo

##### Printing Credit Memos

##### Store Credit

###### Store Credit Workflow

###### Applying Store Credit

###### Configuring Store Credit

##### Refunds to Customer Account

#### Returns

##### RMA Workflow

##### Configuring Returns

##### Returns Attribute

#### Billing Agreements

#### Transactions

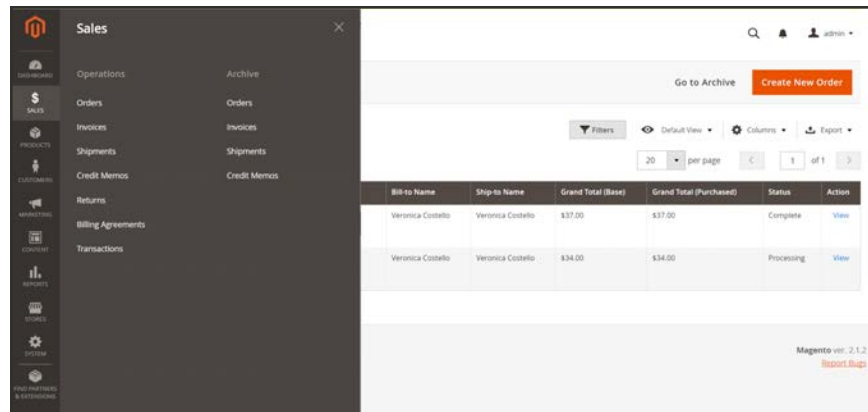
#### Payments

#### Shipping

## CHAPTER 54:

# Sales Menu

The Sales menu lists transactions according to where they are in the order workflow. You might think of each of option as a different stage in the lifetime of an order.

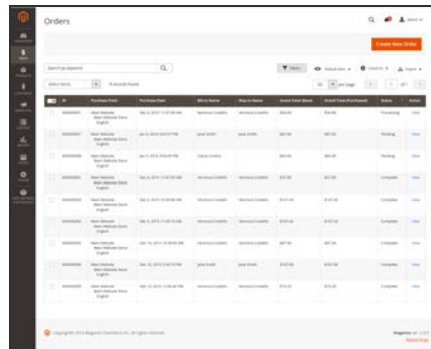


*Sales Menu*

## To display the Sales menu:

On the Admin sidebar, tap **Sales**.

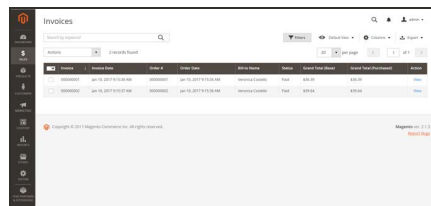
## Menu Options



Order ID	Order Status	Order Date	Order Total	Order Total (incl. Tax)
1000000001	Processing	Jan 12, 2015 11:47:39 AM	\$10.00	\$10.00
1000000002	Processing	Jan 12, 2015 11:47:39 AM	\$10.00	\$10.00
1000000003	Processing	Jan 12, 2015 11:47:39 AM	\$10.00	\$10.00
1000000004	Processing	Jan 12, 2015 11:47:39 AM	\$10.00	\$10.00
1000000005	Processing	Jan 12, 2015 11:47:39 AM	\$10.00	\$10.00
1000000006	Processing	Jan 12, 2015 11:47:39 AM	\$10.00	\$10.00
1000000007	Processing	Jan 12, 2015 11:47:39 AM	\$10.00	\$10.00
1000000008	Processing	Jan 12, 2015 11:47:39 AM	\$10.00	\$10.00
1000000009	Processing	Jan 12, 2015 11:47:39 AM	\$10.00	\$10.00
1000000010	Processing	Jan 12, 2015 11:47:39 AM	\$10.00	\$10.00

## Orders

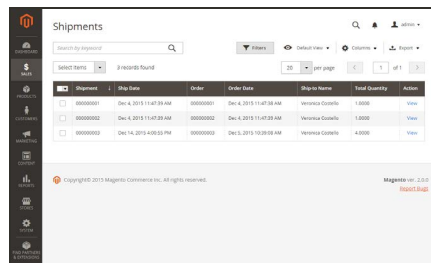
When an order is placed, a sales order is created as a temporary record of the transaction. Payment has not been processed, and the order can still be canceled.



Invoice ID	Invoice Date	Invoice Total	Invoice Status	Invoice Total (incl. Tax)	Invoice Total (incl. Tax)
1000000001	Jan 12, 2015 11:47:39 AM	\$10.00	PAID	\$10.00	\$10.00
1000000002	Jan 12, 2015 11:47:39 AM	\$10.00	PAID	\$10.00	\$10.00

## Invoices

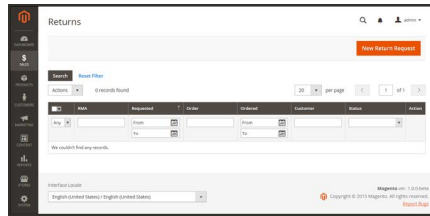
An invoice is a record of the receipt of payment for an order. Multiple invoices can be created for a single order, each with as many, or as few of the purchased products that you specify. Depending on the payment action, payment can be automatically captured when the invoice is generated.



Shipment ID	Ship Date	Order ID	Order Date	Ship to Name	Total Quantity	Action
1000000001	Jan 4, 2015 11:47:39 AM	1000000001	Jan 4, 2015 11:47:39 AM	Veronica Costello	1.0000	View
1000000002	Jan 4, 2015 11:47:39 AM	1000000002	Jan 4, 2015 11:47:39 AM	Veronica Costello	1.0000	View
1000000003	Jan 14, 2015 4:05:55 PM	1000000003	Jan 14, 2015 4:05:55 PM	Veronica Costello	4.0000	View

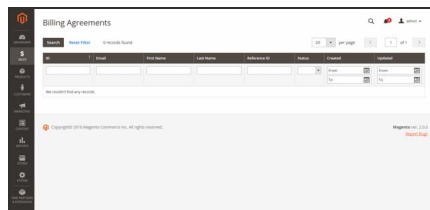
## Shipments

A shipment is a record of the products in an order that have been shipped. As with invoices, multiple shipments can be associated with a single order, until all of the products in the order are shipped.



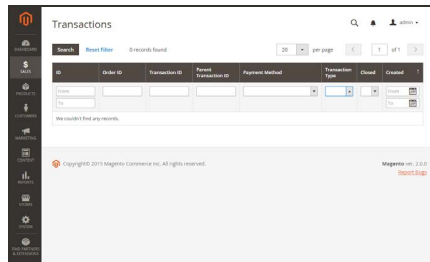
## Returns

A returned merchandise authorization (RMA) can be granted to customers who request to return an item for replacement or refund. RMAs can be issued for Simple, Grouped, Configurable, and Bundle product types. However, RMAs are not available for virtual and downloadable products, or gift cards.



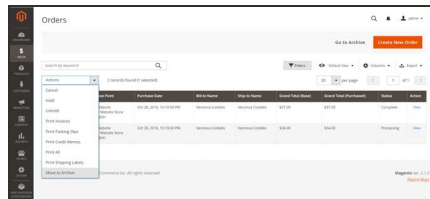
## Billing Agreements

A billing agreement is similar to a purchase order, except that it isn't limited to a single purchase. During checkout, the customer chooses Billing Agreement as the payment method. A billing agreement streamlines the checkout process because the customer doesn't have to enter payment information for each purchase.



## Transactions

The Transactions page lists all payment activity that has taken place between your store and all payment systems, and provides access to more detailed information.



## Archive

Archiving orders and other sales documents on a regular basis improves performance and keeps your workspace free of unnecessary information.



# Point of Purchase

## Contents

In this section of the guide, you'll learn how to configure the cart and checkout options, and offer assistance to your customers.

### Cart

- Cart Configuration

- Cart Sidebar

- Redirect to Cart

- Quote Lifetime

- Minimum Order Amount

- Allow Reorders

- Order by SKU

- Cart Thumbnails

- Gift Options

  - Gift Wrap

  - Gift Options Tax

- Persistent Cart

  - Persistent Cart Workflow

  - Configuring a Persistent Cart

### Shopping Assistance

- Managing a Shopping Cart

  - Creating a Customer Account

  - Updating a Customer Account

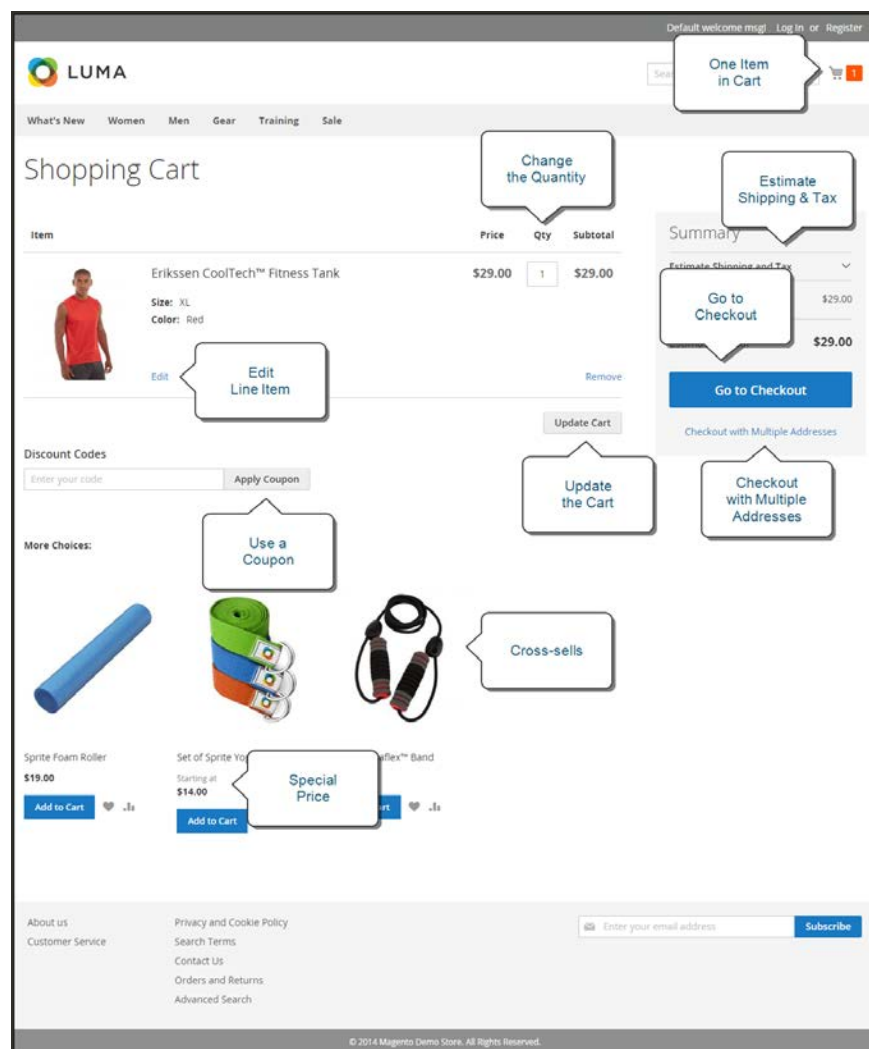
  - Creating an Order

  - Updating an Order

## CHAPTER 55:

# Shopping Cart

The cart is positioned at the end of the path to purchase, at the intersection of “Buy” and “Abandon,” and is perhaps, the most important page in the store. The cart is where the order total is calculated, along with discount coupons and estimated shipping and tax. It’s a great place to show your trust badges and seals, and an ideal opportunity to offer one last item. You can choose the items to be offered as a cross-sell impulse purchase whenever a specific item appears in the cart.



*Shopping Cart*



## Cart Configuration

The cart configuration determines the when the customer is redirected to the cart page, and which images are used for product thumbnails. You can require an order to reach a minimum amount before the checkout process begins, specify the number of days quoted prices remain valid, and specify the order of items in the Totals section.

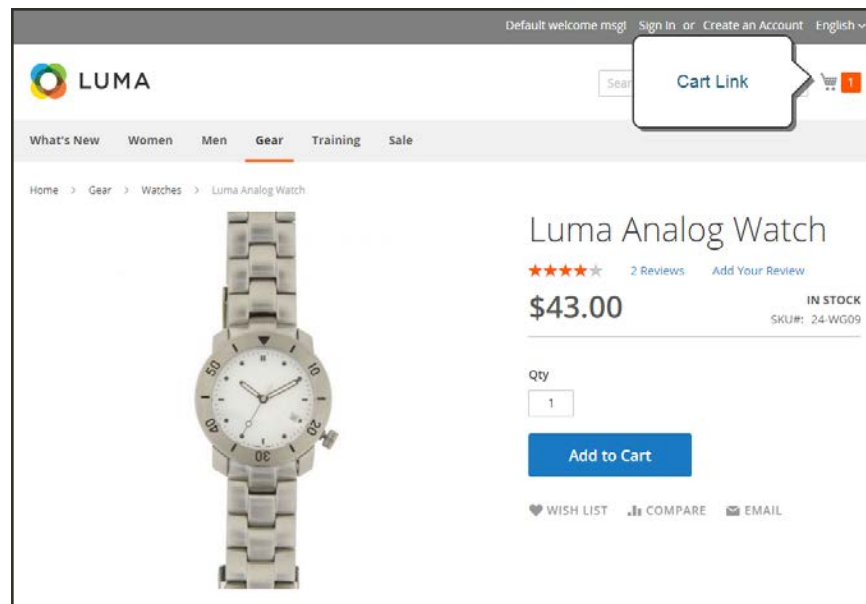
- [My Cart Link](#)
- [Cart Sidebar](#)
- [Redirect to Cart](#)
- [Quote Lifetime](#)
- [Minimum Order Amount](#)
- [Cart Thumbnails](#)

### See also:

[Checkout Configuration](#)

## My Cart Link

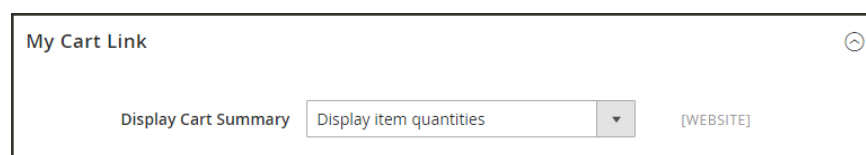
The cart link in the upper-right corner of the header gives a quick summary of the contents of the cart. The link can be configured to display the number of different products (or SKUs) in the cart, or the total quantity of all items. If the **Shopping Cart Sidebar** is enabled, you can click the link to display more detail.



*Cart Link*

### To configure the cart link:

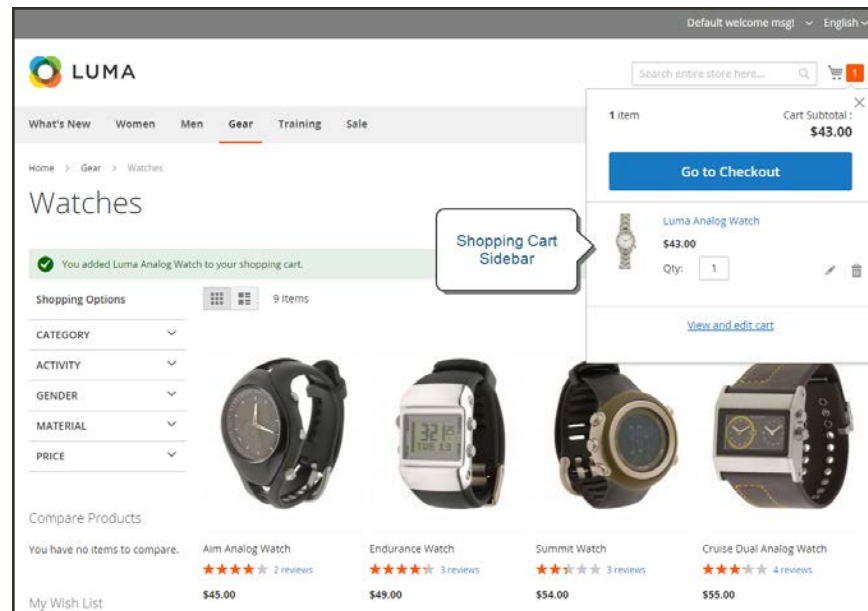
1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Checkout**.
3. Expand ☏ the **My Cart Link** section.
4. Set **Display Cart Summary** to one of the following:
  - Display item quantities
  - Display number of items (different products) in cart.
5. When complete, tap **Save Config**.



*My Cart Link*

## Cart Sidebar

The Cart Sidebar is often called the “mini cart,” and displays a summary of the items in the cart. It is enabled by default, and appears when you click the number of items in the Cart Link.



*Shopping Cart Sidebar*

### To configure the mini cart:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Checkout**.
3. Expand the **Shopping Cart Sidebar** section. Then, do the following:

Shopping Cart Sidebar

Display Shopping Cart Sidebar

Yes

[STORE VIEW]

Maximum Display Recently Added Item(s)

5

[STORE VIEW]

*Shopping Cart Sidebar*

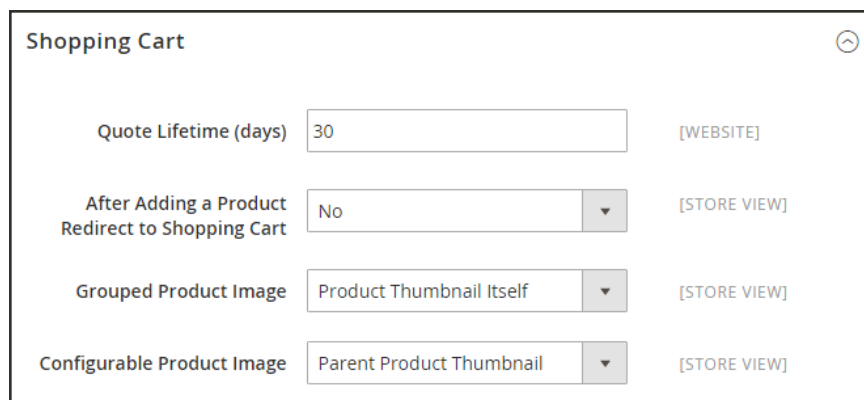
- a. Set **Display Shopping Cart Sidebar** to your preference.
  - b. In the **Maximum Display Recently Added Item(s)** field, enter the maximum number of recently added items that you want to appear in the mini cart.
4. When complete, tap **Save Config.**

## Redirect to Cart

The shopping cart page can be configured to appear whenever an item is added to the cart, or only when customers choose to go to the page. The basic information about the items currently in the cart is always available in the **mini cart**. The decision is a matter of balancing the benefits letting customers continue shopping, with the benefit of encouraging customers to proceed to checkout. It might be simply a matter of personal preference. However, if you want back it up with numbers, you can run an A/B test to see which approach produces a higher conversion rate.

### To configure when the cart appears:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Checkout**.
3. Expand the **Shopping Cart** section.
4. Set **After Adding a Product Redirect to Shopping Cart** to your preference.
5. Tap **Save Config**.



The screenshot shows the 'Shopping Cart' configuration panel. It contains four settings:

Setting	Value	Scope
Quote Lifetime (days)	30	[WEBSITE]
After Adding a Product Redirect to Shopping Cart	No	[STORE VIEW]
Grouped Product Image	Product Thumbnail Itself	[STORE VIEW]
Configurable Product Image	Parent Product Thumbnail	[STORE VIEW]

*Redirect to Cart*

# Quote Lifetime

You can determine how long a price is valid by setting the cart quote lifetime in the configuration. For example, if a shopper leaves a cart unattended after several days, the quotes price for some items might no longer be the same. By default, the quote lifetime is set to thirty days.

## To configure the quote lifetime:

- 1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
- 2. In the panel on the left under **Sales**, choose **Checkout**.
- 3. Expand ☑ the **Shopping Cart** section.
- 4. In the **Quote Lifetime (days)** field, enter the number of days that a quoted price remains valid.
- 5. When complete, tap **Save Config**.

Shopping Cart

Quote Lifetime (days)

30

[WEBSITE]

After Adding a Product  
Redirect to Shopping Cart

No

▼

[STORE VIEW]

Grouped Product Image

Product Thumbnail Itself

▼

[STORE VIEW]

Configurable Product Image

Parent Product Thumbnail

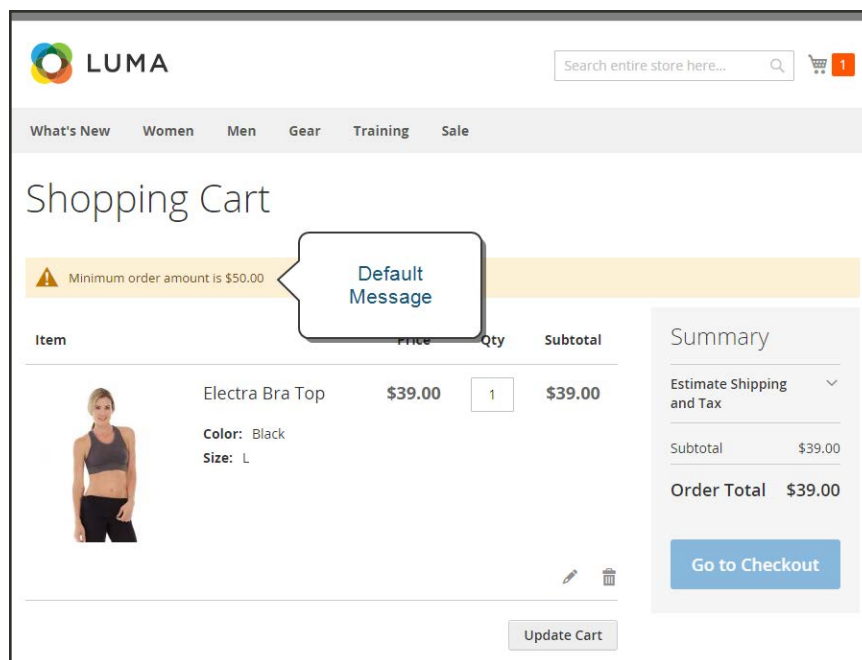
▼

[STORE VIEW]

Shopping Cart

## Minimum Order Amount

The configuration allows you to specify a minimum amount, after discounts are applied, that order subtotals are required to meet. Orders shipped to multiple address can be required to meet the minimum order amount per address. The Checkout button becomes available only after the minimum order amount is reached.



*Minimum Order Message in Cart*

### To configure a minimum order amount:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Sales**.
3. Expand the **Minimum Order Amount** section. Then, do the following:

Minimum Order Amount

Enable

No

[WEBSITE]

Minimum Amount

Subtotal after discount

[WEBSITE]

Include Tax to Amount

Yes

[WEBSITE]

Description Message

[STORE VIEW]

This message will be shown in the shopping cart when the subtotal (after discount) is lower than the minimum allowed amount.

Error to Show in Shopping Cart

[STORE VIEW]

Validate Each Address Separately in Multi-address Checkout

No

[WEBSITE]

Multi-address Description Message

[STORE VIEW]

We'll use the default description above if you leave this empty.

Multi-address Error to Show in Shopping Cart

[STORE VIEW]

We'll use the default error above if you leave this empty.

### Minimum Order Amount

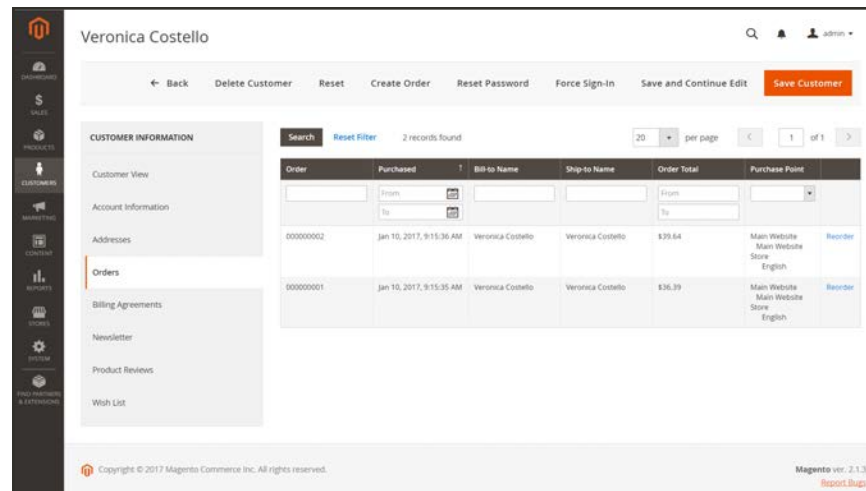
- a. To require a minimum order amount, set **Enable** to “Yes.”
- b. Enter the **Minimum Amount** that is required for the subtotal, after discounts are applied.
- c. Set **Include Tax to Amount** to one of the following:
  - Yes      Requires the subtotal to meet the minimum amount with tax included.
  - No        Requires the subtotal to meet the minimum amount without tax.
- d. To change the default message that appears at the top of the cart when the subtotal doesn’t meet the minimum amount, enter the text in the **Description Message** box. Leave the box blank to use the default message.
- e. To change the default error message, enter the text in the **Error to Show in Shopping Cart** box.

- f. To require that each address in a multi-address order meet the minimum order amount, set **Validate Each Address Separately in Multi-address Checkout** to “Yes.”
  - g. To change the default message at the top of the cart for orders that are to be shipped to multiple addresses, but do not meet the minimum, enter the text in the **Multi-address Description Message** box.
  - h. To change the default error message for orders that are to be shipped to multiple addresses, but do not meet the minimum, enter the text in the **Multi-address Error to Show in Shopping Cart** box.
4. When complete, tap **Save Config.**




## Allow Reorders

When enabled, reorders can be made directly from the customer account or from the original order in the Admin. Reorders are enabled by default.



*Customer Reorder Link in Admin*

### To configure customer reorders:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Sales**.
3. Expand  the **Reorder** section.

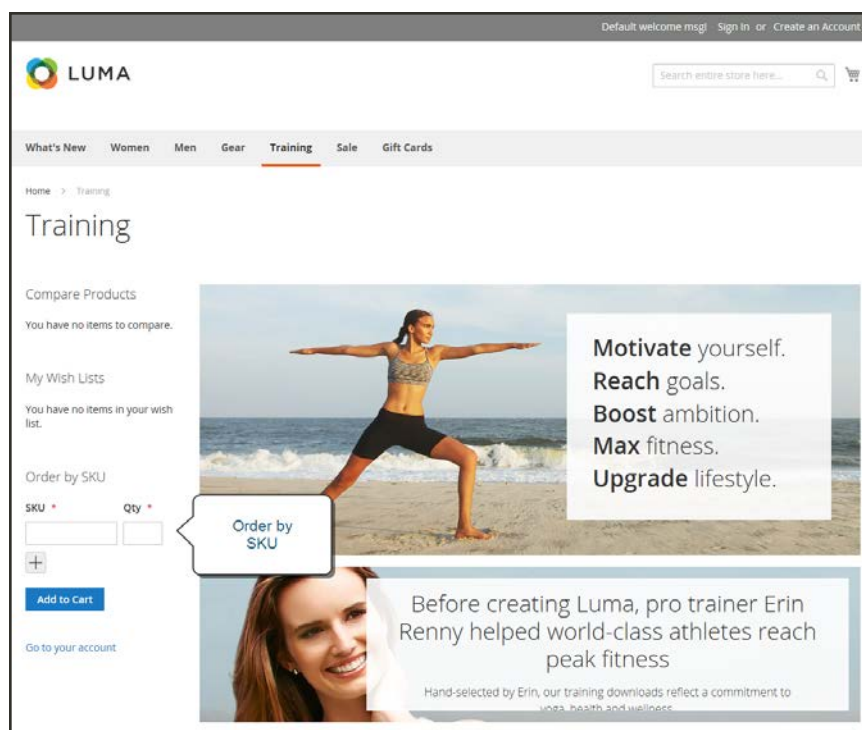


*Reorder*

4. Set **Allow Reorder** to your preference.

## Order by SKU

Order by SKU is a widget that can be displayed in the store as a convenience for all shoppers, or made available to only those in specific customer groups. Shoppers can either enter the SKU and quantity information directly into the Order by SKU block, or upload a csv file from their customer account. Regardless of the configuration, Order by SKU is always available to store administrators.




*Order by SKU in the Storefront*

### To order by SKU from the storefront:


1. In the Order by SKU block, enter the **SKU** and **Qty** of the item to be ordered.
2. To add another item, click **Add Row**, and repeat the process.
3. When complete, tap **Add to Cart**.

### To order by SKU from a customer account:

1. From the storefront, log in to your customer account.
2. In the panel on the left, choose **Order by SKU**.
3. To add individual items, do the following:

- a. Enter the **SKU** and **Qty** of the item to be ordered.
  - b. To add another item, tap **Add Row** , and repeat for as many items as necessary.
- 4. To upload a CSV file of multiple items to be ordered, do the following:
  - a. Prepare a CSV file that includes columns for SKU and Qty.
  - b. Tap **Choose File**, and select the file to upload.
- 5. Tap **Add to Cart**.

**To configure Order by SKU:**

- 1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configure**.
- 2. In the panel on the left under **Sales**, choose **Sales**.
- 3. Expand  the **Order by SKU Settings** section.

Set **Enable Order by SKU on my Account in Storefront** to one of the following:

- |                                    |   |
|------------------------------------|---|
| Yes, for Everyone                  | The Order by SKU block is available in the store for every shopper.   |
| Yes, for Specified Customer Groups | Order by SKU is available only to members of a specific customer group, such as “Wholesale.”                                  |
| No                                 | The Order by SKU block does not appear in the storefront, and the Order by SKU page is not available in the customer account. |



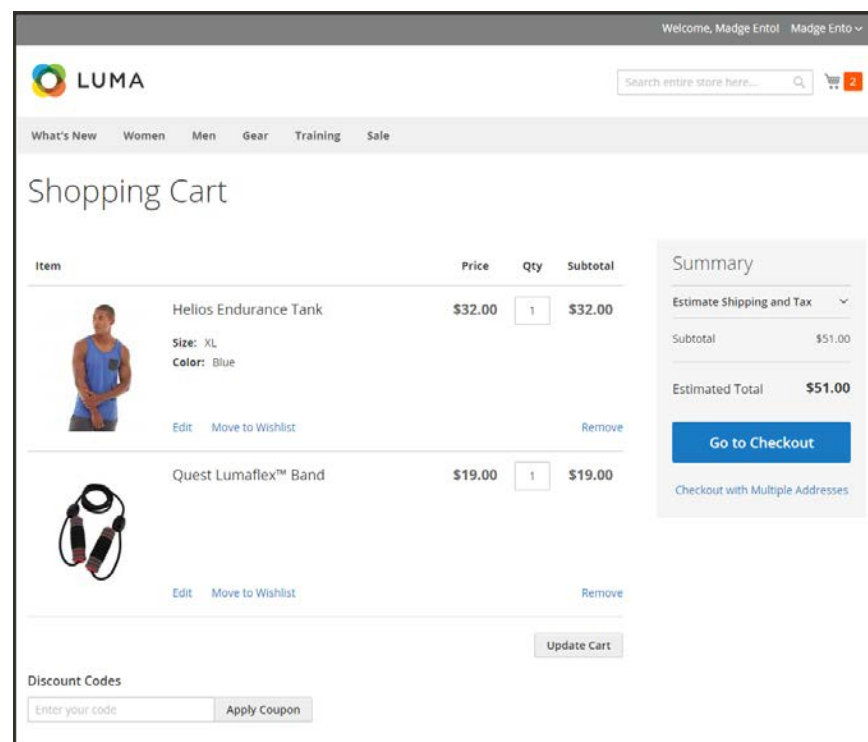
*Order by SKU Settings*

When complete, tap **Save Config**.

## Cart Thumbnails

The thumbnail images in the cart give customers a quick overview of the items they are about to purchase. However, for products with multiple options, the image might not match the variation of the product that is in the cart. If the customer purchases an item in a specific color, ideally, the thumbnail in the cart should match.

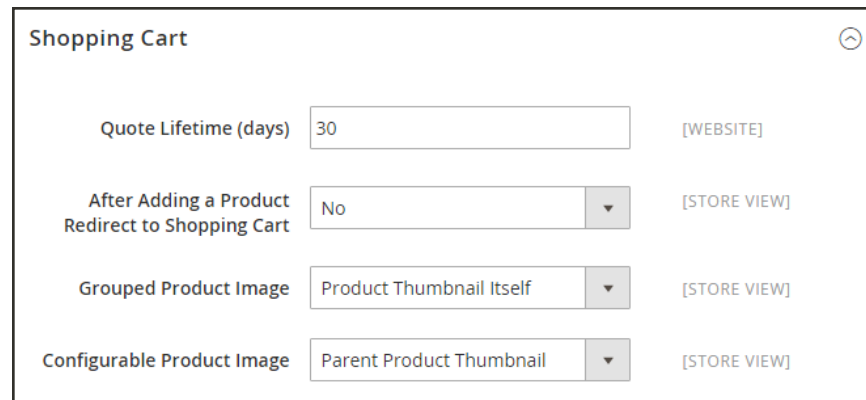
The thumbnail image for both grouped and configurable products can be set to display the image from either the “parent” product or from the product variation. The setting applies to all grouped or configurable products in the current store view.



*Thumbnail Images in Cart*

### To configure cart thumbnails:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Checkout**.
3. Expand ☑ the **Shopping Cart** section. Then, do the following:



The screenshot shows the 'Shopping Cart' configuration panel. It has a title bar with a close icon. Below the title, there are four rows of settings. Each row has a label, a value field, and a scope indicator. The first row is 'Quote Lifetime (days)' with a value of '30' and a scope of '[WEBSITE]'. The second row is 'After Adding a Product Redirect to Shopping Cart' with a value of 'No' and a scope of '[STORE VIEW]'. The third row is 'Grouped Product Image' with a value of 'Product Thumbnail Itself' and a scope of '[STORE VIEW]'. The fourth row is 'Configurable Product Image' with a value of 'Parent Product Thumbnail' and a scope of '[STORE VIEW]'. Each value field has a dropdown arrow on its right side.

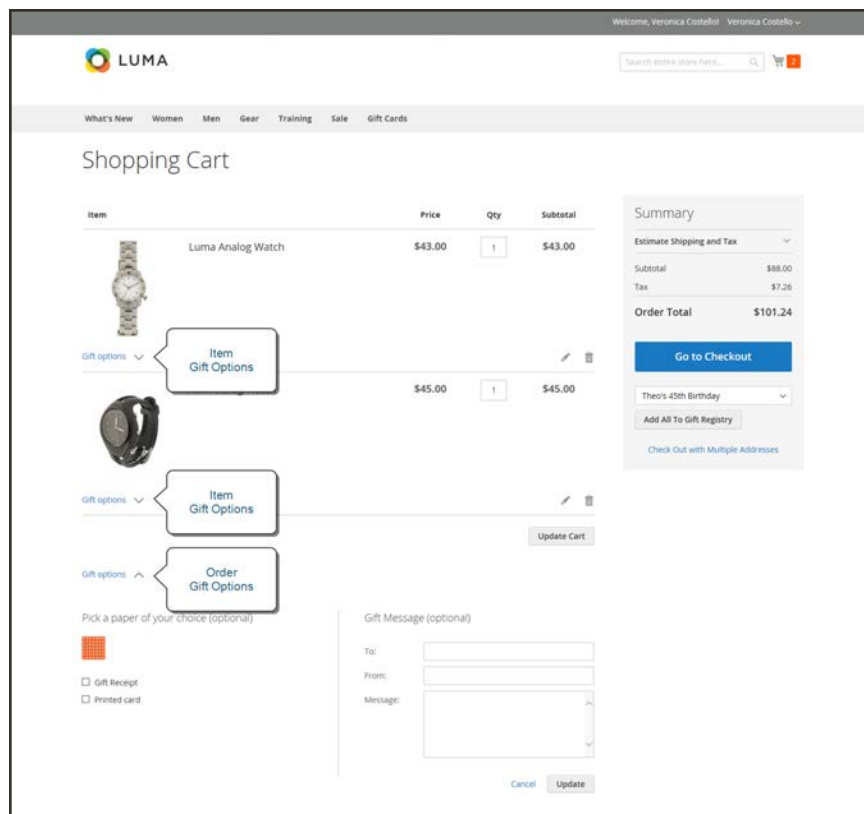
Setting	Value	Scope
Quote Lifetime (days)	30	[WEBSITE]
After Adding a Product Redirect to Shopping Cart	No	[STORE VIEW]
Grouped Product Image	Product Thumbnail Itself	[STORE VIEW]
Configurable Product Image	Parent Product Thumbnail	[STORE VIEW]

#### *Shopping Cart*

- a. Set **Grouped Product Image** to one of the following:
    - Product Thumbnail Itself
    - Parent Product Thumbnail
  - b. Set **Configurable Product Image** to one of the following:
    - Product Thumbnail Itself
    - Parent Product Thumbnail
4. When complete, tap **Save Config**.


## Gift Options

The selection of available gift options appears in the cart before the checkout process begins. The Gift Options configuration determines if customers can add a gift message or greeting card, and the gift wrapping that are available. Each item in the order can have separate gift wrapping and message. When applied to the entire order, a gift receipt and greeting card can be added, as well. The Gift Options configuration applies to the entire website, but can be overridden at the product level.



*Gift Options*

### To enable gift options:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Sales**.
3. Expand  the **Gift Options** section. Then, do the following:



The screenshot shows a configuration panel titled "Gift Options" with a close button in the top right corner. It contains two rows of settings. The first row is "Allow Gift Messages on Order Level" with a dropdown menu set to "No" and a checkbox labeled "Use system value" which is checked. The second row is "Allow Gift Messages for Order Items" with a dropdown menu set to "No" and a checkbox labeled "Use system value" which is also checked. Both dropdown menus have a small downward arrow on the right side.

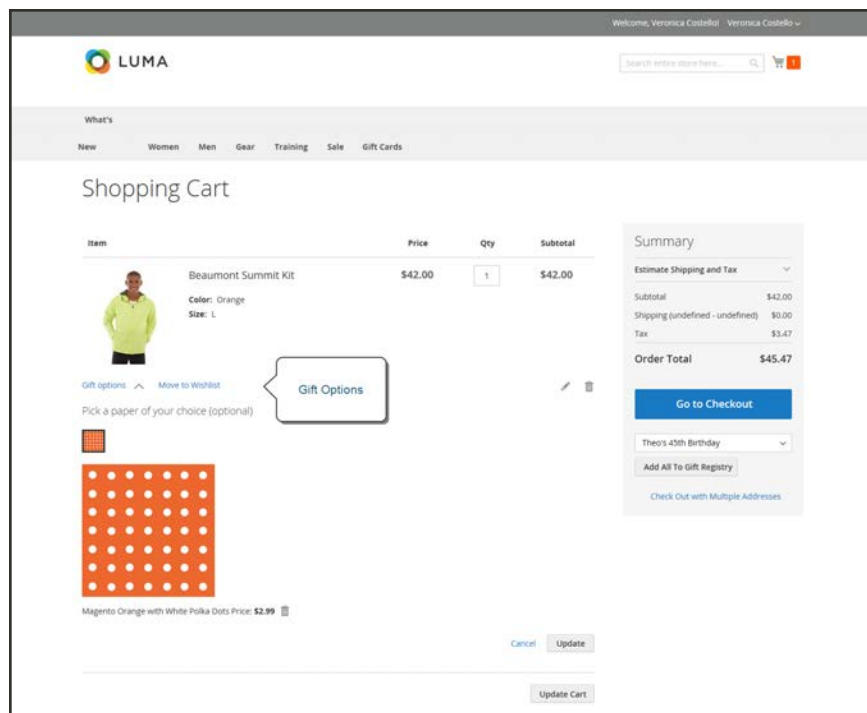
### *Gift Options*

- a. Set the **Gift Message** options according to your preference:
    - Allow Gift Messages on Order Level
    - Allow Gift Messages for Order Items
  - b. Set the **Gift Wrapping** options according to your preference:
    - Allow Gift Wrapping on Order Level
    - Allow Gift Wrapping for Order Items
  - c. To give customers the option to include a gift receipt with their orders, set **Allow Gift Receipt** to “Yes.”
  - d. To give customers the option to include a printed card with their orders, set **Allow Printed Card** to “Yes.” Then, enter the **Default Price for Printed Card**.
4. When complete, tap **Save Config**.

## Gift Wrap

Gift wrapping is available for any product that can be shipped, and can be offered for individual items or for the entire order. You can charge a separate price for each gift wrap design, and upload a thumbnail image of the design that appears as an option for the product in the cart. When the gift wrap thumbnail is clicked, a full-size image appears. During checkout review, the gift wrap charge appears with the other **checkout totals** in the Order Summary section.

The gift wrap image should be a swatch that shows the repeating pattern, and can also include a sample of the ribbon that is to be used. You can either scan the paper, or take a photograph of a wrapped package. The uploaded image can be GIF, JPG, or PNG image, and should be square. In the following example, the uploaded gift wrap image is 230 x 230 pixels.

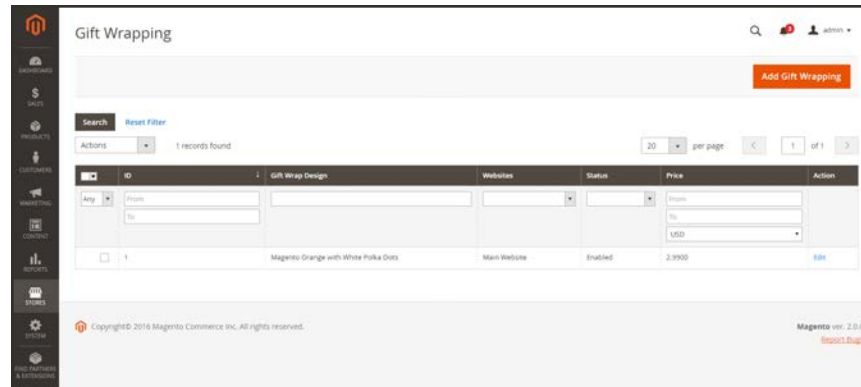


*Gift Options in Cart*



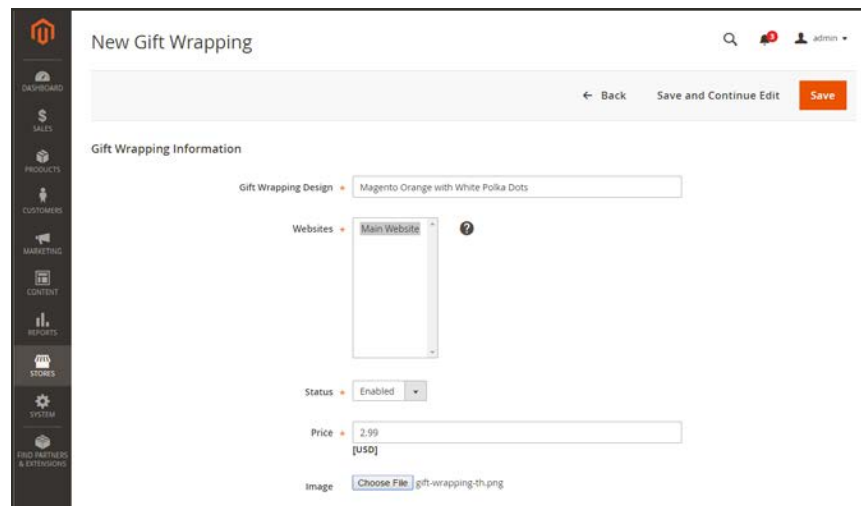
## To add a new gift wrap design:

1. On the Admin sidebar, tap **Stores**. Then under **Other Settings**, choose **Gift Wrapping**.



*Gift Wrapping*

2. In the upper-right corner, tap **Add Gift Wrapping**. Then, do the following:

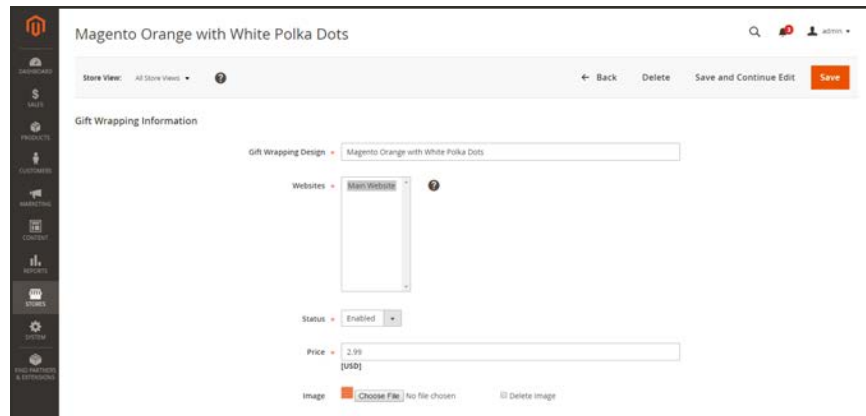


*New Gift Wrapping*

- a. Enter the name for the **Gift Wrapping Design** to appear during checkout.
  - b. Select the **Websites** where the gift wrap design will be available.
  - c. Set **Status** to “Enabled.”
  - d. Enter the **Price** of the gift wrap design.
  - e. To upload a thumbnail **Image** of the gift wrapping, tap **Choose File**. Then, select the file to upload from your directory. A thumbnail of the image appears in the Gift Wrapping Information after the record is saved.
3. When complete, tap **Save**.

### To edit a gift wrap design:

1. On the Admin sidebar, tap **Stores**. Then under **Other Settings**, choose **Gift Wrapping**.
2. Find the gift wrap record in the list. Then in the Action column, click **Edit**.



*Edit Gift Wrapping Information*

3. Make the necessary changes.
4. When complete, tap **Save**.

### To delete gift wrap designs:

#### Method 1: Delete Single Gift Wrap Design

1. Open the gift wrapping design in edit mode.
2. At the top of the workspace, tap **Delete**. Then when prompted, tap **OK** to confirm.

#### Method 2: Delete Multiple Gift Wrap Designs

1. In the Gift Wrapping grid, mark the checkbox of each gift wrap design that you want to delete.
2. Set the **Actions** control to “Delete.”
3. Tap **Submit**.

**Field Descriptions**

FIELD	SCOPE	DESCRIPTION
Gift Wrapping Design	Store View	The name of the gift wrap option that appears to customers during checkout. The name can be different for each store view.
Websites		Select the websites where the new gift wrap will be available.
Status	Global	Determines if gift wrapping is available. Options: Enabled / Disabled.
Price	Global	Specifies the price of the gift wrap option. This setting can be overridden by the gift wrap price set at the product level.
Image	Global	Uploads a thumbnail image of the gift wrap design that appears next to the gift wrap option.

# Gift Options Tax

Gift wrapping and printed gift card prices can be configured to include or exclude tax, or to display both options. You can also specify a tax class for these items, at either the global or website level.

## To configure gift options taxes:

- 1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
- 2. In the panel on the left, under **Sales**, choose **Tax**.
- 3. Expand ☑ the **Tax Classes** section. Then, set **Tax Class for Gift Options** to the applicable tax class.

Tax Classes

Tax Class for Shipping

None

[WEBSITE]

Default Tax Class for Product

Taxable Goods

[GLOBAL]

Default Tax Class for Customer

Retail Customer

[GLOBAL]

Tax Classes

- 4. Expand ☑ the **Orders, Invoices, Credit Memos Display Settings** section. Then, do the following:

Orders, Invoices, Credit Memos Display Settings

Display Prices

Excluding Tax

[STORE VIEW]

Display Subtotal

Excluding Tax

[STORE VIEW]

Display Shipping Amount

Excluding Tax

[STORE VIEW]

Include Tax In Order Total

No

[STORE VIEW]

Display Full Tax Summary

No

[STORE VIEW]

Display Zero Tax Subtotal

No

[STORE VIEW]

Orders, Invoices, Credit Memos Display Settings

- a.** Set **Display Gift Wrapping Prices** to one of the following:
    - Excluding Tax
    - Including Tax
    - Including and Excluding Tax
  - b.** Set **Display Printed Gift Card Prices** to one of the following:
    - Excluding Tax
    - Including Tax
    - Including and Excluding Tax
- 5.** When complete, tap **Save Config.**

## Persistent Cart

A persistent shopping cart keeps track of unpurchased items which are left in the cart, and saves the information for the customer's next visit. Customers who are “remembered” can have the contents of their shopping carts restored the next time they visit your store.

Using a persistent shopping cart can help reduce the number of abandoned shopping carts and increase sales. It is important to understand that the persistent shopping cart does not expose sensitive account information at any time. While the persistent shopping cart is use, both registered customers and guest shoppers are required to either log in to an existing account, or create a new account before going through checkout. For guest shoppers, a persistent shopping cart is the only way to retrieve information from a previous session.

To use the persistent shopping cart, the customer's browser must be set to allow cookies. During operation, the following cookies are used:



### Session Cookie

---

A short-term session cookie exists for the duration of a single visit to your site, and expires when the customer leaves, or after a set period of time.



### Persistent Cookie

---

A long-term persistent cookie continues in existence after the end of the session, and saves a record of the customers' shopping contents for future reference.

## Persistent Cart Workflow

When Persistent Shopping Cart is enabled, the workflow depends on the values of the “Enable Remember Me” and “Clear Persistence on Log Out” settings, the customer’s decision to select or clear the “Remember Me” checkbox, and when the persistent cookie is cleared.

The persistent cookie retains settings for the Shopping Cart, Wish List, Recently Ordered Items, Currently Compared Products, Comparison History, Recently Viewed Products, and Customer Group association. The persistent settings for all related entities are either cleared or retained according to the Persistent Shopping Cart setting.

When a persistent cookie is applied, a Not %Jane Smith%? link appears in the page header, to give the customer the ability to terminate the persistent session and start working as a guest, or log in as a different customer. The system retains a record of the shopping cart contents, even if the customer later uses different devices to shop in your store. For example, a customer can add an item to the shopping cart from a laptop, edit the cart contents from a desktop computer, add more items from a mobile device, and complete the checkout process from a tablet.

There is a separate independent persistent cookie for each browser. If the customer uses multiple browsers while visiting your store during a single, persistent session, any changes made in one browser will be reflected in any other browser when the page is refreshed. While the persistent shopping cart is enabled, your store creates and maintains a separate persistent cookie for each browser that is used by a customer to log in or create an account.

### An Open Session on a Shared Computer

Jane is finishing up her holiday shopping with a persistent session, and adds a present for John to her cart, as well as something for her mother. Then she goes to the kitchen for some milk and cookies.

John sits down at the computer to do some quick shopping while Jane’s in the kitchen. Without noticing the “Not %Jane%” link at the top of the page, he finds a nice present for Jane and adds it to the cart. When he goes to checkout and logs in as himself, both the items in Jane’s cart are added to his cart. John’s in such a hurry that he doesn’t notice the additional item during Order Review, and submits the order. Jane’s cart is now empty, and John bought presents for both Jane and her mother.

Jane brings John some milk and cookies, and asks, “What’s up?” He says, “Oh, nothing.”

## Remember Me

Customers can click the “Remember Me” checkbox on the Login page to save the contents of the their shopping carts.



**Yes** A persistent cookie is created, and the contents of the shopping cart is saved for the customer's next logged-in session.



**No** If “Remember Me” is not selected or is cleared, a persistent cookie is not created, and the cart information is not saved for the customer's next logged-in session.

## Continue Persistence on Logout (No)



**No** When the customer logs in, the persistent cookie is invoked, in addition to the session cookie which is already in use.



**No** When the customer logs out, the session cookie is deleted, but the persistent cookie remains in effect. The next time the customer logs in, the cart items are restored, or added to any new items that have been placed in the cart.



**No** If the customer does not log out, but the session cookie expires, the persistent cookie remains in effect.

## Clear Persistence on Logout (Yes)



**Yes** When the customer logs in, the persistent cookie is invoked, in addition to the session cookie which is already in use.



**Yes** When the customer logs out, both cookies are deleted.



**Yes** If the customer does not log out, but the session cookie expires, the persistent cookie remains in effect.



## Persistent Cart Settings and Effects

SETTINGS	EFFECT
Enable Remember Me = "No" Clear Persistence on Log Out = any value	The Remember Me checkbox is not available on the login and registration page. The persistent cookie is not used.
Enable Remember Me = "Yes" Clear Persistence on Log Out = any value Remember Me (not selected)	The session cookie is applied as usual; the persistent cookie is not used.
Enable Remember Me = "Yes" Clear Persistence on Log Out = "Yes" Remember Me = "Yes"	When a customer logs in, both cookies are applied. When a customer logs out, both cookies are deleted. If a customer does not log in, but the session cookie expires, the persistent cookie is still used. Apart from logging out, the persistent cookie is deleted when its lifetime runs out or when the customer clicks the Not %Jane Smith% link.
Enable Remember Me = "Yes" Clear Persistence on Log Out = "No" Remember Me = "Yes"	When a customer logs in, both cookies are applied. When a customer logs out, the session cookie is deleted, the persistent session continues. The persistent cookie is deleted when its lifetime runs out or when the customer clicks the Not %Jane Smith% link.

## Configuring a Persistent Cart

During the setup of a persistent shopping cart, you can specify the lifetime of the cookies, and which options you want to make available for various customer activities.

If the session cookie expires while the customer is logged in, the persistent cookie remains active.

### To configure a persistent cart:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Customers**, choose **Persistent Shopping Cart**.
3. If necessary, expand ☺ the **General Options** section.
4. To enable the persistent shopping cart and display additional options, set **Enable Persistence** to “Yes.” Then, do the following:

General Options	
Enable Persistence <small>[website]</small>	Yes <input type="checkbox"/> Use system value
Persistence Lifetime (seconds) <small>[website]</small>	31536000 <input checked="" type="checkbox"/> Use system value
Enable "Remember Me" <small>[website]</small>	Yes <input checked="" type="checkbox"/> Use system value
"Remember Me" Default Value <small>[website]</small>	Yes <input checked="" type="checkbox"/> Use system value
Clear Persistence on Sign Out <small>[website]</small>	Yes <input checked="" type="checkbox"/> Use system value
Persist Shopping Cart <small>[website]</small>	Yes <input checked="" type="checkbox"/> Use system value

### General Options

- a. In the **Persistence Lifetime (seconds)** field, enter the length of time, in seconds, that you want the persistent cookie to last. The default value of 31,536,000 seconds is equal to one year, and is the maximum time allowed.
- b. Set **Enable “Remember Me”** to one of the following:
 

Yes	Displays the “Remember Me” checkbox on the Login page of your store, so customers can choose to save their shopping cart information.
No	Persistence can still be enabled, but customers are not given the option to choose if they want to save their information.
- c. To preselect the “Remember Me” checkbox, set **Remember Me Default Value** to “Yes.”
- d. Set **Clear Persistence on Log Out** to one of the following:

Yes	Clears persistent settings for all entities when a registered customer logs out. Entities with persistent settings include: Shopping Cart, Wish List, Recently Ordered Items, Currently Compared Products, Comparison History, Recently Viewed Products, and Customer Group association.
No	Retains persistent settings for all entities when a registered customer logs out.

If the session cookie expires while the customer is still logged in, the persistent cookie remains in use.

**e.** Set **Persist Shopping Cart** to one of the following:

Yes	If the session cookie expires, the persistent cookie is preserved. If a customer later logs in, the shopping cart is restored.
No	The shopping cart is not preserved for guests after the session cookie expires.

**5.** When complete, tap **Save Config.**



## CHAPTER 56:

# Shopping Assistance

Customers sometimes need assistance to complete a purchase. Some customers like to shop online, but would rather the order by phone. You can offer immediate assistance both guests and customers who have registered for an account with your store.

- [Creating Customer Accounts](#)
- [Creating Orders](#)

## Creating Customer Accounts

Customers usually create their own accounts from your store. However, you can also create customer accounts directly from the Admin, which is useful when customers order by phone.

The screenshot shows the 'New Customer' form in the Magento Admin interface. The form is titled 'New Customer' and has a sidebar on the left with navigation links: Dashboard, Sales, Products, Customers, Marketing, Content, Reports, Stores, and System. The 'Customers' link is highlighted. The main form area is divided into two sections: 'CUSTOMER INFORMATION' and 'Account Information'. The 'Account Information' section is active and contains the following fields: 'Associate to Website' (dropdown menu set to 'Main Website'), 'Group' (dropdown menu set to 'General'), a checkbox for 'Disable Automatic Group Change Based on VAT ID', 'Prefix' (text input), 'First Name' (text input), 'Middle Name/Initial' (text input), 'Last Name' (text input), 'Suffix' (text input), 'Email' (text input), 'Date of Birth' (text input), 'Tax/VAT Number' (text input), 'Gender' (dropdown menu set to 'Male'), and 'Send Welcome Email From' (dropdown menu set to 'Default Store View'). At the top right of the form, there are buttons for 'Back', 'Reset', 'Save and Continue Edit', and 'Save Customer'.

*New Customer Account Information*

### Step 1: Create a New Customer Account

1. On the Admin sidebar, tap **Customers**. Then, choose **All Customers**.
2. Tap **Add New Customer**.
3. In the **Account Information** section, do the following:

*Customer Information*

- a. To associate the customer with a specific store view, set **Associate to Website** to the view.
  - b. Assign the customer to a **Customer Group**.
  - c. If using VAT ID Validation, and want to **Disable Automatic Group Change Based on VAT ID**, mark the checkbox.
4. Complete the following required fields:
    - First Name
    - Last Name
    - Email
  5. Complete the optional fields as needed:
    - Prefix
    - Middle Name/Initial
    - Suffix
    - Date Of Birth
    - Tax/VAT Number
    - Gender
  6. Set **Send Welcome Email From** to the customer identity to appear as the sender of the Welcome email.
  7. Tap **Save and Continue Edit**.

When the customer account is saved, the full set of options appears in the panel on the left and in the menu at the top of the page. The Customer View tab displays a summary of account activity.

The screenshot shows the 'John Doe' customer account page. The left sidebar contains a 'CUSTOMERS' section with a 'Customer View' link. The main content area is titled 'Personal Information' and includes the following details:

- Last Logged In: Never (Offline)
- Confirmed email: Confirmed
- Account Created: Sep 9, 2015 5:14:33 PM
- Account Created In: Default Store View
- Customer Group: General

At the top right, there is a 'Save Customer' button. The top navigation bar includes links for Back, Delete Customer, Reset, Create Order, Reset Password, Force Sign-In, and Save and Continue Edit.

*Customer Account Saved*

## Step 2: Complete the Customer Address and Contact Information

1. In the panel on the left, choose **Addresses**. Then, do the following:
  - a. To add a new address, tap **Add New Addresses**.

The screenshot shows the 'John Doe' customer account page with the 'Addresses' section selected in the left sidebar. The main content area is titled 'Addresses' and includes a 'New Addresses' section with the following options:

- ☐ Default Billing Address
- ☐ Default Shipping Address

Below these options is an 'Add New Addresses' button. To the right of the form, there are input fields for the following information:

- Prefix
- First Name
- Middle Name/Initial
- Last Name
- Suffix

*Add Address to New Customer Account*

- b. To define the type of address, mark one of the following checkboxes:
      - Default Billing Address
      - Default Shipping Address
    - c. If the name of another person is associated with the address, complete the name information as needed. If the name fields are left blank, the customer name will be used for the address.

d. Complete the following address fields as needed:

- Company
- Street Address
- City
- Country
- State/Province
- Zip/Postal Code

e. Complete the following information if available:

- Phone Number
- Fax
- VAT Number

2. When complete, tap **Save Customer**.

### Field Descriptions

FIELD	DESCRIPTION
<b>ACCOUNT INFORMATION</b>	
Associate to Website	Identifies the website associated with the customer account.
Group	Identifies the customer group to which the customer belongs. Select the checkbox to disable automatic group change based on VAT.
Prefix	If used, the prefix that is associated with the customers name. For example: Mr, Mrs. or Dr. Depending on the configuration, the input control might be a text field or a drop-down list of options.
First Name	The customer's first name.
Middle Name / Initial	The customer's middle name or middle initial.
Last Name	The customer's last name.
Suffix	If used, the suffix that is associated with the customer's name. For example: Jr., Sr., or III. Depending on the configuration, the input control might be a text field or a drop-down list of options.
Email	The customer's email address.
Date Of Birth	The customer's date of birth.



**Field Descriptions (cont.)**

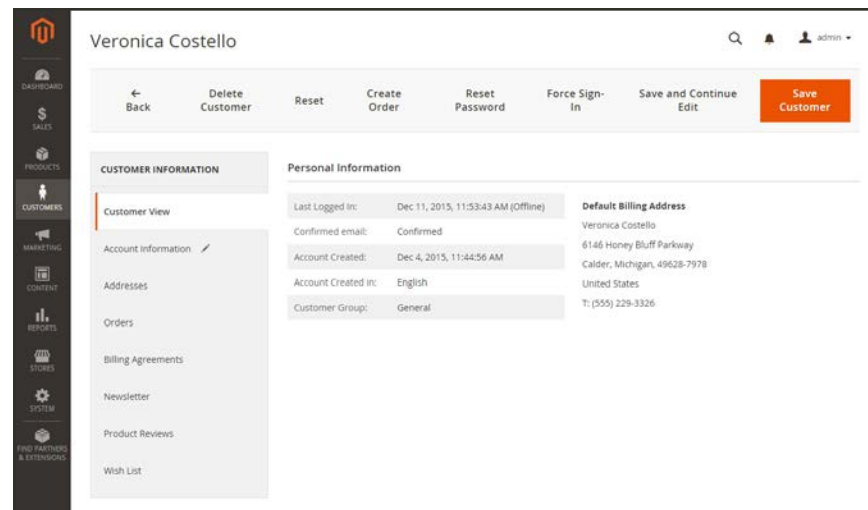
FIELD	DESCRIPTION
Tax / VAT Number	The customer's Tax or Value Added Tax number, if applicable.
Gender	Identifies the customer's gender as Male or Female.
Send Welcome Email From	If you have multiple stores, select the store from which the welcome message will be sent.

**ADDRESSES**

New Addressees	Identifies the type of new address. Options: Default Billing Address Default Shipping Address
<div>Add New Addresses</div>	Displays another New Address section to identify the type of the address to be entered.
Company	The company name, if applicable for this address.
Street Address	The street address of the customer. The second line of the street address can be used if needed.
City	The city where the customer resides at this address.
Country	The country where the customer resides at this address.
State/Province	The state or province of the customer at this address.
Zip/Postal Code	The ZIP or postal code of the customer at this address.
Phone Number	The phone number where the customer can be reached at this address.
Fax	The fax number where the customer can be reached at this address.
VAT Number	If applicable, the value added tax number that applies to the customer at this address.

## Updating Customer Accounts

The panel on the left of the Customer Information page includes information about customer activity, such as when the customer last signed in or out of their account, addresses, order statistics, recent orders, shopping cart contents, product reviews, newsletter subscriptions, and so on.



*Customer Account*

### To update customer information:

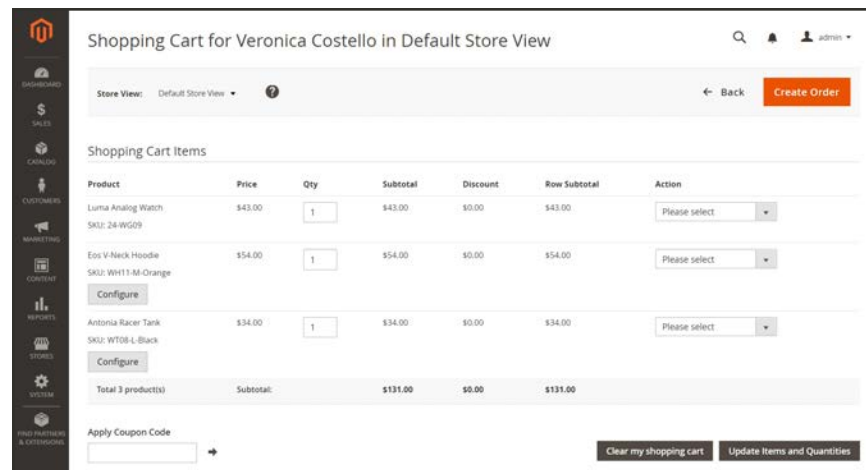
1. On the Admin sidebar, tap **Customers**. Then, choose **All Customers**.
2. Find the customer in the grid. Then in the **Action** column, click **Edit**.
3. In the panel on the left, choose the type of information you need to edit. Then, make any necessary changes to the customer account.
4. When complete, tap **Save Customer**.

## Account Options

OPTION	DESCRIPTION
Reset	Resets any unsaved changes in the customer form to their previous values.
Create Order	Creates a new order that is associated with the customer account.
Reset Password	Resets the customer's password.
Force Sign-In	Clears the tokens associated with the customer's password, and provides the administrator access to the account,
Save and Continue Edit	Saves any changes to the customer account, and keeps the customer record open.
Save Customer	Saves any changes to the customer account, and closes the customer record.

## Managing a Shopping Cart

To begin an assisted shopping session, the customer must be logged into their account from the storefront to make the information available. If the customer doesn't have an account, you can [create one](#).

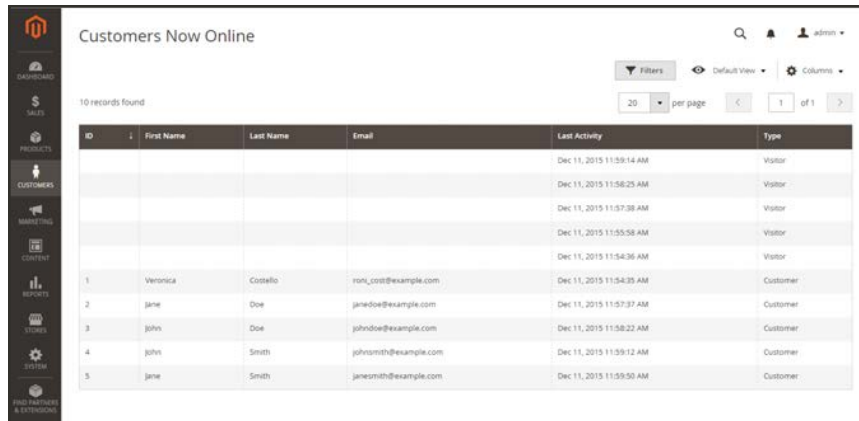


*Shopping Cart in Customer Account*

### To verify that the customer is logged in:

1. In the Admin sidebar, tap **Customers**.
2. Choose **Now Online**.

All visitors to the store and logged in customers appear in the list.



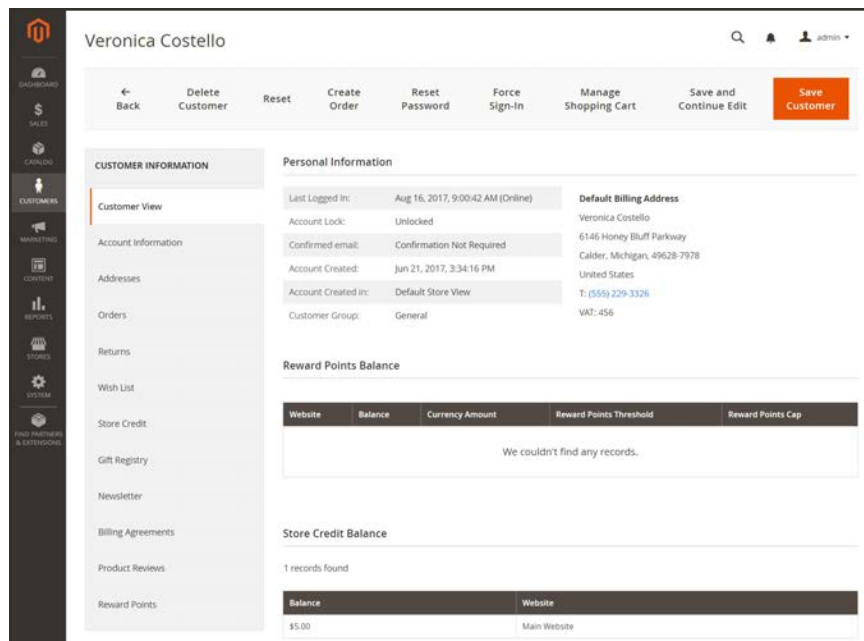
ID	First Name	Last Name	Email	Last Activity	Type
				Dec 11, 2015 11:59:14 AM	Visitor
				Dec 11, 2015 11:58:25 AM	Visitor
				Dec 11, 2015 11:57:38 AM	Visitor
				Dec 11, 2015 11:55:58 AM	Visitor
				Dec 11, 2015 11:54:36 AM	Visitor
1	Veronica	Costello	ron_cot@example.com	Dec 11, 2015 11:54:35 AM	Customer
2	Jane	Doe	janedoe@example.com	Dec 11, 2015 11:57:37 AM	Customer
3	John	Doe	johndoe@example.com	Dec 11, 2015 11:58:22 AM	Customer
4	John	Smith	johsmith@example.com	Dec 11, 2015 11:59:12 AM	Customer
5	Jane	Smith	janasmith@example.com	Dec 11, 2015 11:59:50 AM	Customer

*Customers Now Online*

### To offer assisted shopping:

1. In the Admin sidebar, tap **Customers**. Then, choose **All Customers**.
2. In the list, open the customer record in edit mode. To find the customer record in a hurry, use the **Filters** control.

In the customer profile under Personal Information, the Last Logged In date and time shows that the customer is currently online.



**Veronica Costello**

Back Delete Customer Reset Create Order Reset Password Force Sign-In Manage Shopping Cart Save and Continue Edit **Save Customer**

**CUSTOMER INFORMATION**

Customer View

Account Information

Addresses

Orders

Returns

Wish List

Store Credit

Gift Registry

Newsletter

Billing Agreements

Product Reviews

Reward Points

**Personal Information**

Last Logged In: Aug 16, 2017, 9:00:42 AM (Online)

Account Lock: Unlocked

Confirmed email: Confirmation Not Required

Account Created: Jun 21, 2017, 3:34:16 PM

Account Created In: Default Store View

Customer Group: General

**Default Billing Address**

Veronica Costello

6146 Honey Bluff Parkway

Calder, Michigan, 49628-7978

United States

T: (555) 229-3326

VAT: 456

**Reward Points Balance**

Website	Balance	Currency Amount	Reward Points Threshold	Reward Points Cap
We couldn't find any records.				

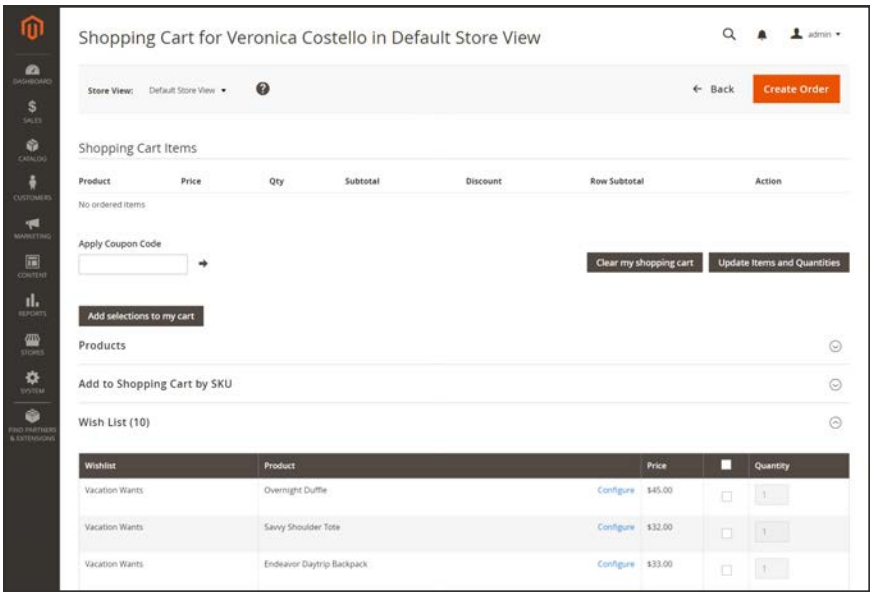
**Store Credit Balance**

1 records found

Balance	Website
\$5.00	Main Website

*Customer Profile of Online Customer*

3. In the button bar across the top of the page, tap **Manage Shopping Cart** to enter assisted shopping mode.



Assisted Shopping Mode

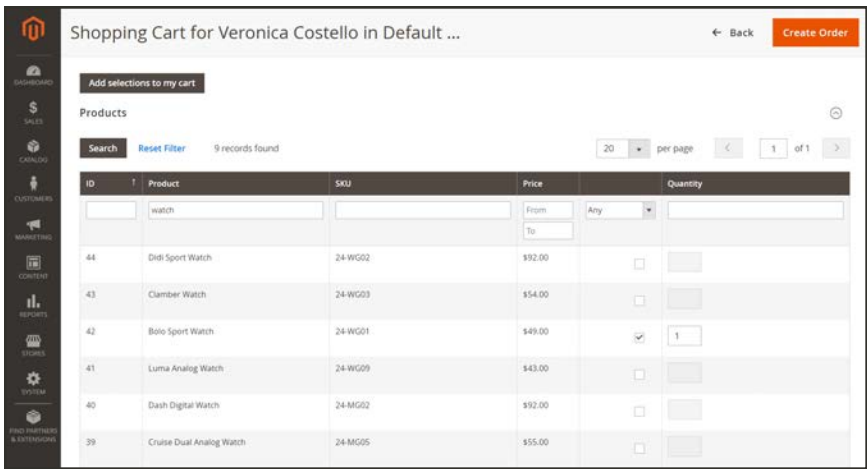
4. Use any of the following methods to add products to the cart.

Method 1: Add Products to Cart

- 1. Expand the **Products** section.
- 2. To find a product, use any of the filters at the top of each column. Then, tap **Search**.

Add a Simple Product

- a. Click the product that you want to order. The record is selected, and the default **Quantity** of 1 is entered. If necessary, update the quantity ordered.
- b. On the left above the grid, tap **Add selections to my cart**.



Add Product to Cart

The line item is added to the Shopping Cart at the top of the page.

Shopping Cart for Veronica Costello in Default ...

Shopping Cart Items

Product	Price	Qty	Subtotal	Discount	Row Subtotal	Action
Luma Analog Watch SKU: 24-WG09	\$43.00	1	\$43.00	\$0.00	\$43.00	Please select
Total 1 product(s)		Subtotal:	\$43.00	\$0.00	\$43.00	

Apply Coupon Code

Clear my shopping cart Update Items and Quantities

Add selections to my cart

Products

Search Reset Filter 9 records found

20 per page 1 of 1

ID	Product	SKU	Price	Quantity
	watch		From Any To	

*Cart Updated*

### Add a Configurable Product

1. In the grid, click **Configure**.

Shopping Cart for Veronica Costello in Default ...

Shopping Cart Items

Product	Price	Qty	Subtotal	Discount	Row Subtotal	Action
Luma Analog Watch SKU: 24-WG09	\$43.00	1	\$43.00	\$0.00	\$43.00	Please select
Total 1 product(s)		Subtotal:	\$43.00	\$0.00	\$43.00	

Apply Coupon Code

Clear my shopping cart Update Items and Quantities

Add selections to my cart

Products

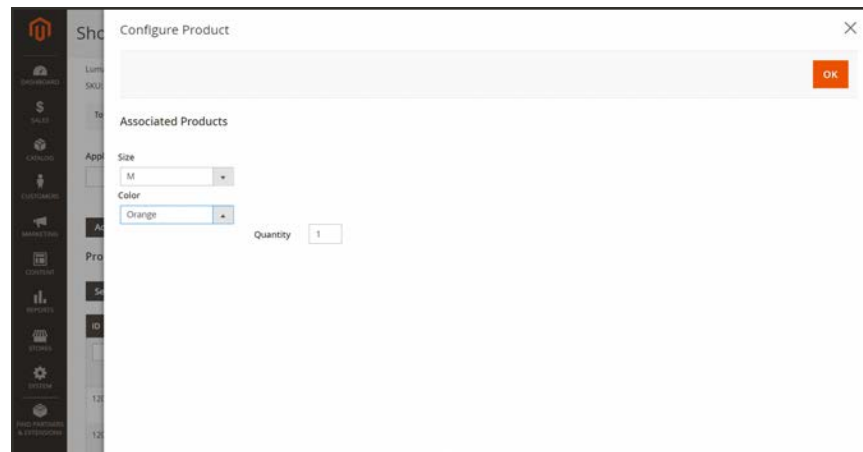
Search Reset Filter 198 records found

20 per page 1 of 10

ID	Product	SKU	Price	Quantity
	hoodie		From Any To	
1202	Eos V-Neck Hoodie	WH11	\$54.00	<input type="checkbox"/>
1201	Eos V-Neck Hoodie-XL-Orange	WH11-XL-Orange	\$54.00	<input type="checkbox"/>

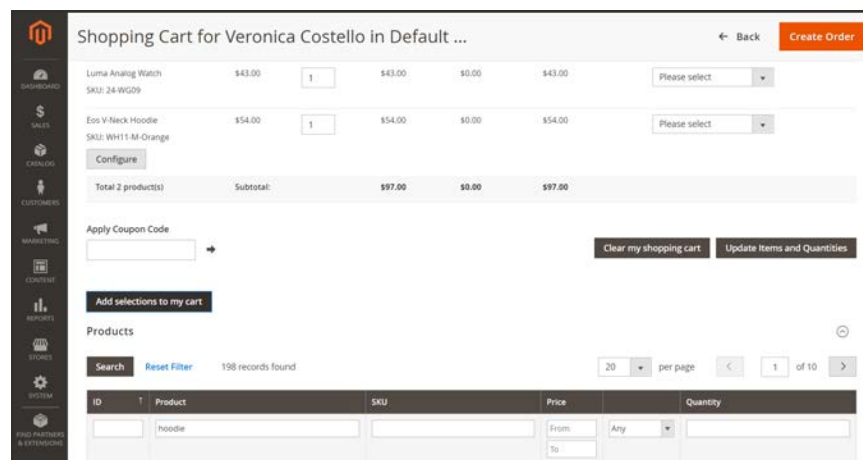
*Configure*

2. Under **Associated Products**, choose each product option to describe the item to be ordered. Then, enter the **Quantity**.
3. Click **OK**.

*Choose Options*

The product is selected with a checkmark, and the quantity ordered appears in the grid.

4. To add the product to the cart, tap **Add selections to my cart.**

*Configurable Product in Cart*

5. If you need to update the options after the product has been added to the cart, tap **Configure**. Then, update the options and tap **OK**.

## Method 2: Add Item by SKU

1. Expand ☰ the **Add to Shopping Cart by SKU** section. Then, use of the following methods to add products to your cart.

### Add Items Individually

- a. Enter the **SKU** and **Qty** of the item to be ordered.
- b. To order another product, tap **Add another.**

*Add Products by SKU*

- c. Tap **Add selections to my cart.**
- d. If the item is a configurable product, choose the product options when prompted. Then, tap **Add to Shopping Cart.**


*Add Products by SKU*

### Upload CSV File

1. Before you begin, prepare a **csv file** with the items to be added to the cart. The file must contain only two columns, with “sku” and “qty” in the header.
2. Tap **Choose File.**
3. Select the file to be uploaded from your directory.

### Method 3: Transfer an Item

Items can be transferred to the cart from the customer’s wish list, recently viewed, compared, or ordered items. The number of items in each section appears in parentheses after the section header.

1. Expand  one of the following sections.
  - Wish List
  - Products in the Comparison List
  - Recently Compared Products
  - Recently Viewed Products
  - Last Ordered Items
2. In the grid, select each product to be ordered. and enter the **Quantity**.
3. To enter the options for a configurable product, tap **Configure**. Then, follow the instructions in Method 1 to choose each product option.
4. When complete, tap **Add selections to my cart.**



5. To adjust the quantity ordered of any item, do the following:
  - a. In the **Qty** column of the product to be adjusted, enter the correct amount.
  - b. Click **Update Items and Quantities**.

6. To apply a coupon code to the cart, do the following:
  - a. In the **Apply Coupon Code** field, enter a valid coupon code.
  - b. Click the **Apply** ( ➔ ) arrow.

7. When ready to place the order, tap **Create Order**.

The Create New Order page appears in the account, with the items in the cart, followed by the shipping and payment information.

8. Complete the shipping and payment information, and tap **Submit Order**. To learn more, see: [Creating an Order](#).

## Creating an Order

For registered customers who need assistance, you can create an entire order directly from the Admin. The Create New Order form includes all the information that is needed to complete the normal checkout process, with activity summaries from the customer's account dashboard.

The screenshot shows the 'Create New Order' form for a customer named Veronica Costello. The form is titled 'Create New Order for Veronica Costello in English'. It includes a sidebar with navigation links: Dashboard, Sales, Products, Customers, Marketing, Content, Reports, Stores, System, and Third Parties & Extensions. The main content area is divided into several sections:

- Order Currency:** A dropdown menu set to 'US Dollar'.
- Customer's Activities:** A list of activities with checkboxes: Shopping Cart (0), No items, Wish List (0), No items, and Last Ordered Items (4).
- Items Ordered:** A table with columns: Product, Price, Qty, Subtotal, Discount, Row Subtotal, and Action. It currently shows 'No ordered items'.
- Account Information:** Fields for Group (General) and Email (roni\_cost@example.com).
- Address Information:** Fields for Billing Address and Shipping Address. The Billing Address is selected from existing customer addresses: Veronica Costello, 6146 Honey Bluff Parkway, Cal. The Shipping Address is also selected from existing customer addresses: Veronica Costello, 6146 Honey Bluff Parkway, Cal. There are checkboxes for 'Same As Billing Address' and 'Prefix'.

*Create New Order*

### To create a new order:

1. On the Admin sidebar, tap **Customers**.
2. Find the customer in the grid. Then in the **Action** column, click **Edit**.
3. In the workspace header, tap **Create Order**.

The screenshot shows the workspace header with the following buttons: Back, Delete Customer, Reset, Create Order, Reset Password, Force Sign-In, Save and Continue Edit, and Save Customer.

4. If your store has multiple views, choose the store view where the order is to be placed. .
5. To add products from the **Customer's Activities**, mark the checkbox of each product in the panel on the left. Then, scroll down and tap **Update Changes** . The item appears in the order form.

Order Currency: US Dollar

Customer's Activities

- Shopping Cart (0)
- Wish List (1)

Item Qty Price

Complete Track Tote	1	\$32.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>
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**Add to Cart**

Items Ordered

Product	Price	Qty	Subtotal	Discount	Row Subtotal	Action
No ordered items						

Account Information

Group: General Email: ronl\_cost@example.com

Billing Address Shipping Address

*Add to Cart*

6. To add products from the catalog, tap **Add Products**. Then, do the following:

Items Ordered

Product	Price	Qty	Subtotal	Discount	Row Subtotal	Action
Complete Track Tote SKU: 24-WB02	\$32.00	<input type="text" value="1"/>	\$32.00	\$0.00	\$32.00	Please select
		<input type="checkbox"/> Custom Price*		<input checked="" type="checkbox"/> Apply		
Total 1 product(s)		Subtotal:	\$32.00	\$0.00	\$32.00	

\* - Enter custom price excluding tax

Apply Coupon Code

**Update Items and Quantities**

*Add Products*

- a. In the grid, mark the checkbox of each product to be added to the cart, and enter the **Qty** to be purchased.

Please select products

Search Reset Filter 2046 records found

20 per page 1 of 103

ID	Product	SKU	Price	Select	Quantity
			From To	Any	
2046	Set of Sprite Yoga Straps	24-WG085_Group		<input checked="" type="checkbox"/>	
2045	Erika Running Short	WSH12	\$45.00	<input type="checkbox"/>	
2044	Erika Running Short-32-Red	WSH12-32-Red	\$45.00	<input checked="" type="checkbox"/>	<input type="text" value="1"/>
2043	Erika Running Short-32-Purple	WSH12-32-Purple	\$45.00	<input type="checkbox"/>	

*Select Products*

- b. If the product has multiple options, tap **Configure**. Complete the options as needed, and tap **OK**. Then, click the **Add Selected Product(s) to Order** link to update the cart.
- c. To override the price of an item, mark the **Custom Price** checkbox. Then, enter the new price in the box below. To update the cart totals, tap **Update Items and Quantities**.

Product	Price	Qty	Subtotal	Discount	Row Subtotal	Action
Complete Track Tote SKU: 24-WB02	\$32.00 <input type="checkbox"/> Custom Price*	1	\$32.00	\$0.00 <input checked="" type="checkbox"/> Apply	\$32.00	Please select
Erika Running Short-32-Red SKU: WSH12-32-Red	\$45.00 <input checked="" type="checkbox"/> Custom Price* 40.00		\$45.00	\$0.00 <input checked="" type="checkbox"/> Apply	\$45.00	Please select
Total 2 product(s)			Subtotal:	\$0.00	\$77.00	

\* - Enter custom price excluding tax

Apply Coupon Code

Update Items and Quantities

Custom Price

- d. Complete the following sections as needed for the order:
  - Apply Coupon Codes
  - Payment Method
  - Shipping Method
  - Order Comments
7. When complete, tap **Submit Order**. A confirmation is sent to the customer, and the customer can view the order details from their account.

#000000005

Back Cancel Send Email Hold Invoice Ship Reorder Edit

You created the order.

**ORDER VIEW**

Information Invoices Credit Memos Shipments Comments History

**Order & Account Information**

Order # 000000005 (The order confirmation email was sent)

Order Date: Dec 14, 2015, 10:39:09 AM

Order Status: Pending

Purchased From: Main Website, Main Website Store, English

**Account Information**

Veronica Costello  
mycost@sample.com  
General

**Address Information**

**Billing Address** Edit

Veronica Costello  
8146 Honey Bluff Parkway  
Calder, Michigan, 49628-7979  
United States  
T: (555) 229-3326

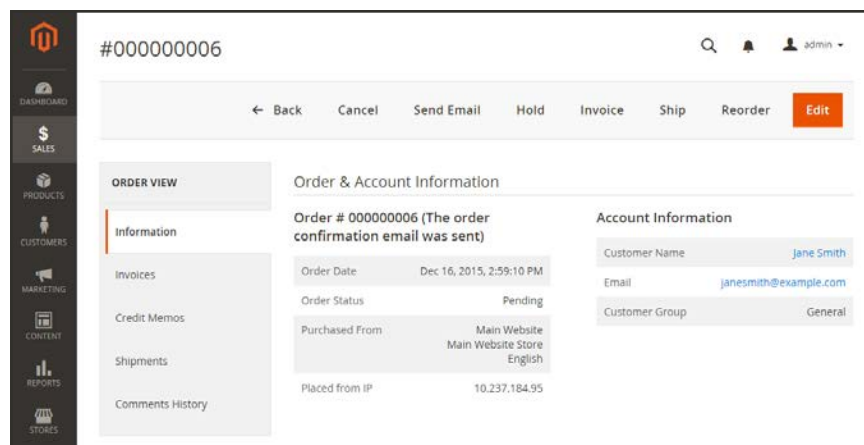
**Shipping Address** Edit

Veronica Costello  
8146 Honey Bluff Parkway  
Calder, Michigan, 49628-7979  
United States  
T: (555) 229-3326

Order Created

## Updating an Order

After a customer places an order, it is sometimes necessary to edit the order, place it on hold, or cancel it entirely. When you change an order, the original order is canceled and a new order is generated. You can, however, change the billing or shipping address without generating a new order.



*Edit Order*

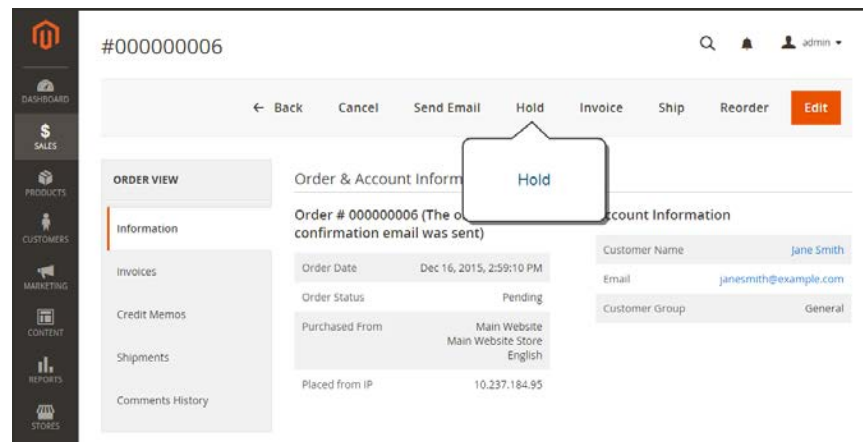
### To edit an order:

1. On the Admin sidebar, tap **Sales**. Then under **Operations**, choose **Orders**.
2. Find the order to be edited. Then in the **Action** column, click the **View** link.
3. Tap **Edit**. When prompted to confirm, tap **OK** to continue.
4. Make the necessary changes to the order.
5. When complete, do one of the following:
  - To save changes made to the billing or shipping address, tap **Save**.
  - To save changes made to line items, and reprocess the order, tap **Submit Order**.

### To place an order on hold:

If the customer's preferred method of payment is not available, or if the item is temporarily out of stock, you can put the order on hold.

1. In the Orders grid, find the pending order that you want to place on hold.
2. In the **Action** column, click the **View** link.
3. Tap **Hold** to place the order on hold.



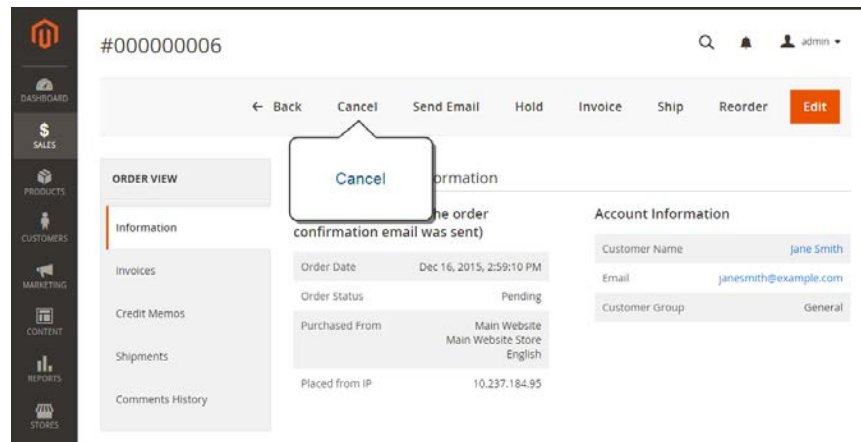
*Hold Order*

4. When you are ready to return the order to an active state, repeat the process and tap **Unhold**.

### To cancel an order:

Canceling an order changes its status from “Pending” to “Canceled.”

1. In the Orders grid, find the pending order to be canceled.
2. In the **Action** column, click the **View** link.
3. Tap **Cancel**.



### *Cancel Order*

The status of the order is now “Canceled.”

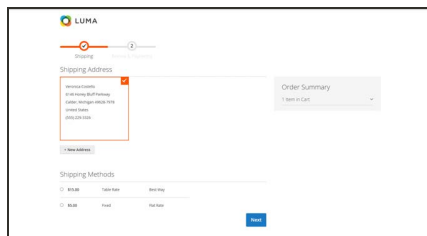
## CHAPTER 57:

# Checkout

When the checkout process begins, the transaction shifts to a secure, encrypted channel. A padlock symbol appears in the address bar of the browser, and the URL changes from “http” to “https”.

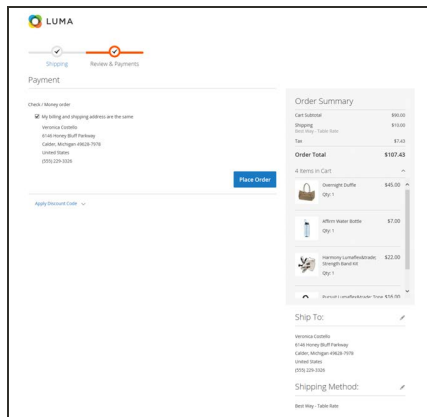
From this point on, the goal is to gather the information necessary to complete the transaction. The Checkout page leads the customer through each step of the process. Customers who are logged into their accounts can complete checkout quickly, because much of the information is already in their accounts.

### Checkout Steps



#### Step 1: Shipping

The first step of the checkout process is for the customer to complete the shipping address information, and to choose the shipping method.



#### Step 2: Review & Payments

During the second step of the checkout process, the customer chooses the payment method, and applies any coupons with promotional codes to the purchase.

The **order confirmation** appears after the order is placed. For registered customers, the page includes the order number with a link to the customer's account, and a link to generate a receipt.



## Checkout Step 1: Shipping

The first step of the checkout process is for the customer to complete the shipping address information, and to choose the shipping method. If the customer has an account, the shipping address is entered automatically, but can be changed if needed. The progress bar at the top of the page follows each step of the checkout process, and the Order Summary shows the information entered so far.

**LUMA**

Shipping **2** Review & Payment

**Shipping Address**

Veronica Costello  
6146 Honey Bluff Parkway  
Calder, Michigan 49628-7978  
United States  
(555) 229-3326

+ New Address

**Shipping Methods**

☐ \$15.00 Table Rate Best Way

☐ \$5.00 Fixed Flat Rate

**Order Summary**  
1 item in Cart

Next

*Checkout Step 1: Shipping*

## Checkout Step 2: Review & Payments

During the second step of the checkout process, the customer chooses the payment method, and applies any coupons with promotional codes to the purchase. All information can be reviewed, and edited if needed. If enabled, the customer must to agree to the terms and conditions of the sale before placing the order.

**LUMA**

Shipping Review & Payments

**Payment**

Check / Money order

☒ My billing and shipping address are the same

Veronica Costello  
6146 Honey Bluff Parkway  
Calder, Michigan 49628-7978  
United States  
(555) 229-3326

[Place Order](#)

[Apply Discount Code](#)

**Order Summary**

Cart Subtotal	\$90.00
Shipping Best Way - Table Rate	\$10.00
Tax	\$7.43
<b>Order Total</b>	<b>\$107.43</b>

4 Items in Cart

- Overnight Duffel Qty: 1 \$45.00
- Affirm Water Bottle Qty: 1 \$7.00
- Harmony Lumaflex&trade; Strength Band Kit Qty: 1 \$22.00
- Pursuit Lumaflex&trade; Tube \$16.00

**Ship To:**

Veronica Costello  
6146 Honey Bluff Parkway  
Calder, Michigan 49628-7978  
United States  
(555) 229-3326

**Shipping Method:**

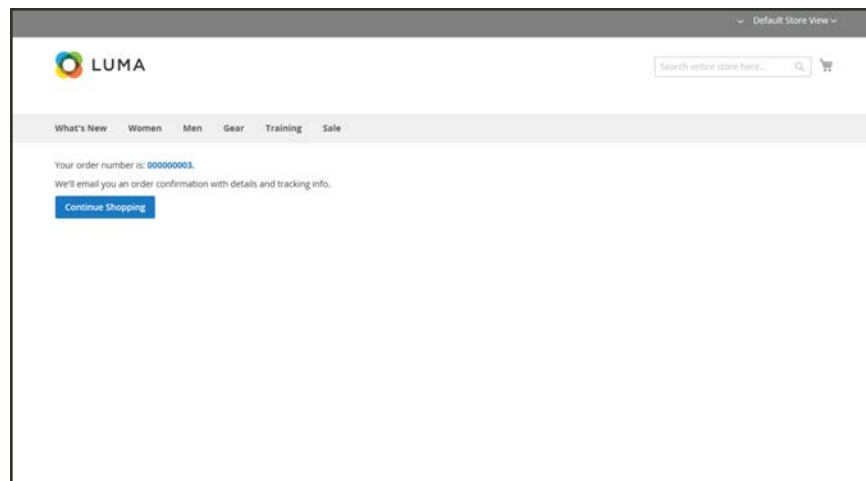
Best Way - Table Rate

### *Review & Payments*

## Order Confirmation

The order confirmation appears after the order is placed. For registered customers, the page includes the order number with a link to the customer's account, and a link to generate a receipt. Registered customers are told that they will receive order confirmation and tracking info by email. Guests are encouraged to create an account to track the order. Registered customers can generate a receipt by clicking a link.

The order confirmation page is also called the “Success” page, and is used by analytics programs to track conversions.



*Order Confirmation*

## Checkout Configuration


The checkout configuration determines the format of the page, the requirements to make a purchase, and the options that are presented during the checkout process.

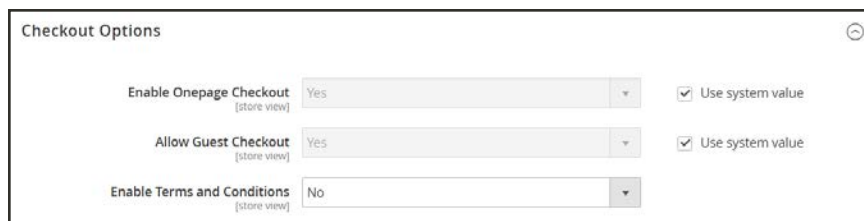
- [Guest Checkout](#)
- [Terms and Conditions](#)
- [One Page Checkout](#)
- [Checkout Totals Sort Order](#)

## Checkout Options

The checkout configuration determines the layout of the checkout page, and if shoppers must register for an account and agree to the terms and conditions of the sale before making a purchase.

### To change the checkout options:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Checkout**.
3. Expand  the **Checkout Options** section.
4. Set the following to your preference:
  - Enable **Onepage Checkout**
  - Allow **Guest Checkout**
  - Enable **Terms and Conditions**



Checkout Options	
Enable Onepage Checkout <small>[store view]</small>	Yes <input type="checkbox"/> Use system value
Allow Guest Checkout <small>[store view]</small>	Yes <input checked="" type="checkbox"/> Use system value
Enable Terms and Conditions <small>[store view]</small>	No

### *Checkout Options*

5. When complete, tap **Save Config.**

## Guest Checkout

Your store can be configured to require that shoppers open an account before making a purchase, or to allow unregistered guests to go through the checkout process. The default setting allows guests to make purchases, with an option to register for an account after they complete the checkout process.

The screenshot shows the LUMA checkout interface. At the top left is the LUMA logo. Below it, a 'Checkout Method' section is highlighted. It contains two main options: 'Check Out as a Guest' with a blue 'Continue' button, and a 'Login' section. The 'Login' section includes the text 'Already registered? Please sign in below:', followed by 'Email' and 'Password' input fields, each with a red asterisk indicating they are required. Below these fields is a blue 'Login' button and a 'Forgot Your Password?' link. At the bottom right, a red asterisk is followed by the text '\* Required Fields'.

*Checkout as Guest*

### To change the guest checkout setting:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Checkout**.
3. Expand ☯ the **Checkout Options** section.
4. If necessary, clear the **Use system value** checkbox. Then, do the following:
  - a. If the setting is for a specific store view, choose the store view where the configuration applies.
  - b. When prompted, tap **OK** to continue.
5. Set **Allow Guest Checkout** to your preference:

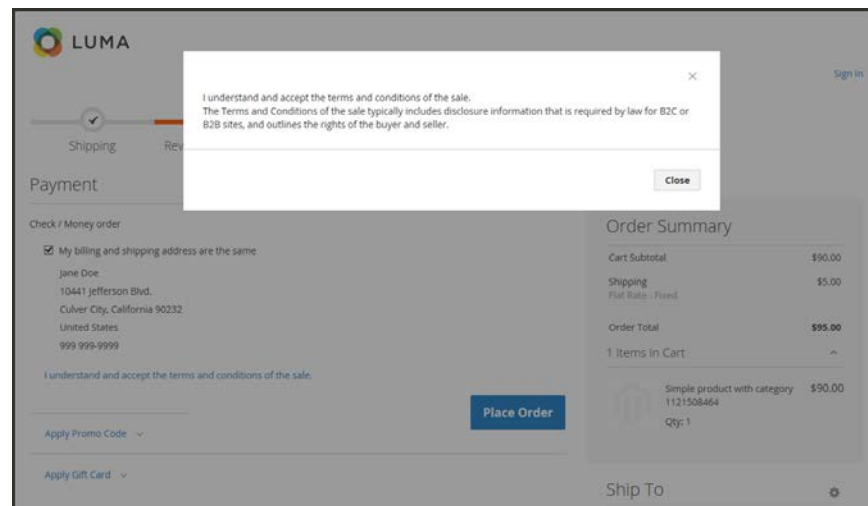
The screenshot shows the 'Checkout Options' configuration panel. It has a title bar with a close button (⊘). Inside, there are three settings, each with a label, a dropdown menu, and a 'Use system value' checkbox. The first setting is 'Enable Onepage Checkout' with a dropdown set to 'Yes' and the checkbox checked. The second setting is 'Allow Guest Checkout' with a dropdown set to 'Yes' and the checkbox checked. The third setting is 'Enable Terms and Conditions' with a dropdown set to 'No' and the checkbox checked. Each dropdown menu has a small downward arrow icon.

*Checkout Options*

6. When complete, tap **Save Config.**

## Terms and Conditions

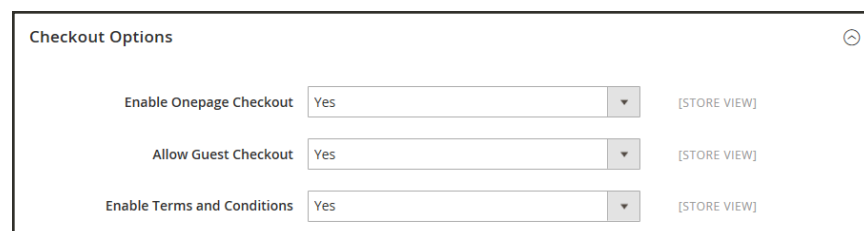
When Terms and Conditions is enabled, customers are required to agree to the terms and conditions of the sale before the purchase is finalized. The Terms and Conditions of the sale typically includes disclosure information that might be required by law for B2C or B2B sites, and outlines the rights of the buyer and seller. The Terms and Conditions message appears after the payment information, just before the Place Order button.



*Terms and Conditions at Checkout*

### Step 1: Enable Terms and Conditions

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Checkout**.
3. Expand ☑ the **Checkout Options** section. Then, do the following:
  - a. Verify that **Enable Onepage Checkout** is set to "Yes."
  - b. Set **Enable Terms and Conditions** to "Yes."

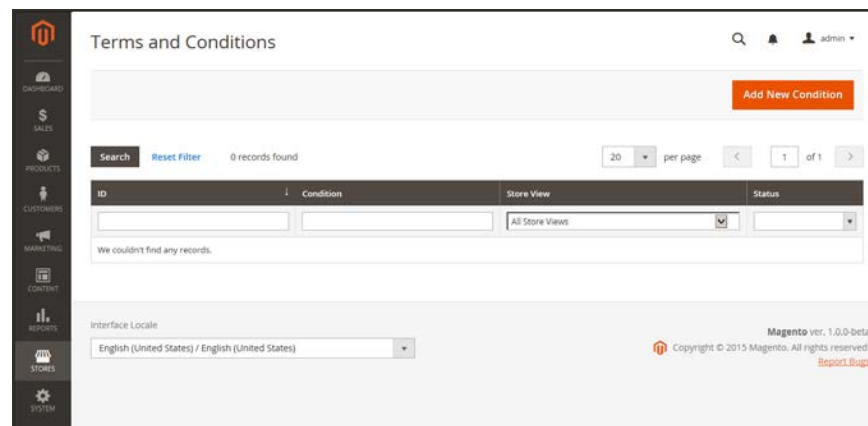


*Checkout Options*

4. When complete, tap **Save Config.**

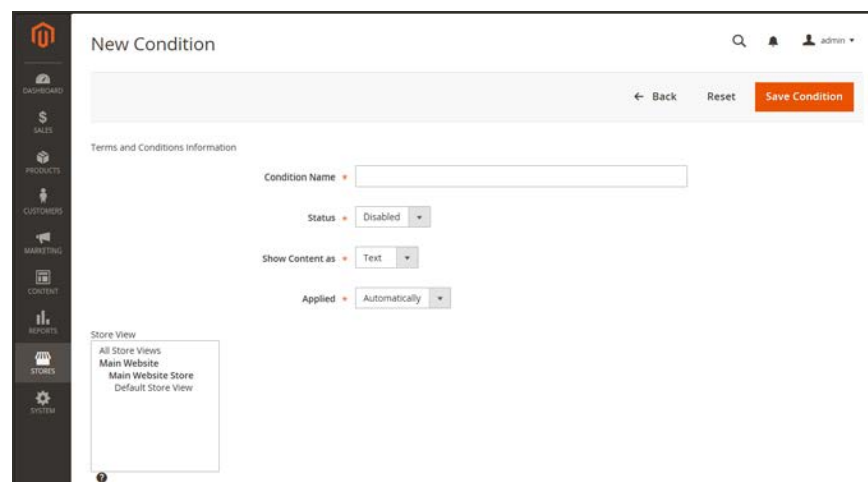
## Step 2: Add Your Terms and Conditions

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Terms and Conditions**.
2. In the upper-right corner, tap **Add New Condition**.



*Terms and Conditions Information*

3. In the Terms and Conditions Information section, complete the following:



*New Condition*

- a. Enter the **Condition Name** for internal reference.
- b. Set **Status** to “Enabled.”



- c. Set **Show Content as** to one of the following:

Text	Displays the terms and conditions content as unformatted text.
HTML	Displays the content as HTML which can be formatted..
4. Select each **Store View** where the Terms and Conditions is to be used.
5. Enter the **Checkbox Text** to be used as the text for the Terms and Conditions link. For example, "I understand and accept the terms and conditions of the sale.
6. In the **Content** box, enter the full text of the terms and conditions of the sale.
7. (Optional) Enter the **Content Height (css)** in pixels, to determine the height of the text box where the terms and conditions statement appears during checkout. For example, to make the text box one inch high on a 96 dpi display, enter 96. A scroll bar appears if the content extends beyond the height of the box.
8. When complete, tap **Save Condition**.

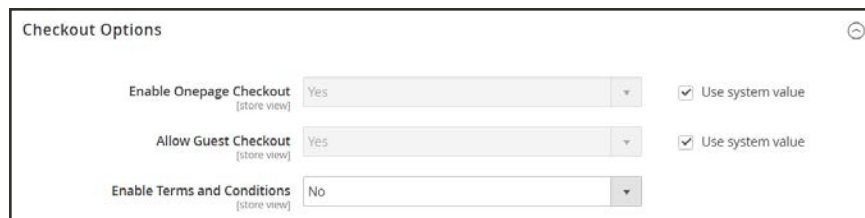
## One Page Checkout

The purpose of OnePage Checkout is to gather the information that is needed, and complete the sale as quickly as possible. When Onepage Checkout is enabled, the entire checkout process takes place on a single page. Each section of the checkout information is expanded as needed.

Magento's Onepage Checkout is enabled by default. If you are implementing a custom integration or checkout extension, it might be necessary to disable Onepage Checkout.

### To disable Onepage Checkout:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Checkout**.



The screenshot shows the 'Checkout Options' configuration panel. It contains three settings, each with a dropdown menu and a 'Use system value' checkbox. The first setting, 'Enable Onepage Checkout', is set to 'Yes'. The second setting, 'Allow Guest Checkout', is also set to 'Yes'. The third setting, 'Enable Terms and Conditions', is set to 'No'. Each setting has a '[store view]' link below it.

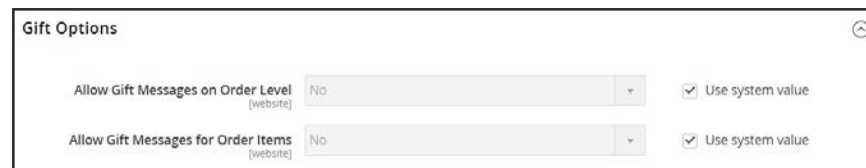
Setting	Value	Use system value
Enable Onepage Checkout [store view]	Yes	<input checked="" type="checkbox"/>
Allow Guest Checkout [store view]	Yes	<input checked="" type="checkbox"/>
Enable Terms and Conditions [store view]	No	<input type="checkbox"/>

### Checkout Options

3. Expand ☺ the **Checkout Options** section.
4. If necessary, clear the **Use system value** checkbox. Then, do the following:
  - a. If the setting is for a specific store view, choose the store view where the configuration applies.
  - b. When prompted, tap **OK** to continue.
5. Set **Enable Onepage Checkout** to “No.”
6. When complete, tap **Save Config**.

## Gift Options

The selection of available gift options appears during the Shipping Method step of the checkout process. The Gift Options configuration determines if customers have the option to add a gift message to the complete order, and for individual items. The **scope** of the Gift Options configuration applies to the entire website, but can be overridden at the product level.

The screenshot shows the 'Gift Options' configuration panel. It has a title bar 'Gift Options' with a close icon. Below the title bar, there are two rows of settings. The first row is 'Allow Gift Messages on Order Level' with a dropdown menu set to 'No' and a checkbox 'Use system value' which is checked. The second row is 'Allow Gift Messages for Order Items' with a dropdown menu set to 'No' and a checkbox 'Use system value' which is checked. Both dropdown menus have a small downward arrow icon.

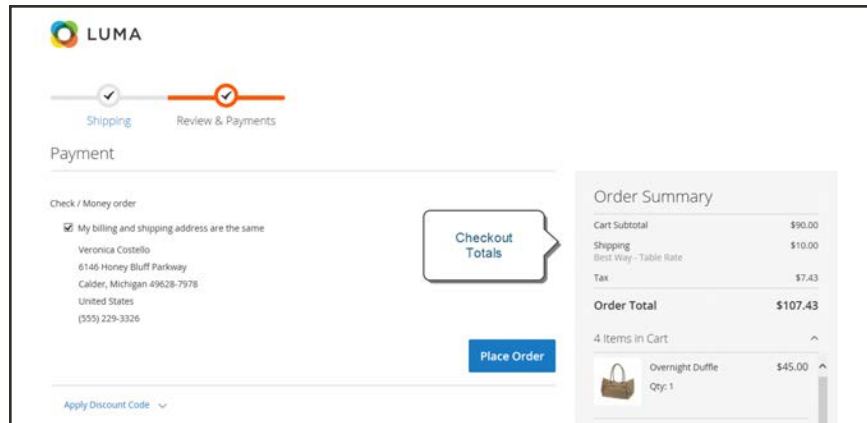
### *Gift Options*

#### To enable gift options:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Sales**.
3. Expand ☯ the **Gift Options** section.
4. If necessary, clear the **Use system value** checkbox. Then, do the following:
  - a. If the setting is for a specific store view, choose the store view where the configuration applies.
  - b. When prompted, tap **OK** to continue.
5. Set the **Gift Message** options according to your preference:
  - Allow Gift Messages on Order Level
  - Allow Gift Messages for Order Items
6. When complete, tap **Save Config**.


## Checkout Totals Sort Order

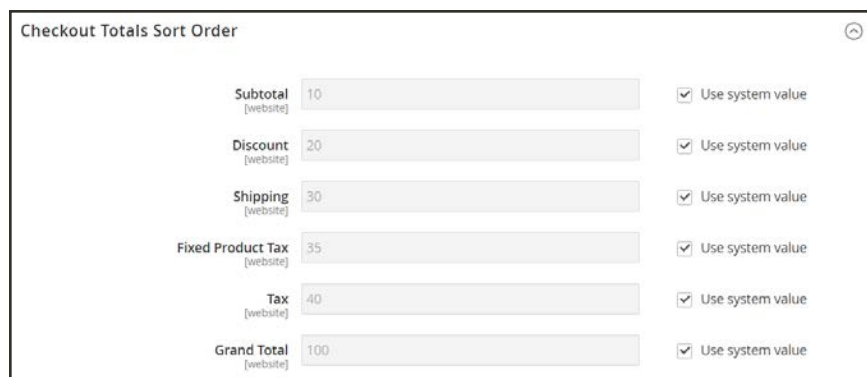
During Order Review, the total appears at the bottom of the order, with any adjustments for discounts, shipping charges, store credit, and tax. The order of each item determines the sequence of the calculations, and is set in the configuration by a number that is assigned to each item. For example, the Subtotal is the first item in the section, and is assigned a value of 10. The Grand Total appears last, and is assigned a value of 100. All of the other items in the totals section are assigned a value between those values.



*Checkout Totals*

### To configure the checkout totals:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Sales**.
3. Expand  the **Checkout Totals Sort Order** section.



*Checkout Totals Sort Order*

4. If necessary, clear the **Use system value** checkbox. Then, do the following:

- a.** If the setting is for a specific store view, choose the store view where the configuration applies.
  - b.** When prompted, tap **OK** to continue.
- 5.** Change the number assigned to each item to determine its order in the Totals section..
- 6.** When complete, tap **Save Config.**

# Order Management

## Contents

In this section of the guide, you will learn about each stage of the order workflow, and how to process orders, create invoices, and shipments. You will also learn how to issue credit memos and manage returns.

### Orders

#### Orders Workspace

- Order Actions

- Order Search

- Grid Layout

#### Order Workflow

- Processing Orders

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- Scheduled Grid Updates

#### Order Archive

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- Creating an Invoice

- Printing Multiple Invoices

#### Shipments

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- Product Return Workflow

- Issuing a Credit Memo

- Printing Credit Memos

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  - Store Credit Workflow

  - Applying Store Credit

  - Configuring Store Credit

  - Refunds to Customer Account

#### Returns

- RMA Workflow

- Configuring Returns

- Returns Attribute

#### Billing Agreements

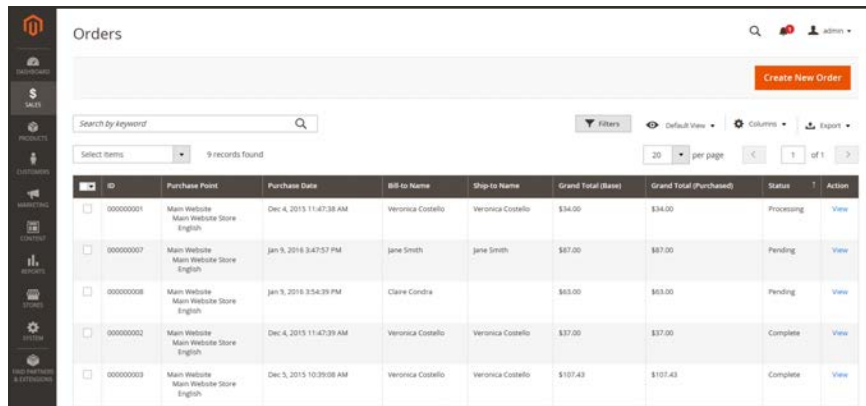
Transactions



## CHAPTER 58:

# Orders

The Orders workspace lists all current orders. Each row in the grid represents an order, and each column represents an attribute, or data field. Use the standard **controls** to sort and filter the list, find orders, and apply **actions** to selected orders. You can view existing orders, and create new orders. The tabs above the pagination controls can be used to filter the list, change the default view, change and rearrange columns, and export data.

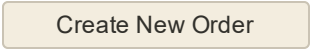

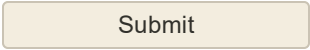


The screenshot shows the 'Orders' workspace in the Magento admin interface. It includes a sidebar with navigation icons, a top navigation bar with a search icon and user profile, and a main content area. The main area has a 'Create New Order' button, a search bar, and a table of orders. The table has columns for ID, Purchase Point, Purchase Date, Bill to Name, Ship to Name, Grand Total (Base), Grand Total (Purchased), Status, and Action. There are 9 records found, and the table is paginated to 20 per page.

ID	Purchase Point	Purchase Date	Bill to Name	Ship to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Action
00000001	Main Website Main Website Store English	Dec 4, 2015 11:47:38 AM	Veronica Costello	Veronica Costello	\$34.00	\$34.00	Processing	<a href="#">View</a>
00000007	Main Website Main Website Store English	Jan 5, 2016 3:47:57 PM	Jane Smith	Jane Smith	\$87.00	\$87.00	Pending	<a href="#">View</a>
00000008	Main Website Main Website Store English	Jan 5, 2016 3:54:39 PM	Clare Condra		\$63.00	\$63.00	Pending	<a href="#">View</a>
00000002	Main Website Main Website Store English	Dec 4, 2015 11:47:39 AM	Veronica Costello	Veronica Costello	\$37.00	\$37.00	Complete	<a href="#">View</a>
00000003	Main Website Main Website Store English	Dec 3, 2015 10:39:08 AM	Veronica Costello	Veronica Costello	\$107.43	\$107.43	Complete	<a href="#">View</a>

Orders

## Workspace Controls

CONTROL	DESCRIPTION
Search	Initiates a search for orders based on keywords entered in the search box, and current filters.
	Creates a new order.
	Displays the list of archived orders.
Search	Initiates a search for orders based on the current filters.
Reset Filter	Restores all filters to a blank state.
Actions	<p>Lists all actions that can be applied to selected orders. To apply an action to an order, or group of orders, mark the checkbox in the first column of each order. Order actions:</p> <ul style="list-style-type: none"> <li>Cancel</li> <li>Hold</li> <li>Unhold</li> <li>Print Invoices</li> <li>Print Packing Slips</li> <li>Print Credit Memos</li> <li>Print All</li> <li>Move to Archive</li> </ul>
Mass Actions	Can be used to select multiple records as the target of action. Mark the checkbox in the first column of each record that is subject to the action. Options: Select All, Unselect All, Select Visible, and Unselect Visible
	Applies the current action to the selected order records.
Edit	Opens the order in edit mode.

## Columns

COLUMN	DESCRIPTION
Selection State	Filters the list of orders based on checkbox status. Options: <div> <div>Any</div> <div>Lists all records, regardless of checkbox status.</div> </div> <div> <div>Yes</div> <div>Lists only records with the checkbox marked.</div> </div> <div> <div>No</div> <div>Lists only records without the checkbox marked.</div> </div>
ID	A unique, sequential number that is assigned when a new order is saved for the first time.
Purchase Point	Identifies the store view where the order was placed.
Purchase Date	The date the order was placed.
Bill-to Name	The name of the person who is responsible to pay for the order.
Ship-to Name	The name of the person to whom the order is to be shipped.
Grand Total (Base)	The grand total of the order.
Grand Total (Purchased)	The grand total of products purchased in the order.
Status	The current order status.
Action	The View link opens the order.

## Order Workspace

The Order workspace lists all current orders. Each row in the grid represents a customer order, and each column represents an attribute, or data field. Use the standard **controls** to sort and filter the list, find orders, and apply **actions** to selected orders. From the grid, you can view existing orders, and create new orders. The tabs above the pagination controls are used to filter the list, change the default view, change and rearrange columns, and export data.

The screenshot displays the 'Orders' workspace in a Magento system. The interface includes a sidebar with navigation icons for various sections like Dashboard, Sales, Products, Customers, Marketing, Reports, and Settings. The main content area is titled 'Orders' and features a 'Create New Order' button. Below this is a search bar and a 'Filters' button. The table below shows a list of orders with the following data:

ID	Purchase Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Action
000000001	Main Website Main Website Store English	Dec 4, 2015 11:47:28 AM	Veronica Costello	Veronica Costello	\$34.00	\$34.00	Processing	<a href="#">View</a>
000000007	Main Website Main Website Store English	Jan 9, 2016 3:47:57 PM	Jane Smith	Jane Smith	\$87.00	\$87.00	Pending	<a href="#">View</a>
000000008	Main Website Main Website Store English	Jan 9, 2016 3:54:39 PM	Claire Condra		\$63.00	\$63.00	Pending	<a href="#">View</a>
000000002	Main Website Main Website Store English	Dec 4, 2015 11:47:39 AM	Veronica Costello	Veronica Costello	\$37.00	\$37.00	Complete	<a href="#">View</a>
000000003	Main Website Main Website Store English	Dec 5, 2015 10:29:08 AM	Veronica Costello	Veronica Costello	\$107.43	\$107.43	Complete	<a href="#">View</a>

*Orders*

## Workspace Controls

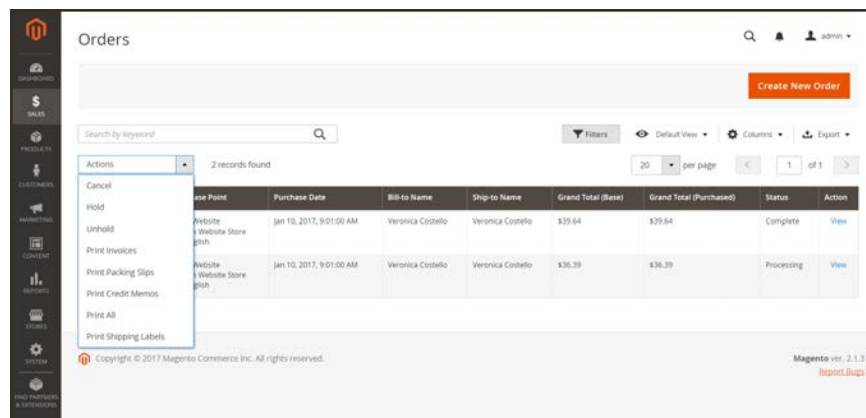
CONTROL	DESCRIPTION
Search	Initiates a search for orders based on keywords entered in the search box, and current filters.
<a href="#">Create New Order</a>	Creates a new order.
<a href="#">Go to Archive</a>	Displays the list of archived orders.
Search	Initiates a search for orders based on the current filters.
Reset Filter	Restores all filters to a blank state.
Actions	<p>Lists all actions that can be applied to selected orders. To apply an action to an order, or group of orders, mark the checkbox in the first column of each order. Order actions:</p> <ul style="list-style-type: none"> <li>Cancel</li> <li>Hold</li> <li>Unhold</li> <li>Print Invoices</li> <li>Print Packing Slips</li> <li>Print Credit Memos</li> <li>Print All</li> <li>Move to Archive</li> </ul>
Mass Actions	Can be used to select multiple records as the target of action. Mark the checkbox in the first column of each record that is subject to the action. Options: Select All, Unselect All, Select Visible, and Unselect Visible
<a href="#">Submit</a>	Applies the current action to the selected order records.
Edit	Opens the order in edit mode.

## Columns

COLUMN	DESCRIPTION
Selection State	Filters the list of orders based on checkbox status. Options: <div> <div>Any</div> <div>Lists all records, regardless of checkbox status.</div> </div> <div> <div>Yes</div> <div>Lists only records with the checkbox marked.</div> </div> <div> <div>No</div> <div>Lists only records without the checkbox marked.</div> </div>
ID	A unique, sequential number that is assigned when a new order is saved for the first time.
Purchase Point	Identifies the store view where the order was placed.
Purchase Date	The date the order was placed.
Bill-to Name	The name of the person who is responsible to pay for the order.
Ship-to Name	The name of the person to whom the order is to be shipped.
Grand Total (Base)	The grand total of the order.
Grand Total (Purchased)	The grand total of products purchased in the order.
Status	The current order status. Options:
Action	The View link opens the order.

## Order Actions

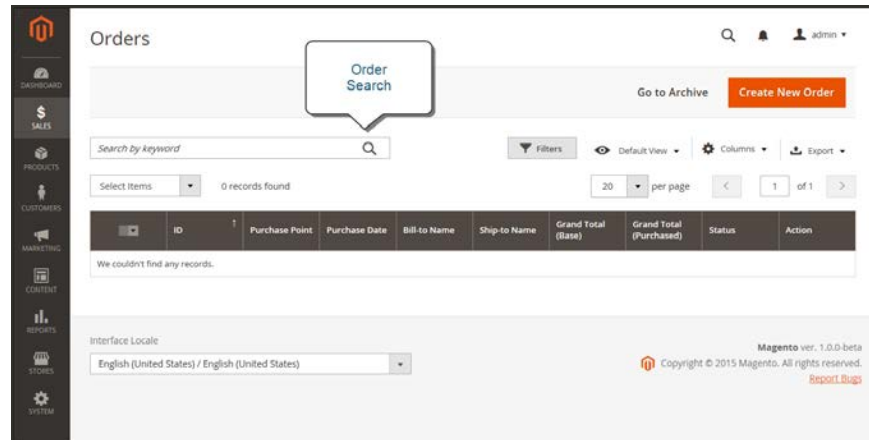
To apply an action to specific orders, mark the checkbox in the first column of each order. To select or deselect all orders, use the control at the top of the column.



*Order Actions*

## Order Search

The Search box in the upper-left of the Orders grid can be used to find specific orders by keyword, or by filtering the order records in the grid.



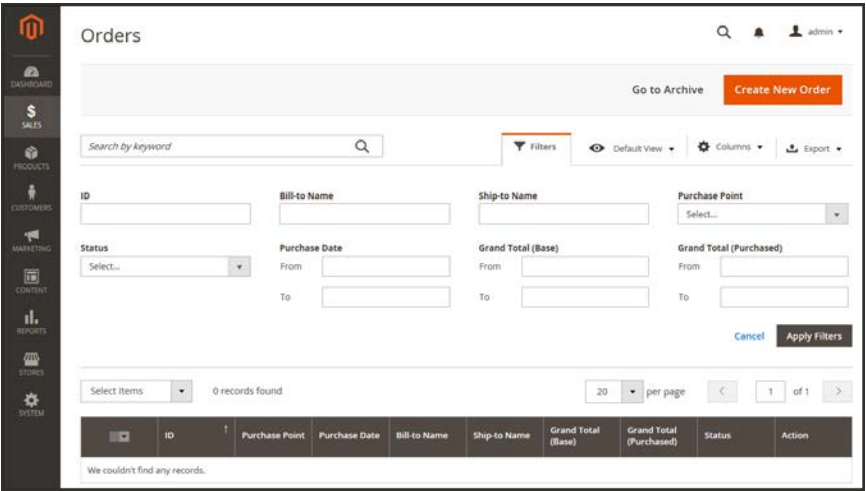
*Search Results*

### To search for a match:

1. Enter a search term into the page search box.
2. Tap **Search** (🔍) to display the results.

### To filter the search:

1. Tap the **Filters** (▼) tab to display the selection of search filters.
2. Complete as many of the filters as needed to describe the order(s) that you want to find.
3. Tap **Apply Filters** to display the results.



Order Filters

Search Filters

FILTER	DESCRIPTION
ID	Filters the search based on order ID.
Bill-to Name	Filters the search by the name of the person who is responsible to pay for the order.
Ship-to Name	Filters the search by the name of the person to whom each order is shipped .
Purchase Point	Filters the search by website, store, or store view where the order was placed.
Status	Filters the search based on order status. Options: Canceled Closed Complete Suspected Fraud On Hold Payment Review PayPal Canceled Reversal Pending Pending Payment Processing
Purchase Date	Filters the search based on the date purchased. To find orders within a range of dates, enter both the From and To dates.

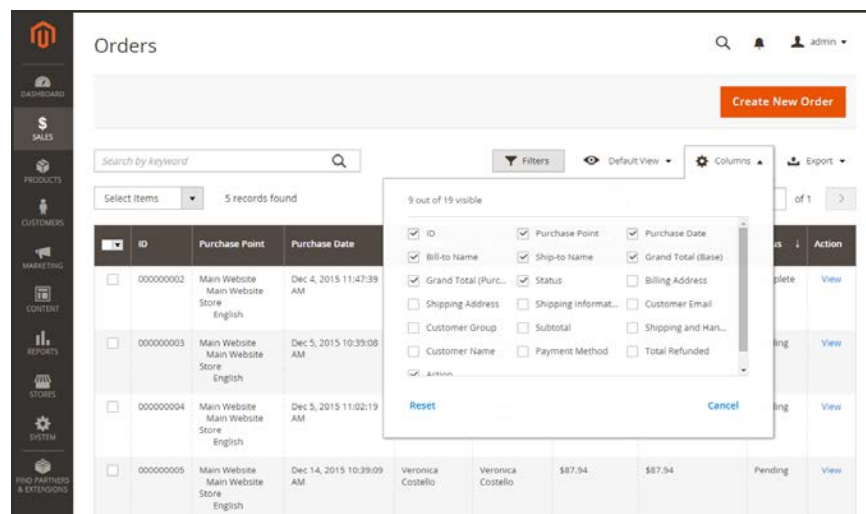


## Search Filters (cont.)

FILTER	DESCRIPTION
Grand Total (Base)	Filters the search based on the Grand Total of each order.
Grand Total (Purchased)	Filters the search based on Grand Total of items purchased in each order.
<div data-bbox="363 474 669 525">Apply Filters</div>	Applies all filters to the search.
Cancel	Cancels the current search.
Clear All	Clears all search filters.

## Order Grid Layout

The selection of columns and their order in the grid can be changed according to your preference. The new layout can be saved as a grid “view.” By default, only nine of twenty available columns are included in the grid.



*Order Grid Columns*

### To change the column selection:

In the upper-right corner, tap the **Columns** (⚙️) control. Then, do the following:


- Mark the checkbox of any column you want to add to the grid.
- Clear the checkbox of any column you want to remove from the grid.

Make sure to scroll down to see all available columns.

**To move a column:**

1. Tap the header of the column, and hold.
2. Drag the column to the new position, and release.

**To save a grid view:**

1. Tap the **View**  control. Then, tap **Save Current View**.
2. Enter a **name** for the view. Then, click the **arrow** (➔) to save all changes.

The name of the view now appears as the current view.

**To change the view:**

Tap the **View**  control. Then, do one of the following:

- To use a different view, tap the name of the view.
- To change the name of a view, tap the **Edit** (✎) icon. Then, update the name.

## Order Workflow

When a customer places an order, a sales order is created as a temporary record of the transaction. In the Orders grid, sales orders initially have a status of "Pending," and can be canceled at any time until the payment is processed. After payment is confirmed, the order can be invoiced and shipped.

1

**Place Order.** The checkout process begins when the shopper clicks the Go to Checkout button on the shopping cart page or **reorders** directly from their customer account.

2

**Order Pending.** In the Orders grid, the status of the sales order is initially "Pending." Payment has not been processed, and the order can still be canceled.

3

**Receive Payment.** The status of the order changes to "Processing." when payment is received or authorized. Depending on the payment method, you might receive notification when the transaction is authorized or processed.

4

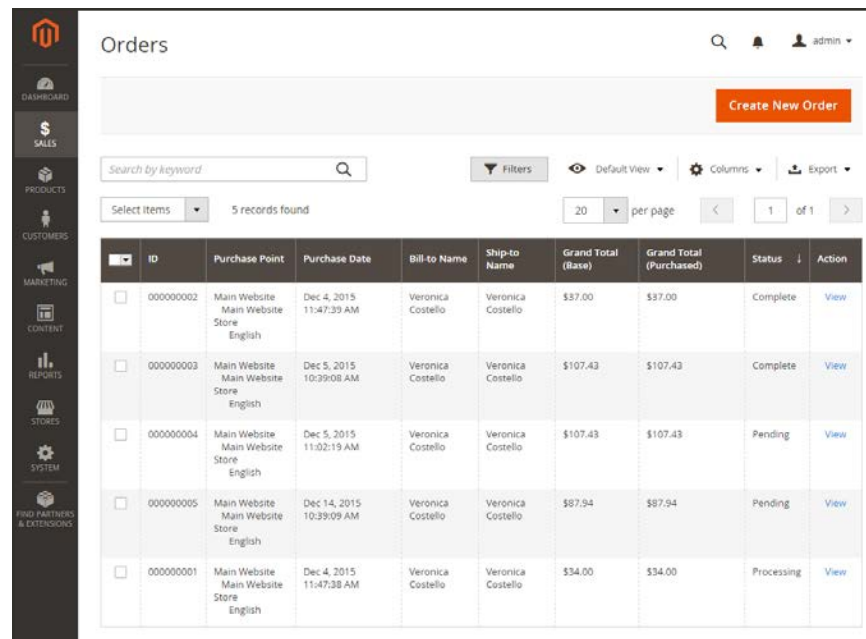
**Invoice Order.** An order is typically invoiced after payment is received. Some payment methods generate an invoice automatically when payment is authorized and captured. The payment method determines which invoicing options are needed for the order. After the invoice is generated and submitted, a copy is sent to the customer.

5

**Ship Order.** The shipment is submitted, and the packing slip and shipping label are printed. The customer receives notification, and the package is shipped. If tracking numbers are used, the shipment can be tracked from the customer's account.

## Processing Orders

When a customer places an order, a sales order is created as a temporary record of the transaction. The sales order has a status of “Pending” until payment is received. Sales orders can be canceled until an invoice is generated. An easy way to think of it is this: Orders become invoices, and invoices become shipments. The Orders grid lists all orders, regardless of where they are in the workflow.



ID	Purchase Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Action
000000002	Main Website Main Website Store English	Dec 4, 2015 11:47:39 AM	Veronica Costello	Veronica Costello	\$37.00	\$37.00	Complete	<a href="#">View</a>
000000003	Main Website Main Website Store English	Dec 5, 2015 10:39:08 AM	Veronica Costello	Veronica Costello	\$107.43	\$107.43	Complete	<a href="#">View</a>
000000004	Main Website Main Website Store English	Dec 5, 2015 11:02:19 AM	Veronica Costello	Veronica Costello	\$107.43	\$107.43	Pending	<a href="#">View</a>
000000005	Main Website Main Website Store English	Dec 14, 2015 10:39:09 AM	Veronica Costello	Veronica Costello	\$87.94	\$87.94	Pending	<a href="#">View</a>
000000001	Main Website Main Website Store English	Dec 4, 2015 11:47:38 AM	Veronica Costello	Veronica Costello	\$34.00	\$34.00	Processing	<a href="#">View</a>

*Orders*

## To view an order:

1. On the Admin sidebar, tap **Sales**. Then under **Operations**, choose **Orders**.
2. Find the order in the grid, and in the **Action** column, click **View**.
  - A pending order can be modified, put on hold, canceled, or invoiced and shipped.
  - A completed order can be reordered.

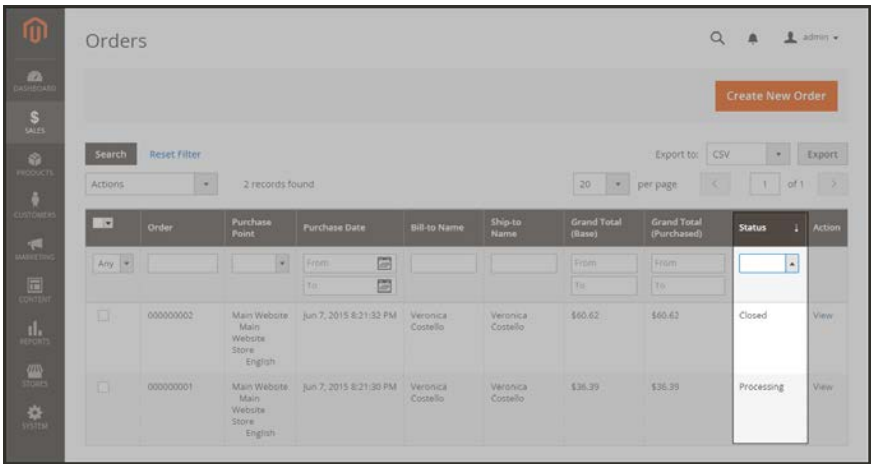
The screenshot shows the 'View Order' page in the Magento Admin interface. The top navigation bar includes a sidebar with icons for Dashboard, Sales, Products, Customers, Marketing, Content, Reports, Stores, System, and Third Parties & Extensions. The main content area is titled '#000000004' and features a search bar, a notification bell, and a user profile dropdown. Below the title is a row of action buttons: Back, Cancel, Send Email, Hold, Invoice, Ship, Reorder, and Edit. The page is divided into two main sections: 'ORDER VIEW' on the left and 'Order & Account Information' on the right. The 'ORDER VIEW' section has a sub-menu with 'Information' (selected), 'Invoices', 'Credit Memos', 'Shipments', and 'Comments History'. The 'Order & Account Information' section contains three panels: 'Order # 000000004 (The order confirmation email was sent)' with details like Order Date, Order Status, Purchased From, and Placed from IP; 'Account Information' with Customer Name, Email, and Customer Group; and 'Address Information' with Billing and Shipping addresses. The Billing and Shipping addresses are identical: Veronica Costello, 6106 Money Bluff Parkway, Calder, Michigan, 49628-7978, United States, T: (555) 229-3326.

Order & Account Information	
<b>Order # 000000004 (The order confirmation email was sent)</b>	
Order Date	Dec 5, 2015, 11:02:19 AM
Order Status	Pending
Purchased From	Main Website Main Website Store English
Placed from IP	10.237.190.43
<b>Account Information</b>	
Customer Name	Veronica Costello
Email	roni_cost@example.com
Customer Group	General
<b>Address Information</b>	
<b>Billing Address</b> <a href="#">Edit</a>	
Veronica Costello 6106 Money Bluff Parkway Calder, Michigan, 49628-7978 United States T: (555) 229-3326	
<b>Shipping Address</b> <a href="#">Edit</a>	
Veronica Costello 6106 Money Bluff Parkway Calder, Michigan, 49628-7978 United States T: (555) 229-3326	

*View Order*

# Order Status

All orders have an order status that is associated with a stage in the order processing **workflow**. The status of each order is shown in the Status column of the Orders grid. Your store has a set of predefined order status and order state settings. The order state describes the position of an order in the **workflow**.

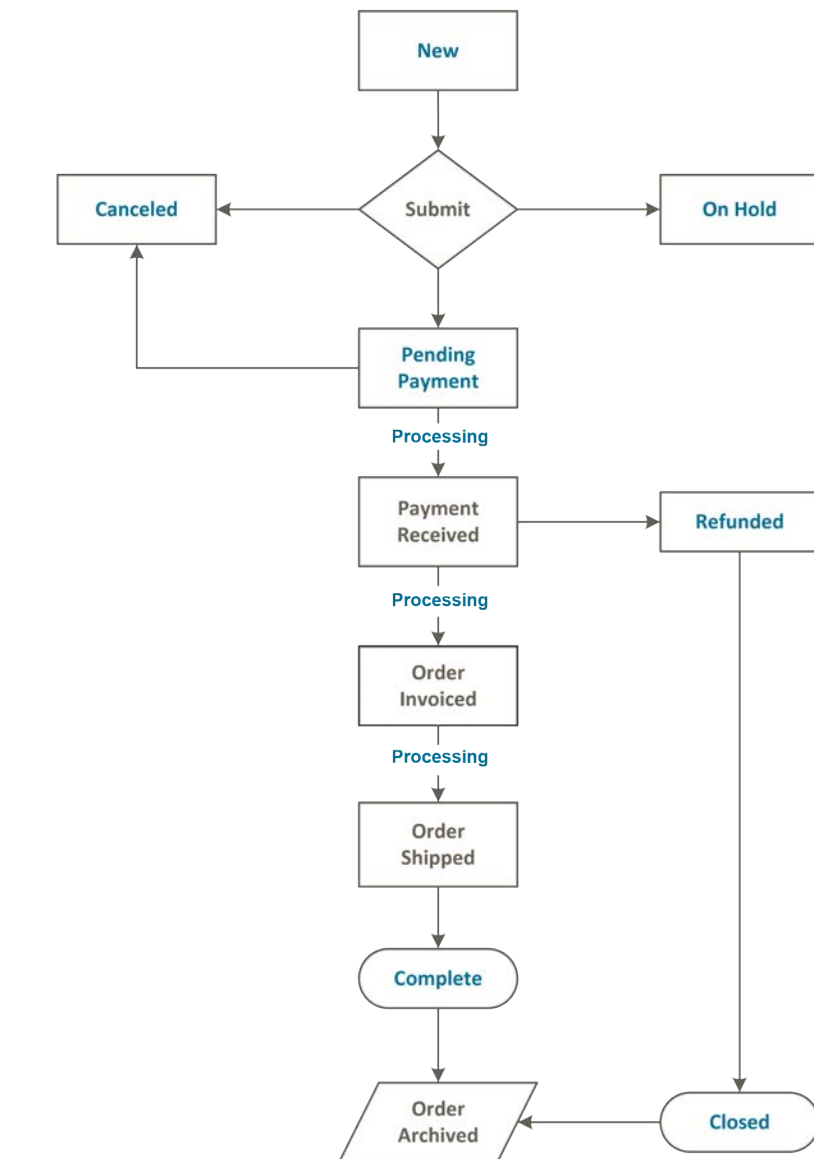


Order Status

## Predefined Order Status

ORDER STATUS	STATUS CODE
Processing	processing
Suspected Fraud	fraud
Pending Payment	pending_payment
Payment Review	payment_review
Pending	pending
On Hold	holded
Complete	complete
Closed	closed
Canceled	canceled
PayPal Canceled Reversal	paypal_canceled_reversal
Pending PayPal	pending_paypal
PayPal Reversed	paypal_reversed

## Order Status Workflow



# Custom Order Status

In addition to the preset order status settings, you can create custom order status settings of your own, assign them to order states, and set a default order status for order states. For example, you might need a custom order status for orders such as “packaging” or “backordered,” or for a status that is specific to your needs. You can create a descriptive name for the custom status, and assign it to the associated order state in the workflow.

Only default custom order status values are used in the order workflow. Custom status values that are not set as default can be used only in the comments section of the order.

Dashboard

Sales

Products

Customers

Marketing

Content

Reports

Stores

System

Find Partners & Extensions

Order Status

Assign Status to State

Create New Status

Search

Reset Filter

13 records found

Status	Status Code	Default Status	Visible On Storefront	State Code and Title	Action
Processing	processing	Yes	Yes	processing[Suspected Fraud]	Unassign
Suspected Fraud	fraud	No	Yes	processing[Suspected Fraud]	Unassign
Pending Payment	pending_payment	Yes	No	pending_payment[Pending Payment]	Unassign
Payment Review	payment_review	Yes	Yes	payment_review[Suspected Fraud]	Unassign
Suspected Fraud	fraud	No	Yes	payment_review[Suspected Fraud]	Unassign
Pending	pending	Yes	Yes	next[Pending]	Unassign
On Hold	holded	Yes	Yes	holded[On Hold]	Unassign
Complete	complete	Yes	Yes	complete[Complete]	Unassign
Closed	closed	Yes	Yes	closed[Closed]	Unassign
Canceled	canceled	Yes	Yes	canceled[Canceled]	Unassign
Pending PayPal	paypal_paypal				
PayPal Reversed	paypal_reversed				
PayPal Canceled Reversal	paypal_canceled_reversal				

Order Status Settings



### To create a custom order status:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Order Status**.
2. In the upper-right corner, tap **Create New Status**.

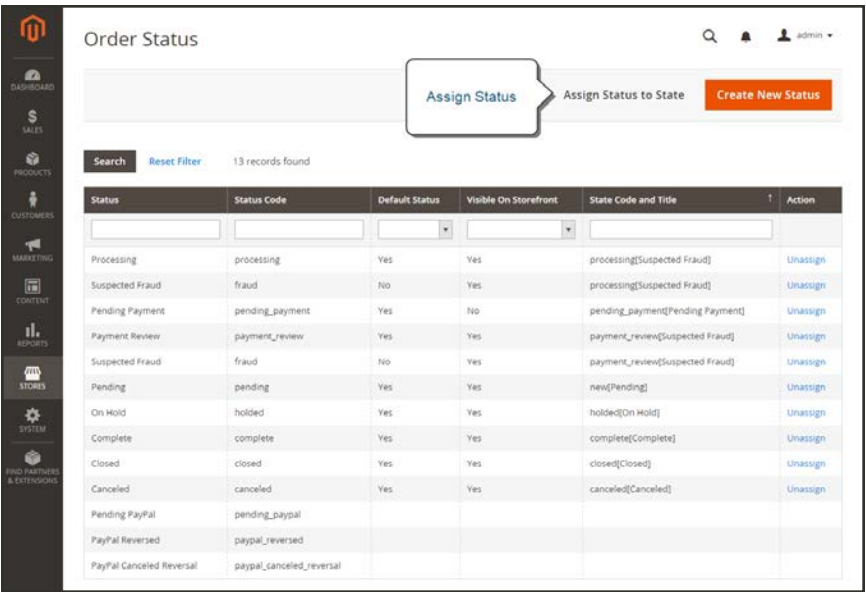
The screenshot shows the 'Create New Order Status' form. The sidebar on the left contains icons for various Magento sections. The main content area has a title 'Create New Order Status' and a top bar with 'Back', 'Reset', and 'Save Status' buttons. The form is divided into two main sections: 'Order Status Information' and 'Store View Specific Labels'. The 'Order Status Information' section has two input fields: 'Status Code' and 'Status Label'. The 'Store View Specific Labels' section has a question mark icon and four input fields for 'Main Website' and 'Main Website Store' in English, French, German, and Spanish.

*Create New Order Status*

3. Under Order Status Information section, do the following:
  - a. Enter a **Status Code** for internal reference. The first character must be a letter (a-z), and the rest can be any combination of letters and numbers (0-9). Use the underscore character instead of a space.
  - b. Enter a **Status Label** to identify the status setting in both the Admin and storefront.
4. In the **Store View Specific Labels** section, enter any labels that are needed for different store views.
5. When complete, tap **Save Status**.

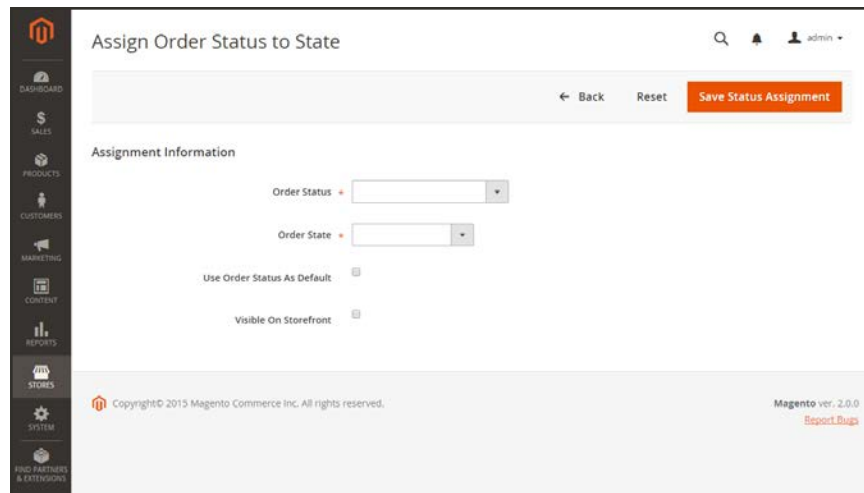
To assign an order status to a state:

1. On the Order Status page, tap **Assign Status to State**.



Assign Status

2. In the **Assignment Information** section, do the following:
- a. Choose the **Order Status** that you want to assign. They are listed by status label.
  - b. Set **Order State** to the place in the workflow where the order status belongs.
  - c. To make this status the default for the order state, mark the **Use Order Status as Default** checkbox.
  - d. To make this status visible from the storefront, mark the **Visible On Storefront** checkbox.



*Assign Status to State*

3. When complete, tap **Save Status Assignment**.

### To edit an existing order status:

1. In the Order Status grid, open the status record in edit mode.
2. Update the status settings as needed.
3. When complete, tap **Save Status**.

### To remove an order status from an assigned state:

A status setting cannot be unassigned from a state if the status is currently in use.

1. In the Order Status grid, find the order status record to be unassigned.
2. In the **Action** column on the far right of the row, tap the **Unassign** link.

A message appears at the top of the workspace that the order status has been unassigned. Although the order status label still appears in the list, it is no longer assigned to a state. Order status settings cannot be deleted.

### Order State

#### ORDER STATE

New

Pending Payment

## Order State (cont.)

### ORDER STATE

Processing	When the state of new orders is set to “Processing,” the option to “Automatically Invoice All Items” becomes available in the configuration.
Complete	
Closed	
Canceled	
On Hold	
Payment Review	

## Order Status Notification

Customers can track the status of their orders by **RSS feed** if the Order RSS feed is enabled in the configuration. When enabled, a link to the RSS feed appears on each order.

A screenshot of a configuration panel titled "Order". Inside the panel, there is a label "Customer Order Status Notification" followed by a dropdown menu currently set to "Enable". To the right of the dropdown is a link labeled "[STORE VIEW]". A close button (X icon) is located in the top right corner of the panel.

### *Customer Order Status Notification*

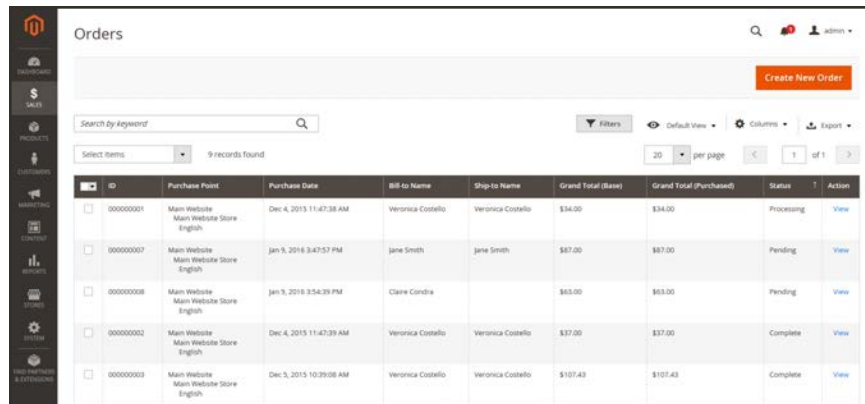
#### To enable Order Status Notification:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Catalog**, choose **RSS Feeds**.
3. Expand ☑ the **Order** section.
4. Set **Customer Order Status Notification** to “Enable”.
5. When complete, tap **Save Config**.

## Scheduled Operations

Magento **cron** jobs can be used to schedule the following order management tasks:

- Pending Payment Order Lifetime
- Scheduled Grid Updates



The screenshot shows the 'Orders' grid in the Magento Admin interface. It includes a search bar, filters, and a table of orders. The table has columns for ID, Purchase Point, Purchase Date, Bill-to Name, Ship-to Name, Grand Total (Base), Grand Total (Purchased), Status, and Action. The status of the orders is 'Processing', 'Pending', and 'Complete'.

ID	Purchase Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Action
00000001	Main Website Main Website Store English	Dec 4, 2015 11:47:38 AM	Veronica Costello	Veronica Costello	\$34.00	\$34.00	Processing	<a href="#">View</a>
00000007	Main Website Main Website Store English	Jan 5, 2016 3:47:57 PM	Jane Smith	Jane Smith	\$67.00	\$67.00	Pending	<a href="#">View</a>
00000008	Main Website Main Website Store English	Jan 5, 2016 3:54:39 PM	Clare Cordra		\$63.00	\$63.00	Pending	<a href="#">View</a>
00000002	Main Website Main Website Store English	Dec 4, 2015 11:47:39 AM	Veronica Costello	Veronica Costello	\$37.00	\$37.00	Complete	<a href="#">View</a>
00000003	Main Website Main Website Store English	Dec 3, 2015 10:39:08 AM	Veronica Costello	Veronica Costello	\$107.43	\$107.43	Complete	<a href="#">View</a>

*Orders Grid with Pending Orders*

## Pending Payment Order Lifetime

The lifetime of orders with pending payments is determined by the Orders Cron Settings configuration. The default value is set to 480 minutes, which is eight hours.

### To set the lifetime of orders with pending payments:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Sales**.
3. Expand ☺ the **Orders Cron Settings** section.



The screenshot shows the 'Orders Cron Settings' configuration panel. It includes a field for 'Pending Payment Order Lifetime (minutes)' with a value of 480, and a checkbox for 'Use system value' which is checked.

Field	Value
Pending Payment Order Lifetime (minutes)	480
Use system value	<input checked="" type="checkbox"/>

*Orders Cron Settings*

4. In the **Pending Payment Order Lifetime (minutes)** field, enter the number of minutes before a pending payment expires.
5. When complete, tap **Save Config**.

## Scheduled Grid Updates

The Grid Settings configuration schedules updates to the following order management grids, and reindexes the data as scheduled by **Cron**:

- **Orders**
- **Invoices**
- **Shipments**
- **Credit Memos**

The benefits of scheduling these tasks is to avoid the locks that occur when data is saved, and to reduce processing time. When enabled, any updates take place only during the scheduled cron job. For best results, Cron should be configured to run once every minute.

### To enable scheduled grid updates and reindexing:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **Developer**.
3. Expand ☑ the **Grid Settings** section.
4. Set **Asynchronous Indexing** to “Enable.”



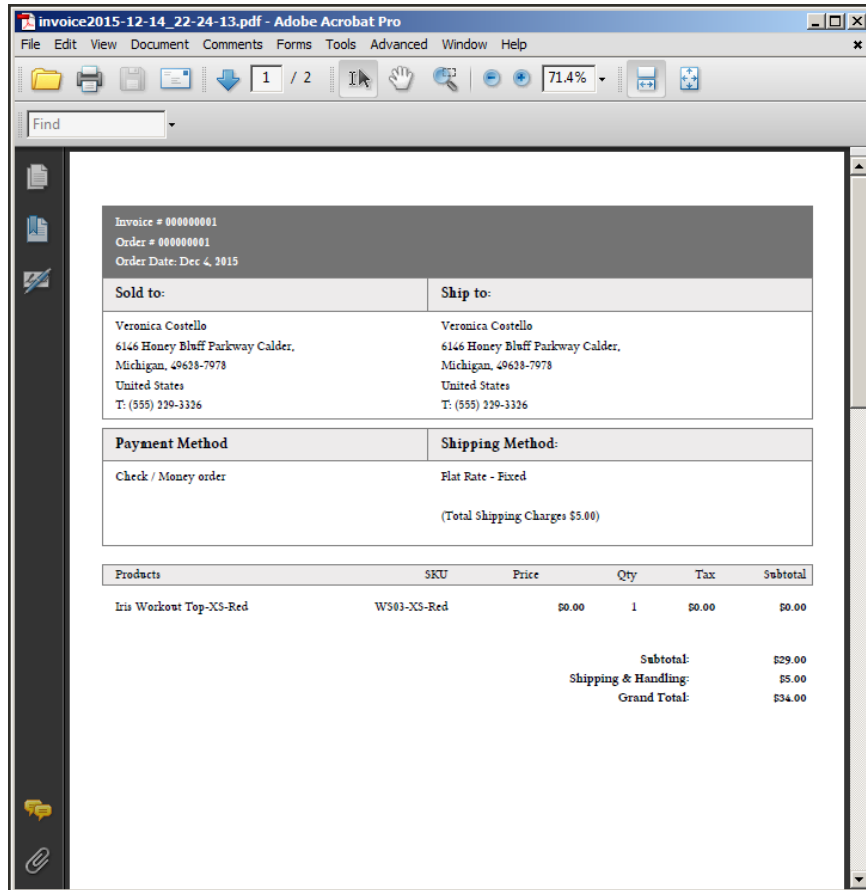
*Grid Settings*

5. When complete, tap **Save Config**.

## CHAPTER 59:

# Invoices

An invoice is a record of the record of payment for an order. Multiple invoices can be created for a single order, and each can include as many or as few of the purchased products that you specify. You can upload a high-resolution logo for a print-ready PDF invoice, and include the **Order ID** in the header. To customize the invoice template with your logo, see: [Preparing Your Invoice Logo](#).



invoice2015-12-14\_22-24-13.pdf - Adobe Acrobat Pro

File Edit View Document Comments Forms Tools Advanced Window Help

Find

Invoice # 000000001  
Order # 000000001  
Order Date: Dec 4, 2015

<b>Sold to:</b>	<b>Ship to:</b>
Veronica Costello 6146 Honey Bluff Parkway Calder, Michigan, 49638-7978 United States T: (555) 230-3326	Veronica Costello 6146 Honey Bluff Parkway Calder, Michigan, 49638-7978 United States T: (555) 230-3326

<b>Payment Method:</b>	<b>Shipping Method:</b>
Check / Money order	Flat Rate - Fixed (Total Shipping Charges \$5.00)

Products	SKU	Price	Qty	Tax	Subtotal
Iris Workout Top-XS-Red	WS03-XS-Red	\$0.00	1	\$0.00	\$0.00
<b>Subtotal:</b>					\$29.00
<b>Shipping &amp; Handling:</b>					\$5.00
<b>Grand Total:</b>					\$34.00

PDF Invoice

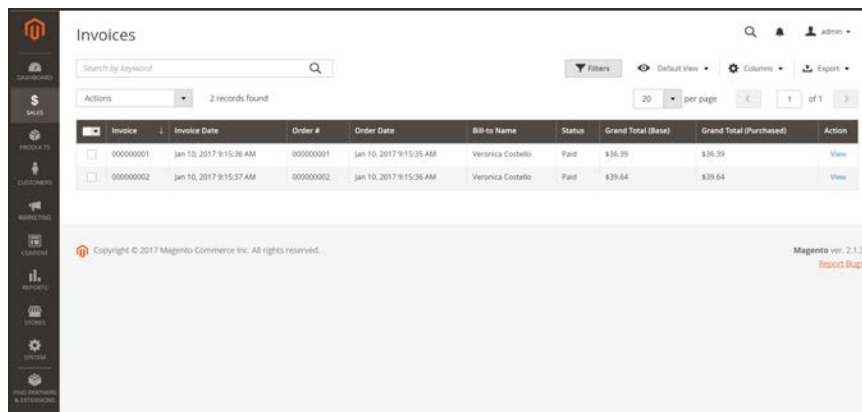
## Creating an Invoice

Creating an invoice for an order converts the temporary sales order into a permanent record of the order that cannot be canceled. A new invoice page looks similar to a completed order, with some additional fields. Every activity that is related to an order is noted in the Comments section of the invoice.

Normally, orders are invoiced and shipped after payment is received. However, if the method of payment is a purchase order, the order can be invoiced and shipped before payment is received. You can generate an invoice with a packing slip, and also print shipping labels from your carrier account. A single order can be divided into partial shipments which are invoiced separately, if necessary.

When the state of new orders is set to “Processing,” the option to “Automatically Invoice All Items” becomes available in the configuration. Some credit card payment methods complete the invoicing step as part of the process when Payment Action is set to “Authorize and Capture.” In such a case, the Invoice button does not appear, and the order is ready to ship.

Before an invoice can be printed, it must first be generated for the order. To view or print the PDF, first download and install a PDF reader such as [Adobe Acrobat Reader](#).



The screenshot shows the 'Invoices' management page in a Magento system. It includes a search bar, filters, and a table of invoice records. The table has columns for Invoice, Invoice Date, Order #, Order Date, Bill-to Name, Status, Grand Total (Base), Grand Total (Purchased), and Action. Two records are listed, both with a status of 'Paid'.

Invoice	Invoice Date	Order #	Order Date	Bill-to Name	Status	Grand Total (Base)	Grand Total (Purchased)	Action
<input type="checkbox"/> 000000001	Jan 10, 2017 9:15:36 AM	000000001	Jan 10, 2017 9:15:35 AM	Veronica Costello	Paid	\$36.39	\$36.39	<a href="#">View</a>
<input type="checkbox"/> 000000002	Jan 10, 2017 9:15:37 AM	000000002	Jan 10, 2017 9:15:36 AM	Veronica Costello	Paid	\$39.64	\$39.64	<a href="#">View</a>

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*Invoices*



## To invoice an order:

1. On the Admin sidebar, tap **Sales**. Then under **Operations**, choose **Orders**.
2. Find the order in the grid, and do the following:
  - a. In the **Action** column, click the **View** link.
  - b. In the upper-right corner, tap **Invoice**. The new invoice page looks similar to a completed order page, with additional fields that can be edited.

The Invoice button does not appear for orders placed with the “Authorize and Capture” payment action.

3. If the items are ready to ship, you can generate a packing slip for the shipment at the same time you create the invoice. To create a packing slip, do the following:
  - a. In the **Shipping Information** section, mark the **Create Shipment** checkbox. A shipment record will be created at the same time the invoice is generated.

The screenshot shows the 'Payment & Shipping Method' section. On the left, under 'Payment Information', it says 'Check / Money order' and 'The order was placed using USD.' On the right, under 'Shipping Information', it shows 'Best Way - Table Rate' and 'Total Shipping Charges: \$10.00'. There is a checkbox labeled 'Create Shipment' which is checked. A blue callout bubble points to a 'Create Shipment' button. Below the checkbox is a table with the following structure:

Carrier	Title	Number	Action
Add Tracking Number			

### Create Shipment

- b. To include a tracking number, tap **Add Tracking Number**. Then, enter the following:
  - Carrier
  - Title
  - Number

- c. If you need to generate a partial invoice, do the following:

In the **Items to Invoice** section, update the **Qty to Invoice** column to include only specific items on the invoice. Then, tap **Update Qty's**.

Items to Invoice							
Product	Price	Qty	Qty to Invoice	Subtotal	Tax Amount	Discount Amount	Row Total
Overnight Duffie SKU: 24-WS07	\$45.00	Ordered 1	<input type="text" value="1"/>	\$45.00	\$3.71	\$0.00	\$48.71
Affirm Water Bottle SKU: 24-UG06	\$7.00	Ordered 1	<input type="text" value="1"/>	\$7.00	\$0.58	\$0.00	\$7.58
Harmony Lumaflex™ Strength Band Kit SKU: 24-UG03	\$22.00	Ordered 1	<input type="text" value="1"/>	\$22.00	\$1.82	\$0.00	\$23.82
Pursuit Lumaflex™ Tone Band SKU: 24-UG02	\$16.00	Ordered 1	<input type="text" value="1"/>	\$16.00	\$1.32	\$0.00	\$17.32
<input type="button" value="Update Qty's"/>							

*Items to Invoice*

4. If an online payment method was used for the order, set **Amount** to the appropriate option.
5. To notify customers by email when the invoice is generated, do the following:
  - a. Mark the **Email Copy of Invoice** checkbox.
  - b. Enter any **Invoice Comments**. To include the comments in the notification email, mark the **Append Comments** checkbox.
6. When complete, tap **Submit Invoice** at the bottom of the page. The status of the order changes from "Pending" to "Complete."

Order Total									
Invoice History Invoice Comments <input type="text"/>	<b>Invoice Totals</b> <table> <tr> <td>Subtotal</td> <td>\$90.00</td> </tr> <tr> <td>Shipping &amp; Handling</td> <td>\$10.00</td> </tr> <tr> <td>Tax</td> <td>\$7.43</td> </tr> <tr> <td><b>Grand Total</b></td> <td><b>\$107.43</b></td> </tr> </table> <input checked="" type="checkbox"/> Append Comments <input checked="" type="checkbox"/> Email Copy of Invoice	Subtotal	\$90.00	Shipping & Handling	\$10.00	Tax	\$7.43	<b>Grand Total</b>	<b>\$107.43</b>
Subtotal	\$90.00								
Shipping & Handling	\$10.00								
Tax	\$7.43								
<b>Grand Total</b>	<b>\$107.43</b>								
<input type="button" value="Submit Invoice"/>									

*Submit Invoice*

#000000006

[← Back](#)[Send](#)

## Order & Account Information

**Order # 000000006** (The order confirmation email was sent)

Order Date Dec 16, 2015, 2:59:10 PM

Order Status Complete

Purchased From Main Website  
Main Website Store  
English

Placed from IP 10.237.184.95

## Account Information

Customer Name

Email

Customer Group

## Address Information

### Billing Address [Edit](#)

Jane Smith  
10441 Jefferson Blvd, Suite 200  
Culver City, California, 90232  
United States  
T: (000) 123-4567

### Shipping Address [Edit](#)

Jane Smith  
10441 Jefferson Blvd, Suite 200  
Culver City, California, 90232  
United States  
T: (000) 123-4567

## Payment & Shipping Method

### Payment Information

Magento Commerce User Guide

Check / Money order

The order was placed using USD

### Shipping Information

cmxxxii

**Best Way - Table Rate**

Total Shipping Charges: **\$10.00**



## To print the invoice:

1. At the top of the workspace, tap **Print** to generate a PDF of the invoice
2. Do one of the following:
  - Send the PDF invoice to a printer.
  - Save the PDF file.

To customize the default invoice, see: [Preparing Your Invoice Logo](#).

invoice2015-12-14\_22-09-06.pdf - Adobe Acrobat Pro

File Edit View Document Comments Forms Tools Advanced Window Help

Find

Invoice # 000000003  
Order # 000000003  
Order Date: Dec 5, 2015

Sold to:	Ship to:
Veronica Costello 6146 Honey Bluff Parkway Calder, Michigan, 49628-7978 United States T: (555) 239-3326	Veronica Costello 6146 Honey Bluff Parkway Calder, Michigan, 49628-7978 United States T: (555) 239-3326

Payment Method	Shipping Method:
Check / Money order	Best Way - Table Rate (Total Shipping Charges \$10.00)

Products	SKU	Price	Qty	Tax	Subtotal
Overnight Duffie	24-WB07	\$45.00	1	\$3.71	\$45.00
Affirm Water Bottle	24-UG06	\$7.00	1	\$0.58	\$7.00
Harmony Lumaflex®trade, Strength Band Kit	24-UG03	\$22.00	1	\$1.82	\$22.00
Pursuit Lumaflex®trade, Tone Band	24-UG03	\$16.00	1	\$1.32	\$16.00
Subtotal:					\$90.00
Tax:					\$7.43
Shipping & Handling:					\$10.00
Grand Total:					\$107.43

*Default PDF Invoice*

## Payment Actions

PAYMENT ACTION	DESCRIPTION
Capture Online	Upon invoice submission, the system captures the payment from the third-party payment gateway. You have the ability to create a credit memo and void the invoice.
Capture Offline	Upon invoice submission, the system does not capture the payment. It is assumed that the payment is captured directly through the gateway, and you no longer have the option to capture this payment through Magento. You have the ability to create a credit memo, but you do not have the option to void the invoice. (Even though the order used an online payment, the invoice is essentially an offline invoice.)
Not Capture	<p>When the invoice is submitted, the system does not capture the payment. It is assumed that you will capture the payment through Magento at a later date. There is a Capture button in the completed invoice. Before capturing, you are able to cancel the invoice. After capturing you are able to create a credit memo and void the invoice.</p> <div><p>Do not select Not Capture unless you are certain that you are going to capture the payment through Magento at a later date. You will not be able to create a credit memo until the payment has been captured using the Capture button.</p></div>

## Printing Multiple Invoices

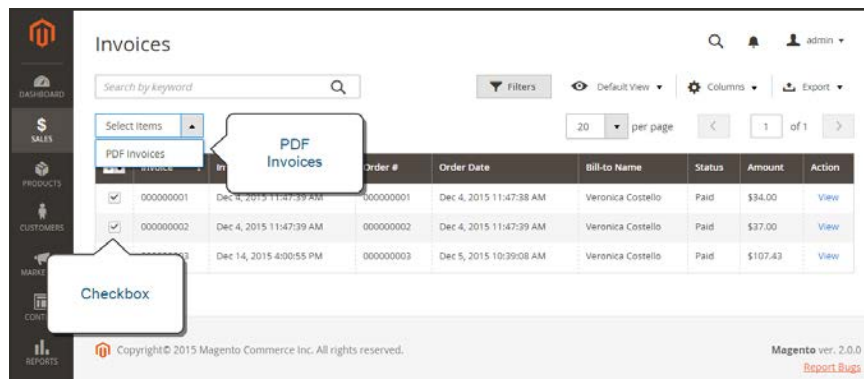
Invoices can be printed individually or as a batch. However, before an invoice can be printed, it must first be generated for the order. To add your logo and address to the invoice, see:

[Preparing Your Invoice Logo.](#)

To view or print the PDF, you must have a PDF reader. You can download [Adobe Reader](#) at no charge.

### To print multiple invoices:

1. On the Admin sidebar, tap **Sales**. Then under **Operations**, choose **Invoices**.
2. In the **Invoices** grid, mark the checkbox of each invoice to be printed.
3. Set the **Actions** control to “PDF Invoices.”



### *Print Invoices*

The invoices are saved in a single PDF file that can be sent to a printer, or saved.

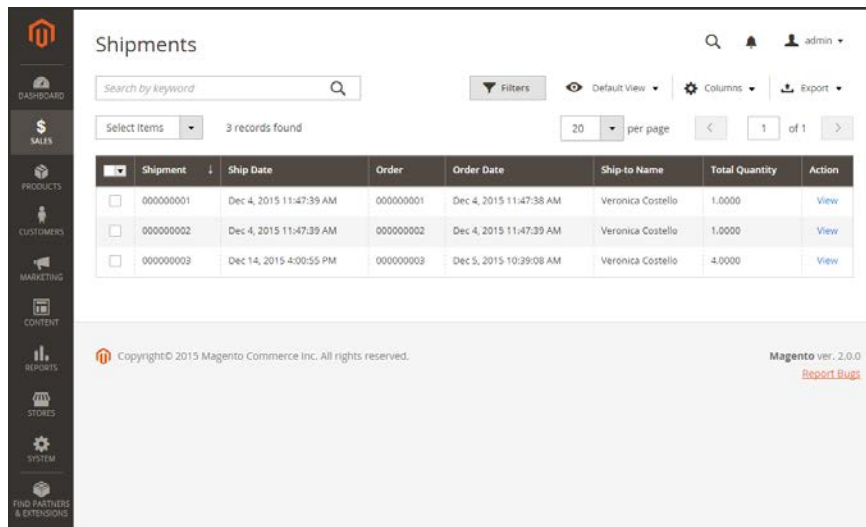




## CHAPTER 60:

# Shipments

The Shipments grid lists the shipment record of all invoices that have been prepared for shipping. A shipment record can be generated when an order is **invoiced**.



The screenshot shows the Magento Admin interface for the Shipments section. On the left is a sidebar with navigation links: Dashboard, Sales, Products, Customers, Marketing, Content, Reports, Stores, System, and Find Partners & Extensions. The main content area is titled 'Shipments' and includes a search bar, filters, and a table of shipment records. The table has columns for Shipment, Ship Date, Order, Order Date, Ship to Name, Total Quantity, and Action. There are three records listed, all for 'Veronica Costello'. The footer shows 'Copyright © 2015 Magento Commerce Inc. All rights reserved.' and 'Magento ver. 2.0.0' with a 'Report Bugs' link.

Shipment	Ship Date	Order	Order Date	Ship to Name	Total Quantity	Action
<input type="checkbox"/> 000000001	Dec 4, 2015 11:47:39 AM	000000001	Dec 4, 2015 11:47:38 AM	Veronica Costello	1.0000	<a href="#">View</a>
<input type="checkbox"/> 000000002	Dec 4, 2015 11:47:39 AM	000000002	Dec 4, 2015 11:47:39 AM	Veronica Costello	1.0000	<a href="#">View</a>
<input type="checkbox"/> 000000003	Dec 14, 2015 4:00:55 PM	000000003	Dec 5, 2015 10:39:08 AM	Veronica Costello	4.0000	<a href="#">View</a>

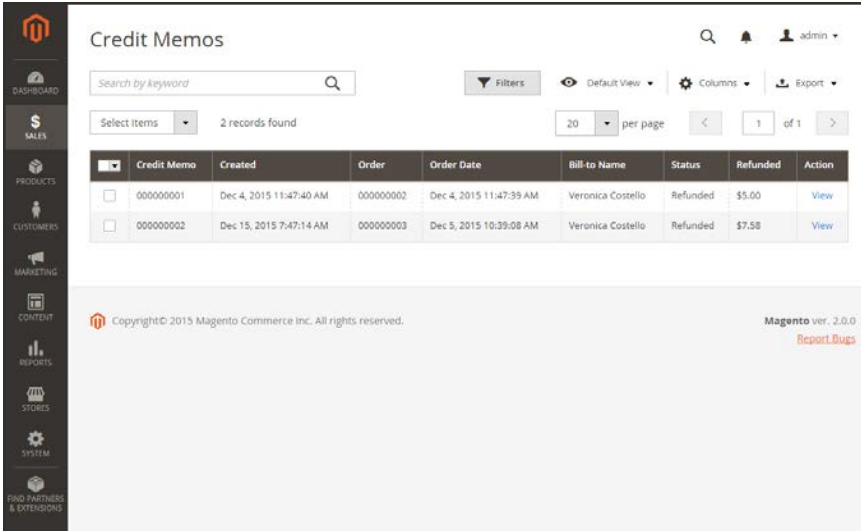
*Shipments*



## CHAPTER 61:

# Credit Memos

A credit memo is a document that shows the amount that is owed to the customer. The amount can be applied toward a purchase, or refunded to the customer. You can print a credit memo for a single order, or for multiple orders as a batch. Before a credit memo can be printed, it must first be generated for the order. The credit memo grid lists the credit memos that have been issued. to customers.



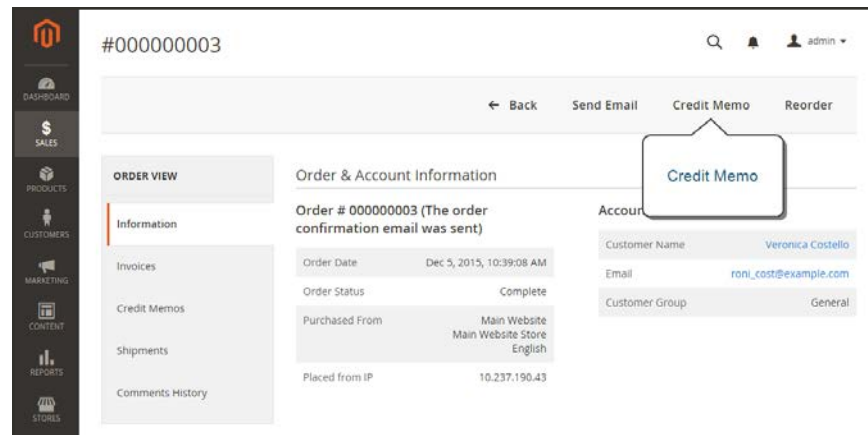
The screenshot shows the 'Credit Memos' page in the Magento admin interface. It includes a search bar, filters, and a table with two records. The table columns are: Credit Memo, Created, Order, Order Date, Bill-to Name, Status, Refunded, and Action. The first record has a credit memo number of 000000001, created on Dec 4, 2015, for order 000000002, with a refunded amount of \$5.00. The second record has a credit memo number of 000000002, created on Dec 15, 2015, for order 000000003, with a refunded amount of \$7.58. Both records are for 'Veronica Costello' and have a status of 'Refunded'.

	Credit Memo	Created	Order	Order Date	Bill-to Name	Status	Refunded	Action
<input type="checkbox"/>	000000001	Dec 4, 2015 11:47:40 AM	000000002	Dec 4, 2015 11:47:39 AM	Veronica Costello	Refunded	\$5.00	<a href="#">View</a>
<input type="checkbox"/>	000000002	Dec 15, 2015 7:47:14 AM	000000003	Dec 5, 2015 10:39:08 AM	Veronica Costello	Refunded	\$7.58	<a href="#">View</a>

*Credit Memos*

### To create a credit memo:

1. On the Admin sidebar tap **Sales**. Then under Operations, choose **Orders**.
2. Find the completed order in the grid. Then in the **Action** column, click the **View** link to open the order.
3. In the upper right corner, tap **Credit Memo**. (The button appears only after an order is invoiced.)



#### Create Credit Memo

The New Credit Memo page looks similar to the completed order page, with an Items to Refund section that lists each item from the invoice.

Product	Price	Qty	Return to Stock	Qty to Refund	Subtotal	Tax Amount	Discount Amount	Row Total
Overnight Duffie SKU: 24-WB07	\$45.00	Ordered 1 Invoiced 1 Shipped 1	<input type="checkbox"/>	0	\$45.00	\$3.71	\$0.00	\$48.71
Affirm Water Bottle SKU: 24-UG06	\$7.00	Ordered 1 Invoiced 1 Shipped 1	<input checked="" type="checkbox"/>	1	\$7.00	\$0.58	\$0.00	\$7.58
Harmony Lumaflex™ Strength Band Kit SKU: 24-UG03	\$22.00	Ordered 1 Invoiced 1 Shipped 1	<input type="checkbox"/>	0	\$22.00	\$1.82	\$0.00	\$23.82
Pursuit Lumaflex™ Tone Band SKU: 24-UG02	\$16.00	Ordered 1 Invoiced 1 Shipped 1	<input type="checkbox"/>	0	\$16.00	\$1.32	\$0.00	\$17.32

Update Qty's

#### Items to Refund

If an online payment method was used, you will not be able to edit these fields.

4. Do one of the following:
  - If the product is to be returned to inventory, mark the **Return to Stock** checkbox.
  - If the product will not be returned to inventory, leave the checkbox blank.

The Return to Stock checkbox appears only if inventory Stock Options are set to “Decrease Stock When Order Is Placed.”

5. Complete the following:
  - a. In the **Qty to Refund** box, enter the number of items to be returned. Then, press the **Enter** key to record the change. The Update Qty's button becomes active.
  - b. Enter **0** for the **Qty to Refund** of any items that are not to be refunded.
  - c. Tap **Update Qty's** to recalculate the total. (The amount to be credited cannot exceed the maximum amount that is available for refund.)
6. In the **Refund Totals** section, do the following, as applicable:
  - a. In the **Refund Shipping** field, enter any amount that is to be refunded from the shipping fee. This field initially displays the total shipping amount from the order that is available for refund. It is equal to the full shipping amount from the order, less any shipping amount that has already been refunded. Like the quantity, the amount can be reduced, but not increased.
  - b. In the **Adjustment Refund** field, enter a value to be added to the total amount refunded as an additional refund that does not apply to any particular part of the order (shipping, items, or tax). The amount entered cannot raise the total refund higher than the paid amount.
  - c. In the **Adjustment Fee** field, enter a value to be subtracted from the total amount refunded. This amount is not subtracted from a specific section of the order such as shipping, items, or tax.
  - d. If the purchase was paid with store credit, mark the **Refund to Store Credit** checkbox. The amount will be credited to the customer's account balance.
  - e. To add a comment, enter the text in the **Credit Memo Comments** box.
  - f. To send an email notification to the customer, mark the **Email Copy of Credit Memo** checkbox.
  - g. To include the comments you have entered in the email, mark the **Append Comments** checkbox.

The status of a credit memo notification appears in the completed credit memo next to the credit memo number.
7. To complete the process and generate the credit memo, choose one of the following refund option buttons, according to the payment type:
  - Refund Offline
  - Refund Online
8. To add a comment to the completed credit memo, scroll down to the Comments History section, and enter the comment in the box. A history of all activity related to the order is listed below.

- To send the comment to the customer by email, mark the **Notify Customer by Email** checkbox.
- To post the comment in the customer's account, mark the **Visible on Frontend** checkbox.

Then, tap **Submit Comment**.

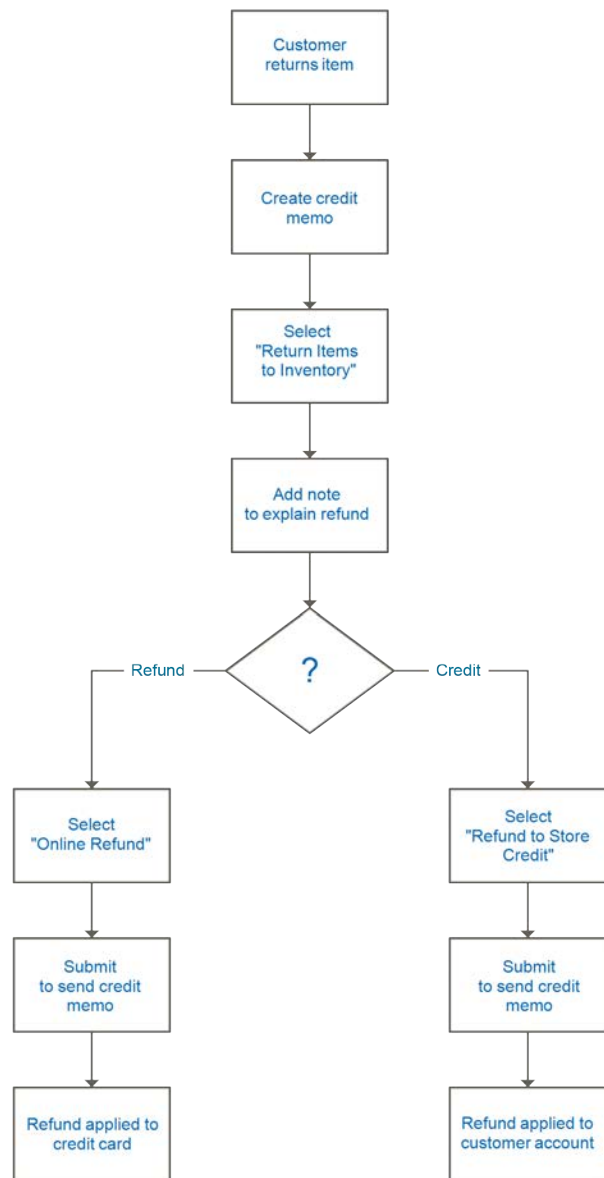
9. In the panel on the left, choose **Credit Memos**. Any credit memos that are associated with this order appear in the list.

The screenshot shows the 'Credit Memos' section for order #000000003. The interface includes a sidebar with navigation options and a main content area with a table of credit memos.

	Credit Memo	Created	Order	Order Date	Bill-to Name	Status	Refunded	Action
<input type="checkbox"/>	000000002	Dec 15, 2015 7:47:14 AM	000000003	Dec 5, 2015 10:39:08 AM	Veronica Costello	Refunded	\$7.58	<a href="#">View</a>

*Completed Credit Memo*

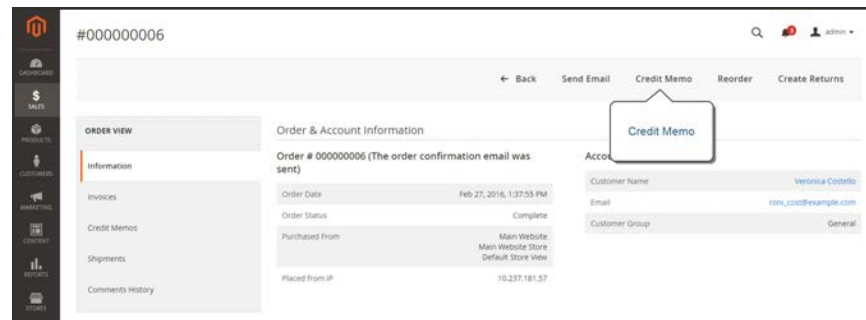
## Product Return Workflow



*Product Return Workflow*

## Issuing a Credit Memo

Before a credit memo can be printed, it must first be generated for the order. If you create a credit memo for an order that includes gift options, the refund for the gift wrapping and/or printed card appears in the Refund Totals section of the credit memo. To exclude these costs from the amount to be refunded, enter the amount as an Adjustment Fee. If multiple credit memos are issued for the same order, the refund for gift options appears in the first credit memo.



*Create Credit Memo*

### To issue a credit memo:

1. On the Admin sidebar, tap **Sales**. Then under **Operations**, choose **Orders**.
2. Find the completed order in the grid. Then in the **Action** column, click the **View** link to open the order in edit mode.
3. In the upper right corner, tap **Credit Memo**. (The Credit Memo button appears only for completed orders.)

The New Credit Memo page looks similar to a completed order, but with an Items to Refund section that lists each item from the invoice.

4. Do one of the following:
  - If the product is to be returned to inventory, mark the **Return to Stock** checkbox.
  - If the product will not be returned to inventory, leave the checkbox blank.

The Return to Stock checkbox appears only if inventory **Stock Options** are set to “Decrease Stock When Order Is Placed.”

If an online payment method was used, you will not be able to mark the checkbox.



Items to Refund								
Product	Price	Qty	Return to Stock	Qty to Refund	Subtotal	Tax Amount	Discount Amount	Row Total
Beaumont Summit Kit SKU: MPT1-G-Orange Color: Orange Size: L	\$42.00	Ordered: 1 Invoiced: 1 Shipped: 1	<input type="checkbox"/>	<input type="text" value="1"/>	\$42.00	\$3.47	\$0.00	\$45.47
Gift Wrapping	\$2.99					\$0.00		
<button>Update Qty's</button>								

*Items to Refund*

5. Complete the following:

- a. If the quantity of products to be refunded is less than the quantity purchased, enter the number of items to be returned in the **Qty to Refund** box. Then, press the **Enter** key to record the change. The Update Qty's button appears.

If applicable, make sure to set the **Qty to Refund** of any items not to be refunded to zero.

- b. Tap **Update Qty's** to recalculate the total. (The amount to be credited cannot exceed the maximum quantity that is available for refund.)
6. In the **Refund Totals** section, do the following, as applicable:
- a. In the **Refund Shipping** field, enter the amount that is to be refunded from the shipping fee. This field initially displays the total shipping amount from the order that is available for refund. It is equal to the full shipping amount from the order, less any shipping amount that has already been refunded. Like the quantity, the amount can be reduced, but not increased.
  - b. In the **Adjustment Refund** field, enter a value to be added to the total amount refunded as an additional refund that does not apply to any particular part of the order, such as shipping or tax. The amount entered cannot raise the total refund higher than the paid amount.
  - c. In the **Adjustment Fee** field, enter a value to be subtracted from the total amount refunded. This amount is not subtracted from a specific section of the order such as shipping, items, or tax.
  - d. If the purchase was paid with store credit, mark the **Refund to Store Credit** checkbox. The amount will be credited to the customer's account balance.
  - e. To add a comment, enter the text in the **Credit Memo Comments** box.
  - f. To send an email notification to the customer, mark the **Email Copy of Credit Memo** checkbox.
  - g. To include the comments you have entered in the email, mark the **Append Comments** checkbox.

The status of a credit memo notification appears in the completed credit memo next to the credit memo number.

Order Total

Credit Memo Comments

Comment Text

Refund less gift wrap charge

Adjustment Fee for Gift Wrap

Refund Totals

Subtotal	\$42.00
Refund Shipping	\$0
Adjustment Refund	\$0
Adjustment Fee	\$2.99
Gift Wrapping for Items	\$2.99
Tax	\$3.47
<b>Grand Total</b>	<b>\$58.46</b>

☐ Append Comments

☐ Email Copy of Credit Memo

☐ Refund to Store Credit \$3.46

Refund Offline

### Refund Totals

7. To explain the refund, enter the text in the **Comment Text** box.
  - To send the comment to the customer by email, mark the **Email Copy of Credit Memo** checkbox.

To refund the amount to the customer's store credit, mark the **Refund to Store Credit** checkbox. Then if applicable, enter the amount to be refunded to store credit.

8. To complete the process and generate the credit memo, tap one of the following refund buttons that appears according to the payment type:
  - Refund Offline
  - Refund Online

You can view the completed credit memo from the **Credit Memo** tab of the order, and also in the main **Credit Memos** grid. For a hard copy of the credit memo, see: [Printing Credit Memos](#).

#000000006

Back Send Email Credit Memo Reorder Create Returns

✓ You created the credit memo.

Search by keyword

Filters Default view Columns Report

Select Items 1 records found 20 per page 1 of 1

Credit Memo	Created	Order	Order Date	Bill to Name	Status	Refunded	Action
000000002	Mar 2, 2016 4:16:21 PM	000000006	Feb 27, 2016 1:37:55 PM	Veronica Corsetti	Refunded	\$58.47	<a href="#">View</a>

ORDER VIEW

Information

INVOICES

Credit Memos

Shipments

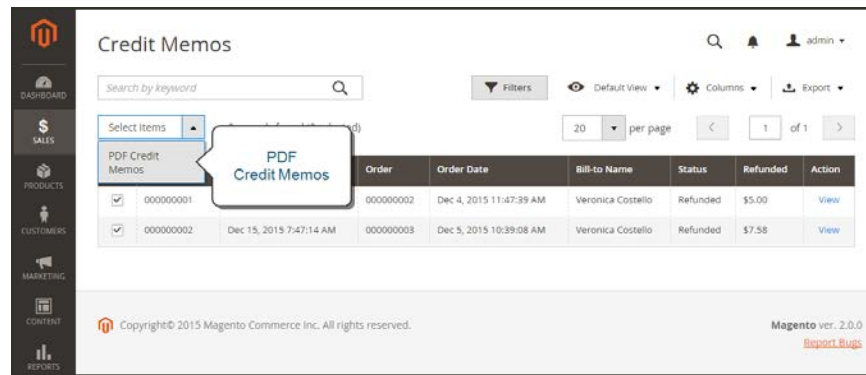
Comments History

Copyright © 2016 Magento Commerce Inc. All rights reserved. Magento ver. 2.0.0 [Report Bug](#)

### Saved Credit Memo

## Printing Credit Memos

To print or view the completed credit memo, you must have a PDF reader installed on your computer. You can download [Adobe Reader](#) at no charge.



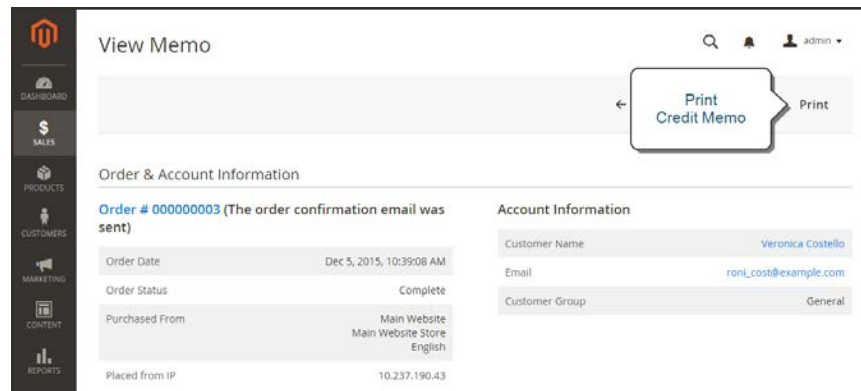
*Credit Memos*

### To print a credit memo:

1. On the Admin sidebar, tap **Sales**. Then under **Operations**, choose **Credit Memos**.
2. Use one of the following methods to print the credit memo:

## Method 1: Print current credit memo

1. In the grid, open the credit memo.
2. Tap **Print**.



*Print Credit Memo*

## Method 2: Print multiple credit memos

1. In the list, mark the checkbox of each credit memo that you want to print.
2. Set the **Actions** control to “PDF Credit Memos. Then, tap **Submit**.
3. When prompted, do one of the following:
  - To save the document, tap **Save**. Then, follow the prompts to save the file to your computer. When the download is complete, open the PDF in Adobe Reader, and print the document.
  - To view the document, tap **Open**. The printed-ready PDF credit memo opens in Adobe Reader. From here, you can either print the credit memo or save it to your computer.

## Store Credit

Store credit is an amount that is restored to a customer account. Customers can use their store credit to pay for purchases, and administrators can use store credit for cash refunds. Gift card balances can be credited to the customer’s account, instead of using the gift card code for future purchases.

After an order is paid and invoiced, all of the order, or a portion of it, can be refunded by issuing a credit memo. A credit memo differs from a refund because the amount of the credit is restored to the customer’s account where it can be used for future purchases. In some cases, a refund can be given at the same time that a credit memo is issued, and applied to the customer’s balance of store credit. The amount of store credit that is available in the customer’s account is specified in the configuration.

## Store Credit Workflow

1

**Customer Login.** Customer logs into account before beginning the checkout process.

2

**Use Store Credit.** During the Review & Payments step of the checkout process, the customer elects to “Use Store Credit” as a payment option. The available balance is shown in parentheses. If the available balance is greater than the order grand total, the other payment methods disappear.

3

**Credit Applied to Order.** The amount of store credit that is applied to the order appears with the order totals, and is subtracted from the grand total.

4

**Customer Balance Adjusted.** The customer’s available balance is adjusted when the order is placed.

Orders paid with store credit cannot be refunded, and credit memos cannot be issued. To refund such an order, the order must be canceled and the balance manually added to the customer’s account. If an order is partially paid with store credit, the amount paid with store credit cannot be refunded. Again, the amount must be manually be added to the customer’s account.

5

**Managing Refunds.** Orders paid with store credit cannot be refunded, nor can credit memos be issued. To refund such an order, the order must be canceled and the balance manually added to the customer’s account. If an order is partially paid with store credit, the amount paid with store credit cannot be refunded. Again, the amount must be manually be added to the customer’s account.

## Applying Store Credit

Administrators can view the credit balance and history from the account of a customer, and also apply store credit to a purchase.

*Customer Credit Balance and History*

### To view the credit balance:

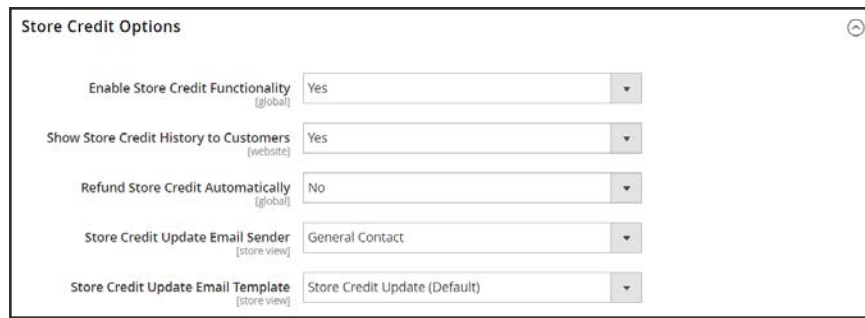
1. On the Admin sidebar, tap **Customers**. Then under **Operations**, choose **All Customers**.
2. Find the customer in the grid. Then in the **Action** column, click **Edit**.
3. In the panel on the left, choose **Store Credit**.

Store Credit Balance	
1 records found	
Balance	Website
\$50.47	Main Website

*Store Credit Balance*

## Configuring Store Credit

The store credit configuration controls automatic refunds, the display of available credit in customers' accounts, and the email template that is used for notifications sent to customers.



**Store Credit Options**

Enable Store Credit Functionality [global] Yes

Show Store Credit History to Customers [website] Yes


Refund Store Credit Automatically [global] No

Store Credit Update Email Sender [store view] General Contact

Store Credit Update Email Template [store view] Store Credit Update (Default)

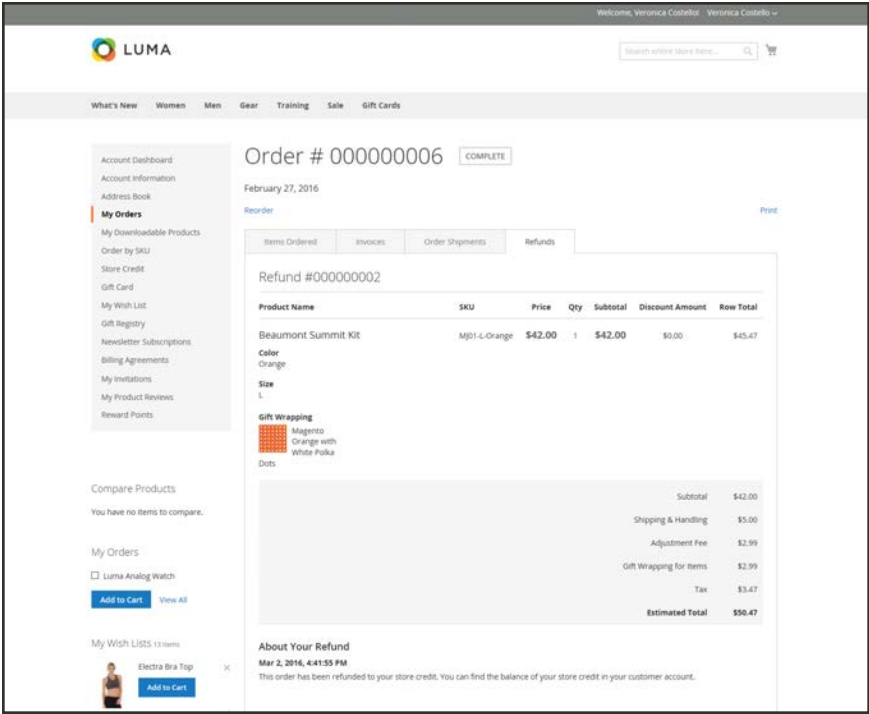
*Store Credit Options*

### To configure store credit:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Customers**, choose **Customer Configuration**.
3. Expand  the **Store Credit Options** section. Then, do the following:
  - a. Set **Enable Store Credit Functionality** to “Yes.”
  - b. Set the following to your preference:
    - Show Store Credit History to Customers
    - Refund Store Credit Automatically
  - c. Set **Store Credit Update Email Sender** to the store identity that appears as the sender of email notifications sent to customers.
  - d. Set **Store Credit Update Email Template** to the template that is used for email notifications sent to customers.
4. When complete, tap **Save Config.**

# Refunds in Customer Account

Customers can track the status of their refunds and verify the balance of their store credit from the dashboard of their accounts.



Refund Detail



## To view a refund from your customer account:

1. From the storefront, log into your customer account. Then, do one of the following:
  - Find the order in the list of **Recent Orders**, and click **View**.
  - In the panel on the left, choose **My Orders**. Then, find the order in the list and click **View**.
2. Tap the **Refunds** tab to view the details of the refund.
3. If the refund was applied to store credit, choose **Store Credit** in the panel on the left.

The amount refunded to your store credit appears in the list with the date and time of the action.

The screenshot displays the 'Store Credit' section of a customer account. On the left is a navigation menu with options like 'Account Dashboard', 'My Orders', and 'Store Credit'. The main content area shows the current store credit balance as \$50.47. Below this is a 'Balance History' table with columns for Action, Balance Change, Balance, and Date. The first row of the table is highlighted with a callout box labeled 'Refund', indicating a refund of \$50.47 on 3/2/16 at 4:16 PM.

Action	Balance Change	Balance	Date
Refunded	\$50.47	\$50.47	3/2/16, 4:16 PM
Used	-\$34.79	\$0.00	2/27/16, 4:17 PM
Used	-\$65.21	\$34.79	2/26/16, 5:30 PM
Updated	\$100.00	\$100.00	2/14/16, 11:11 AM
Used	-\$7.64	\$0.00	2/2/16, 9:21 AM
Created	\$7.64	\$7.64	12/9/15, 2:31 PM

*Amount Refunded to Store Credit*

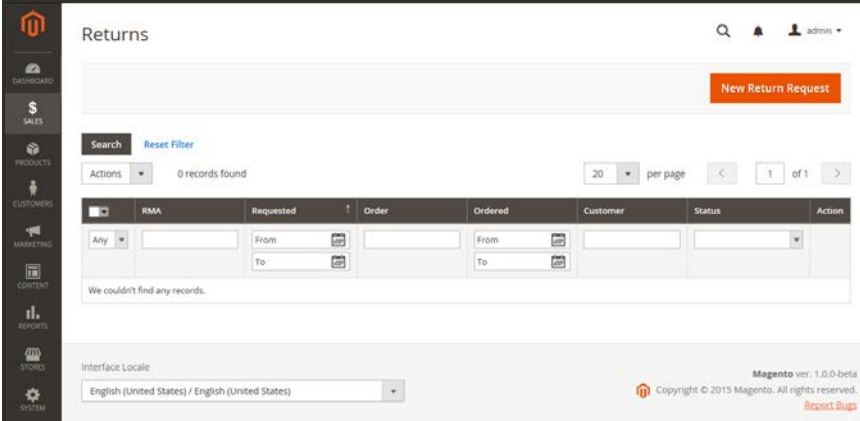


## CHAPTER 62:

# Returns

A returned merchandise authorization (RMA) can be granted to customers who request to return an item for replacement or refund. Typically the customer contacts the merchant to request a refund. If approved, a unique RMA number is assigned to identify the returned product. In the configuration, you can either enable RMA for all products, or allow RMA for only certain products. The Returns grid lists the current returned merchandise requests (RMAs), and is used to enter new return requests..

RMAs can be issued for Simple, Grouped, Configurable, and Bundle product types. However, RMAs are not available for virtual products, downloadable products, and gift cards.



Returns

## RMA Workflow

1

**Receive Request.** Both registered customers and guests can request an RMA. You can also submit an RMA request from the Admin.

2

**RMA Issued.** After considering the request, you can authorize it partially, completely, or cancel the request. If you authorize the return and agree to pay for the return shipment, you can create a shipment order from the Admin with a supported carrier.

3

**Merchandise Returned.** The customer follows your shipping instructions and returns the merchandise to you,

4

**Receive Merchandise.** You receive and approve the return partially or completely, or cancel the RMA.

## Configuring Returns

By default, RMA requests can be submitted by customers from the storefront. Requests to return individual items are managed by the Enable RMA attribute, which is managed in the Advanced Settings section of each product record, under **Autosettings**. By default, the configuration settings are applied to the product. If Enable RMA is set to “No,” the product does not appear in the list of items that are available for return. An RMA can be generated only if there is an item in the order that is available for return. Changes to the value of the Enable RMA attribute apply to both new and existing orders.

The screenshot shows the 'Autosettings' configuration panel for a product. The panel is titled 'Autosettings' and has an 'Add Attribute' dropdown in the top right corner. The settings are organized into several sections:

- Short Description:** A large text area with a 'WYSIWYG Editor' button below it. The label '[STORE VIEW]' is to the right.
- Visibility:** A dropdown menu set to 'Catalog, Search'. The label '[STORE VIEW]' is to the right.
- Set Product as New from Date:** A date picker field. The label '[WEBSITE]' is to the right.
- Set Product as New to Date:** A date picker field. The label '[WEBSITE]' is to the right.
- Country of Manufacture:** A dropdown menu. The label '[WEBSITE]' is to the right.
- Allow Gift Message:** A dropdown menu set to 'No' and a checkbox labeled 'Use Config Settings' which is checked. The label '[GLOBAL]' is to the right.
- Enable RMA:** A dropdown menu set to 'Use config'. A callout box with the text 'Enable RMA' points to this dropdown. The label '[STORE VIEW]' is to the right.
- Enable RMA:** A dropdown menu set to 'Use config'. The label '[WEBSITE]' is to the right.

*Enable RMA for Product*

### To enable RMAs:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under Sales, choose **Sales**.
3. Expand the **RMA Settings** section. Then, do the following:

**RMA Settings**

Enable RMA on Storefront: No [WEBSITE]

Enable RMA on Product Level: Yes [WEBSITE]

Use Store Address: No [WEBSITE]

Contact Name: [WEBSITE]

Street Address: [WEBSITE]

City: [WEBSITE]

State/Province: Please select a region, state or province. [WEBSITE]

ZIP/Postal Code: [WEBSITE]

Country: United States [WEBSITE]

### *RMA Settings*

- a. Set **Enable RMA on Storefront** to “Yes.”
- b. Set **Enable RMA on Product Level** to “Yes.”
- c. Set **Use Store Address** to one of the following:

Yes Choose “Yes” to have returned products sent to the store address.

No Choose “No,” and enter an alternate address where returned products are to be sent.

**RMA Settings**

Enable RMA on Storefront: Yes [WEBSITE]

Enable RMA on Product Level: Yes [WEBSITE]

Use Store Address: No [WEBSITE]

Contact Name: [WEBSITE]

Street Address: [WEBSITE]

City: [WEBSITE]

State/Province: Please select a region, state or province. [WEBSITE]

ZIP/Postal Code: [WEBSITE]

Country: United States [WEBSITE]

### *RMA Settings with Alternate Address*

4. When complete, tap **Save Config.**

## Returns Attribute

The Returns Attributes are used to store information that is needed during the product return process. The default attributes include the condition of the returned product, the reason for the return, and a field that indicates how the return was resolved. The process to create a returns attribute is similar to creating a [customer attribute](#).

Attribute Code	Default label	Required	System	Visible to Customer	Sort Order
resolution	Resolution	Yes	Yes	Yes	90
condition	Item Condition	Yes	Yes	Yes	100
reason	Reason to Return	Yes	Yes	Yes	110
reason_other	Other	Yes	Yes	Yes	120

*Returns Attributes*

### To create a returns attribute:

1. On the Admin sidebar, choose **Stores**. Then under **Attributes**, choose **Returns**.
2. In the upper-right corner, tap **Add New Attribute**.
3. Follow the same process as you would to create a [customer attribute](#).

**Attribute Properties**

Default label:

Attribute Code:

Input Type:

Values Required:

Default Value:

Input Validation:

Minimum Text Length:

Maximum Text Length:

Input/Output Filter:

**Storefront Properties**

Show on Storefront:

Sort Order:

*New Returns Attribute*

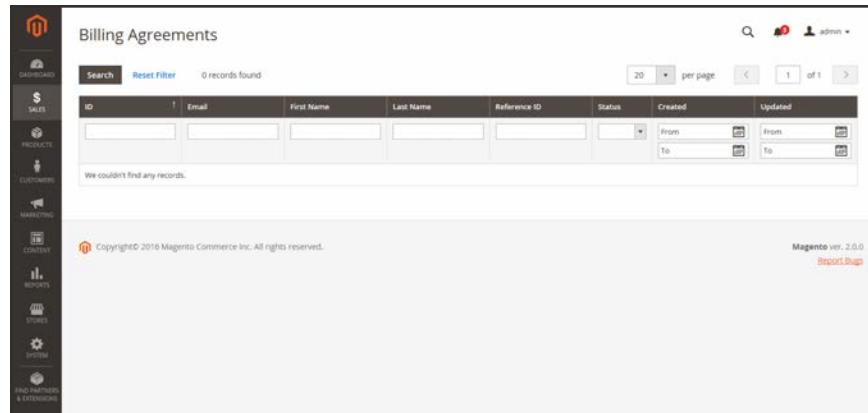




## CHAPTER 63:

# Billing Agreements

The Billing Agreements grid lists all **billing agreements** between your store and its customers. The store administrator can filter the records by the customer or billing agreement information including billing agreement reference ID, status, and creation date. Each record includes general information about the billing agreement, and all sales orders that have used it as a payment method. The store administrator can view, cancel, or delete customer's billing agreements. A canceled billing agreement can be deleted only by the store administrator.



*Billing Agreements*



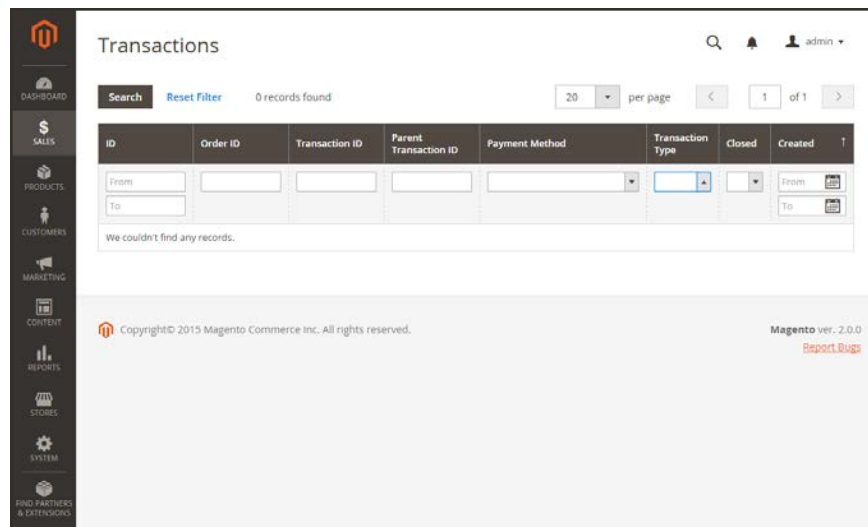
## CHAPTER 64:

# Transactions

The Transactions grid lists all payment activity that has taken place between your store and a payment system, and provides access to more detailed information.

### To view transactions:

On the Admin sidebar, tap **Sales**. Then under **Operations**, choose **Transactions**.



*Transactions*

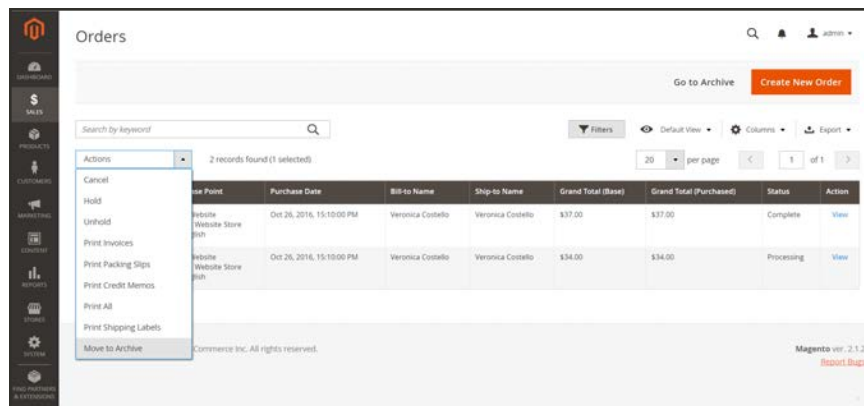


## CHAPTER 65:

## Archive

Your store can be configured to archive orders, invoices, shipments, and credit memos after a set number of days. Archiving orders on a regular basis improves performance and keeps your workspace free of unnecessary information, so you can focus on current business. Invoices, shipments, and credit memos are archived separately from orders, and can be accessed any time. You can move orders and their associated documents to the archive, or restore them to their previous state. Archived orders are not deleted and remain available from the Admin. Archived data can be exported to a CSV file and opened in a spreadsheet. When enabled, the “Archive” command appears at the top of the workspace.

The Archive options appear in the Sales menu only when archiving is enabled.



*Move Order to Archive*

### To configure the order archive:

1. On the Admin menu, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the Configuration panel on the left, under **Sales**, choose **Sales**.
3. Expand ⌵ the **Orders, Invoices, Shipments, Credit Memos Archiving** section. Then, follow the steps below.

*Orders, Invoices, Shipments, Credit Memos Archiving*

- a. Set **Enable Archiving** to “Yes.”

If you later decide to turn archiving off, all archived orders will be restored to the previous state.

- b. Set **Archive Orders Purchased** to the number of days to keep an order in the grid before it is archived. By default, this waiting period is set to 30 days.
  - c. In the **Order Statuses to be Archive** list, select the order status settings you want to use to identify the orders to be archived. To select multiple items, hold the Ctrl key down and click each item. Repeat to deselect any item.
4. When finished, tap **Save Config** to save the changes. Then when prompted, refresh each invalid cache.
  5. On the Admin sidebar, tap **Sales**. An Archive section now appears in the Sales menu. You can now do any of the following:

### View Archived Documents:

1. On the Admin sidebar, tap **Sales**. Then under **Archive**, choose any of the following.
  - Orders
  - Invoices
  - Shipments
  - Credit Memos
2. Click any archived document in the list to view details.

### Apply an Action

Select each document to be the target of the action. Then, choose one of the following actions:

- Cancel
- Hold
- Unhold
- Print
- Move to Orders Management

## Manually Archive Documents

1. Select the type of the document to archive from the following:
  - Orders
  - Invoices
  - Shipments
  - Credit Memos
2. Mark the checkbox of each item that you want to archive.
3. In the upper-right corner, set **Actions** to “Move to Archive.”
4. Tap **Submit** to archive the selected documents.

## Restore Archived Documents

1. Choose the type of document you want to restore.
2. To select all visible documents, in the upper-left corner, click **Select Visible**. Otherwise, manually select the checkbox of each document you want to restore.
3. In the upper-right, set **Action** to “Move to Orders Management.”
4. Click the **Submit** button to restore the documents.

## Export Archived Documents

1. Choose the type of document you want to export.
2. In the upper-right menu, set **Export to:** to one of the following:
  - CSV
  - Excel
3. Tap **Export**.



# P ayments

## Contents

In this section of the guide, you will learn about the **Recommended Solutions** payment methods, services, and gateways that you can make available to your customers, and how to configure them.

### PayPal

- PayPal Business Account

- PayPal All-In-One Solutions

  - PayPal Payments Advanced

  - PayPal Payments Pro

  - PayPal Payments Standard

- PayPal Payment Gateways

  - PayPal Payflow Pro

  - PayPal Payflow Link

- PayPal Express Checkout

  - PayPal In-Context Checkout

- PayPal Fraud Management Filter

- PayPal Payment Solutions

  - PayPal Solutions by Country

- Braintree

- Basic Payment Methods

  - Check / Money Order

  - Cash On Delivery

  - Bank Transfer

  - Purchase Order

  - Zero Subtotal Checkout

- Other Payment Solutions

  - Authorize.Net Direct Post

  - Cybersource

  - eWAY

  - Worldpay



## CHAPTER 66:

# Recommended Solutions

The following payment solutions provide an easy way for merchants who are just starting out to accept online payments. As your business grows, you can combine these with additional PayPal payment solutions.



### PayPal Express Checkout

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Use PayPal Express Checkout as a standalone option, or combine it with another PayPal payment solution.



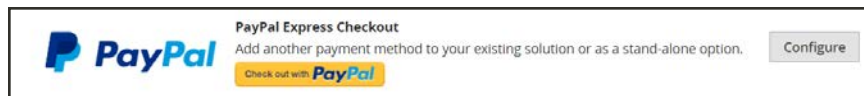
### Braintree

---

Braintree allows you to accept credit/debit cards and PayPal without any setup or monthly fees. Your customers never leave your store to complete the purchase.

## PayPal Express Checkout

PayPal Express Checkout helps boost sales by giving your customers the ability to pay by credit card or from the security of their personal PayPal accounts. During checkout, the customer is redirected to the secure PayPal site to complete the payment information. The customer is then returned to your store to complete the remainder of the checkout process. Choosing Express Checkout adds the familiar PayPal button to your store, which has been reported to increase sales.\*



Customers with current PayPal accounts can make a purchase in a single step by clicking the “Check out with PayPal” button. Express Checkout can be used as a standalone, or in combination with one of PayPal’s All-In-One solutions. If you already accept credit cards online, you can offer Express Checkout as an additional option to attract new customers who prefer to pay with PayPal.

### Requirements

- ☒ Merchant: **Personal PayPal Account**
- ☒ Customer: **Personal PayPal Account**

## Checkout Workflow

Unlike other payment methods, PayPal Express Checkout allows the customer to check out at the beginning of the usual checkout workflow from the product page, the mini shopping cart, and shopping cart.

1

**Customer Places Order.** The customer taps the “Check out with PayPal” button. .

2

**Customer Is Redirected to PayPal Site.** The customer is redirected to the PayPal site to complete the transaction. / The customer taps the “Check out with PayPal” button. and is redirected to the PayPal site to complete the transaction.

3

**Customer Logs into their PayPal Account.** The customer must log in to their PayPal account to complete the transaction. The payment system uses the customer’s billing and shipping information from their PayPal account.

4

**Customer Returns to the Checkout Page.** The customer is redirected back to the checkout page in your store to review the order.

5

**Customer Places Order.** The customer places the order, and the order information is submitted to PayPal.

6

**PayPal Settles the Transaction.** PayPal receives the order and settles the transaction.

PayPal Express Checkout does not support orders with multiple-addresses.

## Setting Up PayPal Express Checkout

You can have two PayPal solutions active at the same time: Express Checkout, plus an All-In-One solution. If you enable a different solution, the one used previously is automatically deactivated.

**Process Overview:**

Step 1: [Configure Your PayPal Account](#)

Step 2: [Complete the Required Settings](#)

Step 3: [Advertise PayPal Credit](#)

Step 4: [Complete the Basic Settings](#)

Step 5: [Complete the Advanced Settings](#)

## Step 1: Configure Your PayPal Account

1. Before you begin, you must configure your PayPal merchant account on the PayPal website.
  - a. Log in to your PayPal Advanced account at [manager.paypal.com](https://manager.paypal.com).
  - b. Go to **Service Settings > Hosted Checkout Pages > Set Up**, and make the following settings:

AVS	No
CSC	No
Enable Secure Token	Yes
  - c. **Save** the settings.
2. PayPal recommends that you set up an additional user on your account. To set up an additional user, do the following:
  - a. Go to [manager.paypal.com](https://manager.paypal.com) and log in to your account.
  - b. Follow the instructions to set up an additional user.
  - c. **Save** the changes.
3. Expand ☺ the **Required PayPal Settings** section, and do the following:
  - a. Enter the **Email Address** that is associated with your PayPal merchant account.

**Important!** Email addresses are case sensitive. To receive payment, the email address you enter must match the email address specified in your PayPal merchant account.

- b. Set **API Authentication Methods** to one of the following:
      - API Signature
      - API Certificate
    - c. If necessary, click the **Get Credentials from PayPal** button. Then, complete the following:
      - API Username
      - API Password
      - API Signature
    - d. If you are using credentials from your sandbox account, set **Sandbox Mode** to “Yes.”  
If necessary, click the **Sandbox Credentials** button and follow the instructions to set up your testing environment.

When testing the configuration in a sandbox, use only **credit card numbers** that are recommended by PayPal. When you are ready to “go live,” return to the configuration and set Sandbox Mode to “No.”

- a. If your system uses a proxy server to establish the connection between Magento and the PayPal payment system, set **API Uses Proxy** to “Yes.” Then,, complete the following:
    - Proxy Host
    - Proxy Port
4. When these sections are complete, set **Enable this Solution** to “Yes.”
5. To enable **PayPal In-Context Checkout**, do the following:
  - a. Set **Enable In-Context Checkout Experience** to “Yes.”
  - b. Enter your PayPal **Merchant Account ID**.

Your Merchant Account ID is in your PayPal **business account** profile.

- 6.** To offer financing through PayPal to your customers, see PayPal Credit to learn more.

You have now completed the Required PayPal Settings. At this point, you can either continue with the Basic and Advanced Settings, or click the **Save Config** button. You can return later fine-tune the configuration.

## Step 2: Complete the Required Settings

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Payment Methods**.
3. If your Magento installation has multiple websites, stores or views, in the upper-left corner, choose the **Store View** where the configuration applies.
4. In the **Merchant Location** section, select the **Merchant Country** where your business is located.
5. Under Recommended Solutions in the **PayPal Express Checkout** section, tap **Configure**. Then, do the following:
  - a. Enter the **Email Address** that is associated with your PayPal merchant account.

**Important!** Email addresses are case sensitive. To receive payment, the email address you enter must match the email address specified in your PayPal merchant account.

- b.** Set **API Authentication Methods** to one of the following:

  - API Signature
  - API Certificate
- c.** If necessary, tap **Get Credentials from PayPal**. Then, complete the following:



- API Username
- API Password
- API Signature

- d.** If you are using credentials from your sandbox account, set **Sandbox Mode** to “Yes.”

If necessary, click the **Sandbox Credentials** button and follow the instructions to set up your testing environment.

- e.** If your system uses a proxy server to establish the connection between Magento and the PayPal payment system, set **API Uses Proxy** to “Yes.” Then,, complete the following:

- Proxy Host
- Proxy Port

- 6.** Set **Enable This Solution** to “Yes.”

- 7.** If you want to offer PayPal Credit to your customers, set **Enable PayPal Credit** to “Yes.”

You have now completed the required settings. You can either continue with the remaining settings, or save and return later fine-tune the configuration.

#### Step 4: Complete the Basic Settings

1. Expand ☺ the **Basic Settings - PayPal Express Checkout** section.
2. Enter a **Title** to identify this payment method during checkout. It is recommended to set the title to “PayPal” for each store view.
3. If you offer multiple payment methods, enter a number in the **Sort Order** field to determine the sequence in which PayPal Payments Standard is listed with the other methods. Payment methods appear in ascending order based on the Sort Order value.
4. Set **Payment Action** to one of the following:

Authorization	Approves the purchase, but puts a hold on the funds. The amount is not withdrawn until it is “captured” by the merchant.
Sale	The amount of the purchase is authorized and immediately withdrawn from the customer’s account.

**Order** The amount of the order is neither captured nor authorized in the customer’s balance, bank account, or credit card at PayPal. The Order payment action represents an agreement between the PayPal payment system and the merchant, which enables the merchant to capture one or more amounts up to the “ordered” total from the customer’s buyer account, over a period of up to 29 days. After the funds are “ordered,” the merchant can capture them at any time during the following 29 day period. Capturing of the order amount can be done only from the Magento Admin by creating one or more invoices.

- 5. To display the “Check out with PayPal” button on the product page, set **Display on Product Details Page** to “Yes.”
- 6. If **Payment Action** is set to “Order,” complete the following fields:

Authorization Honor Period (days)	Determines how long the primary authorization remains valid. The value should be equal to the corresponding value in your PayPal merchant account. The default value in your PayPal merchant account is 3. To increase this number you need to contact PayPal. The authorization becomes invalid at 11:49 p.m., U.S. Pacific Time, of the last day.
Order Valid Period (days)	Determines how long the order remains valid. When the order becomes invalid, you can no longer create invoices for it. Specify the value equal to the Order Valid Period value in your PayPal merchant account. The default value in your PayPal merchant account is 29. To change this number, you must contact PayPal.
Number of Child Authorizations	Specifies the maximum number of authorizations for a single order, which determines the maximum number of online partial invoices that you can create for an order. The number in this field should be equal to the corresponding setting in your PayPal merchant account. The default number of child authorizations in your PayPal account is 1. To increase this number, you must contact PayPal.

Basic Settings - PayPal Express Checkout

Title

PayPal Express Checkout

[STORE VIEW]

It is recommended to set this value to "Magento\_Paypal" per store views.

Sort Order

[STORE VIEW]

Payment Action

Authorization

[WEBSITE]

Display on Product Details Page

Yes

[STORE VIEW]

Basic Settings

## Step 5: Complete the Advanced Settings

1. Expand  the **Advanced Settings** section. Then, complete the following:

- a. Set **Display on Shopping Cart** to “Yes.”

- b. Set **Payment Applicable From** to one of the following:

All Allowed Countries	Accepts payment from the countries already specified in your configuration.
-----------------------	---

Specific Countries	Accepts payments from only the countries you specify. Hold the Ctrl key down and in the Payment Applicable From list, click each country where you accept payment.
--------------------	--

- c. Set **Debug Mode** to “Yes” to write communications with the payment system into the log file. The log file for PayPal Payments Advanced is payments\_payflow\_advanced.log.

In accordance with PCI Data Security Standards, credit card information is not recorded in the log file.

- d. To enable host authenticity verification, set **Enable SSL Verification** to “Yes.”

- e. To display a full summary of the customer’s order by line item from the PayPal site, set **Transfer Cart Line Items** to “Yes.”

To include up to ten shipping options in the summary, set **Transfer Shipping Options** to “Yes.” (This option appears only if line items are set to transfer.)

- f. To determine the type of image used for the PayPal acceptance button, set **Shortcut Buttons Flavor** to one of the following:

Dynamic	(Recommended) Displays an image that can be dynamically changed from the PayPal server.
---------	---

Static	Displays a specific image that cannot be dynamically changed.
--------	---

- g. To allow customers without PayPal accounts to make a purchases with this method, set **Enable PayPal Guest Checkout** to “Yes.”

- h. Set **Require Customer’s Billing Address** to one of the following:

Yes	Requires the customer’s billing address for all purchases.
-----	--

No	Does not require the customer’s billing address for any purchases.
----	--

For Virtual Quotes Only	Requires the customer’s billing address for virtual quotes only.
-------------------------	--

- i. To specify whether the customer can sign a **billing agreement** with your store in the PayPal payment system when there are no active billing agreements available in the customer account, set **Billing Agreement Signup** to one of the following:

Auto	The customer can either sign a billing agreement during the Express Checkout flow or use another method of payment.
Ask Customer	The customer can decide whether to sign a billing agreement during the Express Checkout flow.
Never	The customer cannot sign a billing agreement during the Express Checkout flow.

Merchants must ask PayPal Merchant Technical Support to enable billing agreements in their accounts. The Billing Agreement Signup parameter is enabled only after PayPal confirms that billing agreements are enabled for your merchant account.

- j. To allow the customer to complete the transaction from the PayPal site without returning to your Magento store for Order Review, set **Skip Order Review Step** to “Yes.”

Advanced Settings

Display on Shopping Cart

Yes (PayPal recommends this option)

[STORE VIEW]

Also affects mini-shopping cart.

Payment Applicable From

All Allowed Countries

[WEBSITE]

Debug Mode

No

[WEBSITE]

Enable SSL verification

Yes

[WEBSITE]

Transfer Cart Line Items

Yes

[WEBSITE]

Transfer Shipping Options

No

[WEBSITE]

Notice that PayPal can handle up to 10 shipping options. That is why Magento will transfer only first 10 cheapest shipping options if there are more than 10 available.

Shortcut Buttons Flavor

Dynamic

[STORE VIEW]

Enable PayPal Guest Checkout

No

[WEBSITE]

Ability for buyer to purchase without PayPal account.

Require Customer's Billing Address

No

[WEBSITE]

This feature needs be enabled first for the merchant account through PayPal technical support.

Billing Agreement Signup

Never

[WEBSITE]

Whether to create a billing agreement, if there are no active billing agreements available.

Skip Order Review Step

Yes

[WEBSITE]


Advanced Settings

2. Complete the following sections as needed for your store:

PayPal Billing Agreement Settings

A **billing agreement** is a sales agreement between the merchant and customer that has been authorized by PayPal for use with multiple orders. During the checkout process, the Billing

Agreement payment option appears only for customers who have already entered into a billing agreement with your company. After PayPal authorizes the agreement, the payment system issues a unique reference ID to identify each order that is associated with the agreement. Similar to a purchase order, there is no limit to the number of billing agreements a customer can set up with your company.

1. Expand  the **PayPal Billing Agreement Settings** section.
2. Set **Enabled** to “Yes.” Then, do the following:
  - a. Enter a **Title** to identify the PayPal Billing Agreement method during checkout.
  - b. If you offer multiple payment methods, enter a number in the **Sort Order** field to determine the sequence in which Billing Agreement appears when listed with other payment methods during checkout.
  - c. Set **Payment Action** to one of the following:
 

Authorization	Approves the purchase, but puts a hold on the funds. The amount is not withdrawn until it is “captured” by the merchant.
Sale	The amount of the purchase is authorized and immediately withdrawn from the customer’s account.
  - d. Set **Payment Applicable From** to one of the following:
 

All Allowed Countries	Accepts payment from the countries already specified in your configuration.
Specific Countries	Accepts payments from only the countries you specify. Hold the Ctrl key down and in the Payment Applicable From list, click each country where you accept payment.
  - e. To record communications with the payment system in the log file, set **Debug Mode** to “Yes.”
 

The log file is stored on the server and is accessible only to developers. In accordance with PCI Data Security Standards, credit card information is not recorded in the log file.
  - f. To enable SSL verification, set **Enable SSL verification** to “Yes.”
  - g. To display a summary of each line item in the customer’s order on your PayPal payments page, set **Transfer Cart Line Items** to “Yes.”
  - h. To allow customers to initiate a billing agreement from the dashboard of their customer account, set **Allow in Billing Agreement Wizard** to “Yes.”

**PayPal Billing Agreement Settings**

Enabled	Yes	[WEBSITE]
Will appear as a payment option only for customers who have at least one active billing agreement.		
Title	PayPal Billing Agreement	[STORE VIEW]
Sort Order		[STORE VIEW]
Payment Action	Authorization	[WEBSITE]
Payment Applicable From	All Allowed Countries	[WEBSITE]
Debug Mode	No	[WEBSITE]
Enable SSL verification	Yes	[WEBSITE]
Transfer Cart Line Items	No	[WEBSITE]
Allow in Billing Agreement Wizard	Yes	[WEBSITE]

*Billing Agreement Settings*

## Settlement Report Settings

1. Click to expand the **Settlement Report Settings** section.
2. If you have signed up for PayPal's Secure FTP Server, enter the following SFTP login credentials:
  - Login
  - Password
3. To run test reports before "going live" with Express Checkout on your site, set **Sandbox Mode** to "Yes."
4. Enter the **Custom Endpoint Hostname or IP Address**. By default, the value is: reports.paypal.com
5. Enter the **Custom Path** where reports are saved. By default, the value is: /ppreports/outgoing
6. To generate reports according to a schedule, under Scheduled Fetching, make the following settings:
  - a. Set **Enable Automatic Fetching** to "Yes."
  - b. Set **Schedule** to one of the following:
    - Daily
    - Every 3 Days
    - Every 7 Days
    - Every 10 Days

- Every 14 Days
- Every 30 Days
- Every 40 Days

PayPal retains each report for forty-five days.

- Set **Time of Day** to the hour, minute, and second when you want the reports to be generated.

*Settlement Report Settings*

## Frontend Experience Settings

The frontend experience settings give you the opportunity to choose which PayPal logos appear on your site, and to customize the appearance of your PayPal merchant pages.

- Click to expand the **Frontend Experience Settings** section.
- Select the **PayPal Product Logo** that you want to appear in the PayPal block in your store. The PayPal logos are available in four styles and two sizes. Options include:
  - No Logo
  - We Prefer PayPal (150 x 60 or 150 x 40)
  - Now Accepting PayPal (150 x 60 or 150 x 40)
  - Payments by PayPal (150 x 60 or 150 x 40)
  - Shop Now Using PayPal (150 x 60 or 150 x 40)

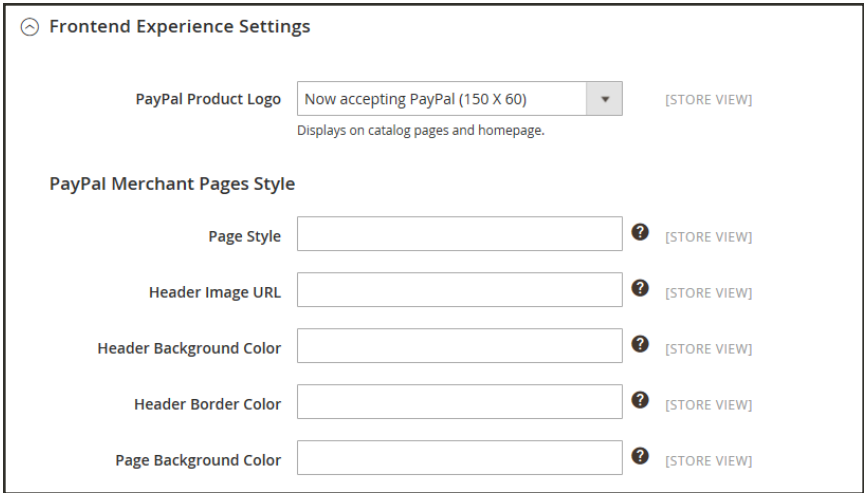
3. To customize the appearance of your PayPal merchant pages, do the following:
- a. Enter the name of the **Page Style** that you want to apply to your PayPal merchant pages. Options include:

paypal	Uses the PayPal page style.
primary	Uses the page style that you identified as the “primary” style in your account profile.
your_custom_value	Uses a custom payment page style, which is specified in your account profile.
  - b. In the **Header Image URL** field, enter the URL of the image that you want to appear in the upper-left corner of the payment page. The maximum file size is 750 pixels wide by 90 pixels high.

PayPal recommends that the image be located on a secure (https) server. Otherwise, the customer’s browser may warn that “the page contains both secure and nonsecure items.”

- c. Enter the six-character hexadecimal code, without the “#” symbol, for each of the following:

Header Background Color	Background color for the checkout page header.
Header Border Color	2-pixel border around the header.
Page Background Color	Background color for the checkout page and around the header and payment form.



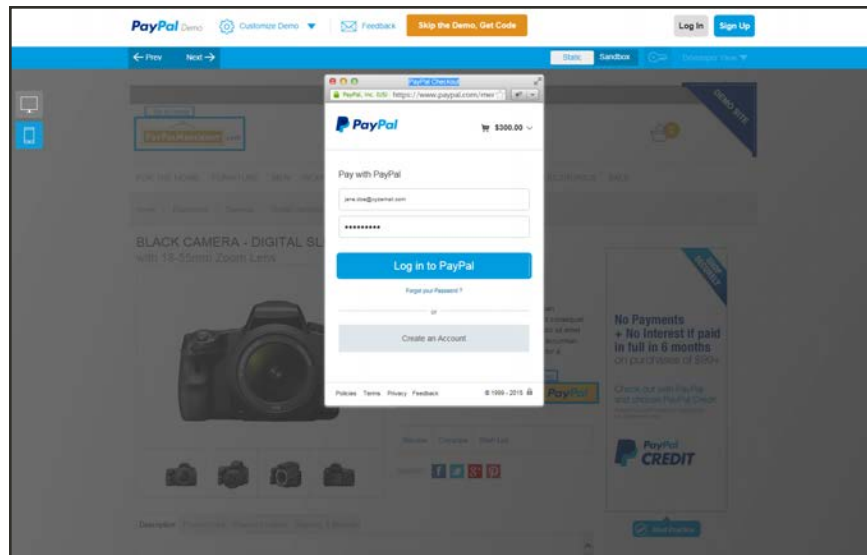
Frontend Experience Settings

3. When complete, tap **Save Config.**



## PayPal In-Context Checkout

PayPal's In-Context Checkout makes it easier than ever to pay online. Customers never lose sight of your store during this simplified one- or two-click seamless checkout. In-Context Checkout works equally well on Macs and PCs, and offers a consistent experience on desktop computers, tablets, and mobile devices. To learn more, see: [In-Context Checkout in Express Checkout](#).

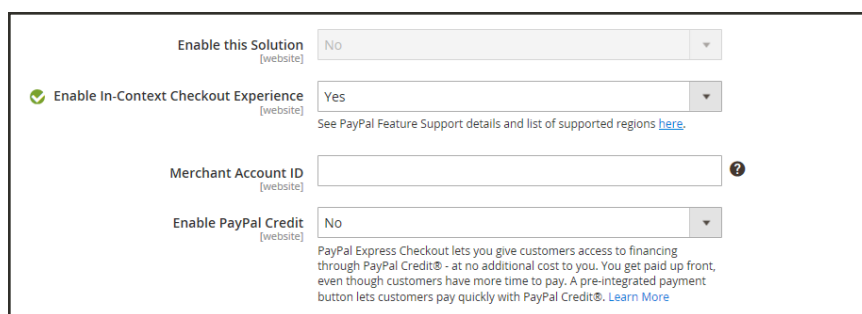


*PayPal In-Context Checkout Demo*

### To configure In-Context Checkout:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Payment Methods**.
3. In the **PayPal Express Checkout** section, tap **Configure**. Then, do the following:
  - a. In the **Required PayPal Settings** section, set **Enable In-Context Checkout Experience** to “Yes.”
  - b. Enter your PayPal **Merchant Account ID**.

Your Merchant Account ID is in your PayPal **business account** profile.



Enable this Solution [website] No

✓ Enable In-Context Checkout Experience [website] Yes  
See PayPal Feature Support details and list of supported regions [here](#).

Merchant Account ID [website]

Enable PayPal Credit [website] No  
PayPal Express Checkout lets you give customers access to financing through PayPal Credit® - at no additional cost to you. You get paid up front, even though customers have more time to pay. A pre-integrated payment button lets customers pay quickly with PayPal Credit®. [Learn More](#)

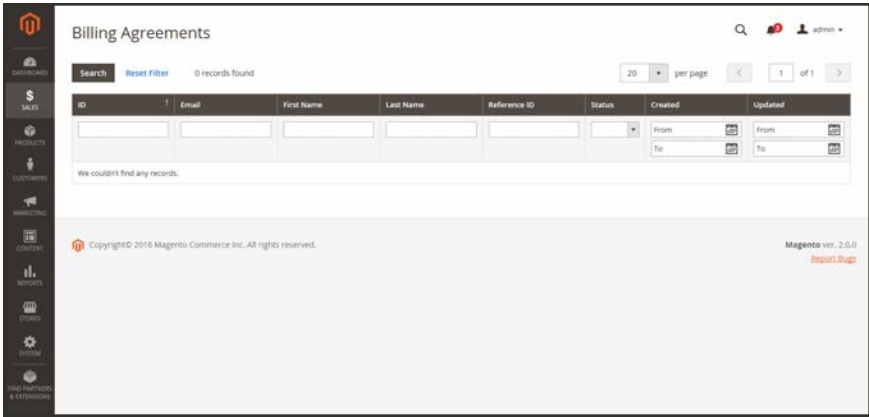
*Enable PayPal In-Context Checkout*

4. When complete, tap **Save Config**.

# PayPal Billing Agreements

To simplify the checkout process, customers can enter into a billing agreement with PayPal, as the payment service provider. During checkout, the customer chooses the billing agreement as the payment method. The payment system verifies the billing agreement by its unique number, and charges the customer's account. With a billing agreement in place, it is no longer necessary for the customer to enter payment information for each purchase. Customers can manage their billing agreements from the dashboard of their customer account, where the status of each is shown as “Active” or “Canceled.” When a billing agreement is canceled, it cannot be reactivated.

The Billing Agreements grid lists all billing agreements between your store and its customers. The store administrator can filter the records by the customer or billing agreement information including billing agreement reference ID, status, and creation date. Each record includes general information about the billing agreement, and all sales orders that have used it as a payment method. The store administrator can view, cancel, or delete customer’s billing agreements. A canceled billing agreement can be deleted only by the store administrator.



*Billing Agreements*

## Billing Agreement Workflow

1

**Customer signs up for a billing agreement.** After a billing agreement is in place, additional billing agreements can be added only from the customer account. There is no limit to the number of billing agreements a customer can create. Customers can use any of the following methods to sign up for billing agreements:

- **Sign up in customer account.** Customers can sign up for a billing agreement from their customer accounts.
- **Sign up at checkout.** Customers who pay for a purchase with PayPal Express Checkout can mark a checkbox to create a billing agreement. Although the billing agreement is not used for the current order, it becomes available as a payment method option the next time the customer places an order.
- **Sign up by store administrator.** On a customer's request, the store administrator can create a sales order using the customer's billing agreement.

2

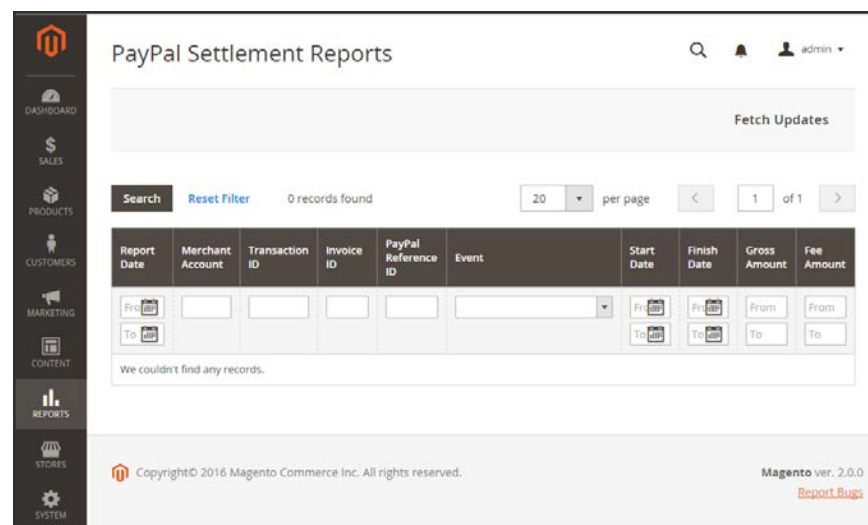
**PayPal Verifies and Records Agreement.** When the customer places the order with payment by billing agreement, the billing agreement reference ID and sales order payment details are transferred to PayPal, and recorded in the customer account, along with reference information. If the payment is authorized, an order is created in Magento. The billing agreement reference ID is sent to the customer and to the store.

## PayPal Settlement Reports

The PayPal Settlement report provides the store administrator with the information about each transaction that affects the settlement of funds.

Before generating settlement reports, the store administrator must request PayPal Merchant Technical Services to create an SFTP user account, enable settlement reports generation, and enable SFTP in their PayPal business account.

After configuring and enabling settlement reports in the PayPal merchant account, Magento will start generating reports during the following twenty-four hours. The list of available settlement reports can be viewed from the Admin.



### To view settlement reports:

1. On the Admin sidebar, tap **Reports**. Then under **Sales**, choose select **PayPal Settlement**.
2. For the most recent updates, tap **Fetch Updates** in the upper-right corner.

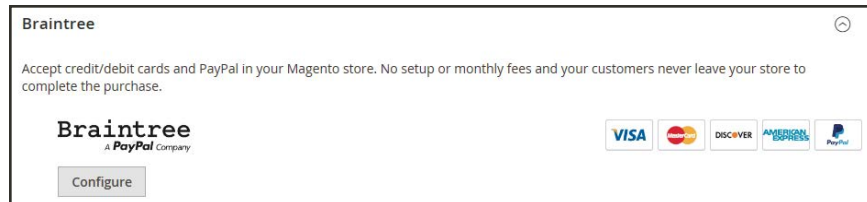
The system connects to the PayPal SFTP server to fetch the reports. When the process is complete, a message appears with the number of reports fetched. The report includes the following information for each transaction:

**Field Descriptions**

FIELD	DESCRIPTION
PayPal Reference ID Type	One of the following reference codes: Order ID Transaction ID Subscription ID
Preapproved Payment ID	Options include:  Custom                      The text entered by the merchant on the transaction in PayPal.  Transaction Debit or Credit      The direction of money movement of gross amount.  Fee Debit or Credit              The direction of money movement for fee.

## Braintree

Braintree offers a fully customizable checkout experience with fraud detection and PayPal integration. Braintree reduces the PCI compliance burden for merchants because the transaction takes place on the Braintree system.



*Configure Braintree*

## Setting Up Braintree

### Process Overview:

- Step 1: [Get Your Braintree Credentials](#)
- Step 2: [Complete the Basic Settings](#)
- Step 3: [Complete the Advanced Settings](#)
- Step 4: [Complete the Country-Specific Settings](#)
- Step 5: [Complete the PayPal through Braintree Settings](#)
- Step 6: [Complete the 3D Verification Settings](#)

### Step 1: Get Your Braintree Credentials

Visit [Braintree Payments](#) and sign up for an account.

### Step 2: Complete the Basic Settings

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Payment Methods**.
  - If your Magento installation has multiple websites, stores or views, in the upper-left corner, choose the **Store View** where the configuration applies.
  - In the **Merchant Location** section, verify that **Merchant Country** is set to the location of your business.
3. Under Recommended Solutions, in the **Braintree** section, tap **Configure**. Then, do the following:

- a. Enter a **Title** to identify Braintree as a payment option during checkout.
- b. Set the current operating **Environment** for Braintree transactions to one of the following:
  - Sandbox
  - Production

When testing the configuration in a sandbox, use only **credit card numbers** that are recommended by Braintree. When you are ready to go live with Braintree, set **Environment** to “Production.”

- c. Set **Payment Action** to one of the following:

Authorize Only	Approves the purchase and puts a hold on the funds. The amount is not withdrawn from the customer’s bank account until the sale is “captured” by the merchant.
----------------	--

Authorize and Capture	The amount of the purchase is authorized and immediately withdrawn from the customer’s account.
-----------------------	---

- d. In the **Merchant ID** field, enter the **Braintree Merchant Account ID** that is to be associated with Braintree transactions.

In your Braintree account, the Merchant Account ID is located in the same place as the public/private API keys.

- e. Enter the following credentials from your Braintree account:

- Public Key
- Private Key

**Basic Braintree Settings**

[Click here to login to your existing Braintree account.](#) Or to setup a new account and accept payments on your website, [click here to signup for a Braintree account.](#)

Powered by [Braintree v.zero](#) with [Hosted Fields](#) latest technology. Hosted Fields are small, transparent iframes that replace the sensitive credit card inputs in your checkout flow - helping you meet the latest data security requirements while ensuring your customization doesn't suffer. [Find out more.](#)

<b>Title</b> <small>[store view]</small>	<input type="text" value="Credit Card (Braintree)"/>
<b>Environment</b> <small>[website]</small>	<input type="text" value="Sandbox"/>
<b>Payment Action</b> <small>[website]</small>	<input type="text" value="Authorize"/>
<b>Merchant ID</b> <small>[website]</small>	<input type="text"/>
<b>Public Key</b> <small>[website]</small>	<input type="text"/>
<b>Private Key</b> <small>[website]</small>	<input type="text"/>

*Basic Settings*

4. Set **Enable this Solution** to “Yes.”



5. To include PayPal as a payment option with Braintree, set **Enable PayPal through Braintree** to “Yes.”
6. If you want the ability to store customer information securely, so customers don't have to reenter it each time they make a purchase, set **Vault Enabled** to “Yes.”



Enable this Solution <small>[website]</small>	No
Enable PayPal through Braintree <small>[website]</small>	No
Vault Enabled <small>[website]</small>	No

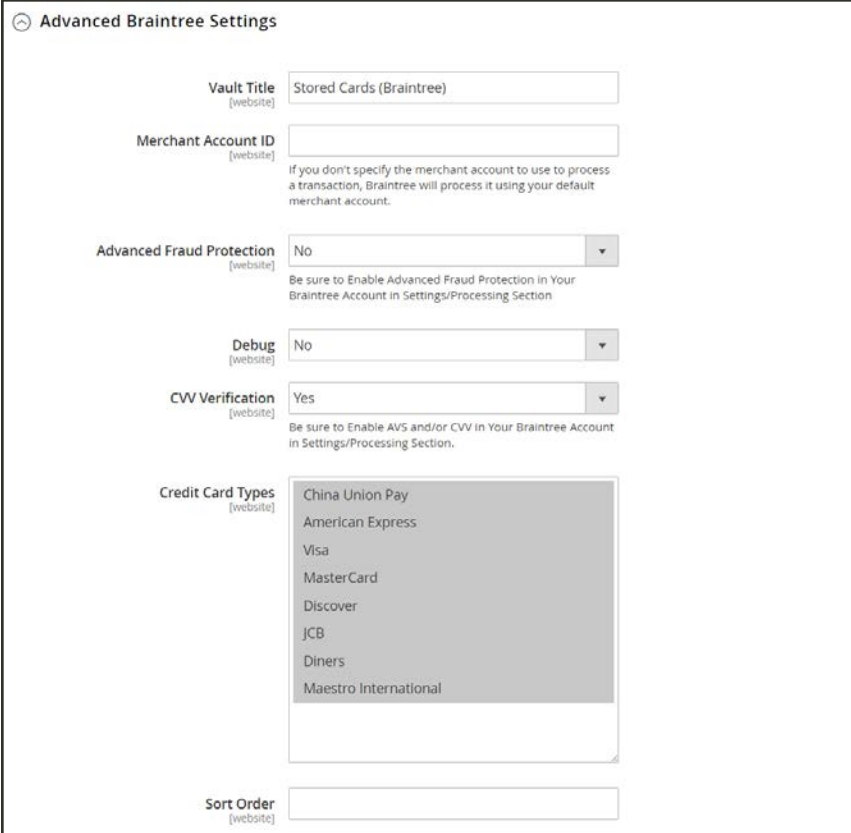
*Basic Settings*

### Step 3: Complete the Advanced Settings

1. Expand ☺ the **Advanced Braintree Settings** section.
2. In the **Vault Title** field, enter a descriptive title for your reference that identifies the vault where your customer card information is stored.
3. In the **Merchant ID** field, enter the **Merchant Account ID** that is to be associated with Braintree transactions. If left blank, the default merchant account from your Braintree account is used.

In your Braintree account, the Merchant ID and Merchant Account ID are two different credentials.

4. To use Braintree fraud protection for all transactions, set **Advanced Fraud Protection** to “Yes.”  
Make sure that Advanced Fraud Protection is enabled in the Settings/Protection section of your account.
5. If you want the system to save a log file of interactions between your store and Braintree, set **Debug** to “Yes.”
6. To require customers to provide the three-digit security code from the back of a credit card, set **CVV Verification** to “Yes.”  
  
If using CVV verification, make sure to enable AVS and/or CVV in the Settings/Processing section of your Braintree account.
7. In the **Credit Card Types** box, hold down the Ctrl key and select each credit card that is accepted by your store as payment through Braintree.
8. In the **Sort Order** field, enter a number to determine the sequence in which Braintree appears when listed with other payment methods during checkout.



The screenshot shows the 'Advanced Braintree Settings' form. It includes the following fields and options:

- Vault Title** [website]: A text input field containing 'Stored Cards (Braintree)'.
- Merchant Account ID** [website]: A text input field. Below it, a note states: 'If you don't specify the merchant account to use to process a transaction, Braintree will process it using your default merchant account.'
- Advanced Fraud Protection** [website]: A dropdown menu set to 'No'. A note below says: 'Be sure to Enable Advanced Fraud Protection in Your Braintree Account in Settings/Processing Section.'
- Debug** [website]: A dropdown menu set to 'No'.
- CVV Verification** [website]: A dropdown menu set to 'Yes'. A note below says: 'Be sure to Enable AVS and/or CVV in Your Braintree Account in Settings/Processing Section.'
- Credit Card Types** [website]: A multi-select dropdown menu showing a list of card types: China Union Pay, American Express, Visa, MasterCard, Discover, JCB, Diners, and Maestro International.
- Sort Order** [website]: A text input field.

*Advanced Settings*

## Step 4: Complete the Country Specific Settings

1. Set **Payment from Applicable Countries** to one of the following:
  - All Allowed Countries
  - Specific Countries

For **Payment from Specific Countries**, hold down the Ctrl key and select each country from which you accept payment.

*Country-Specific Settings*

2. To set up **Country Specific Credit Card Types**, do the following:
  - a. Tap **Add**.
  - b. Set the **Country**, and choose each **Allowed Credit Card Type**.
  - c. Repeat to identify the credit cards that are accepted from each country.

### Step 5: Complete the PayPal through Braintree Settings

1. Do the following to identify your PayPal through Braintree configuration:
  - a. Enter a **Title** to identify Braintree's payment by PayPal option during checkout.
  - b. In the **Vault Title** field, enter a descriptive title to identify the vault where your customer card information is to be stored.
  - c. In the **Sort Order** field, enter a number to determine the sequence in which Braintree's PayPal payment option appears when listed with other payment options during checkout.
  - d. To display your **merchant name** differently than what is defined in your store configuration, enter the name as you want it to appear in the **Override Merchant Name** field.
2. Set **Payment Action** to one of the following:

Authorize	Approves the purchase and puts a hold on the funds. The amount is not withdrawn from the customer's bank account until the sale is "captured" by the merchant.
Authorize and Capture	The amount of the purchase is authorized and immediately withdrawn from the customer's account.

3. Set **Payment from Applicable Countries** to one of the following for Braintree transactions processed by PayPal:

- All Allowed Countries
- Specific Countries

For **Payment from Specific Countries**, hold down the Ctrl key and select each country from which you accept payment.

4. To require that customers provide a billing address, set **Require Customer's Billing Address** to "Yes."

This feature must first be enabled for your account by PayPal Technical Support.

5. If you want customers to be able to edit the shipping address while completing a PayPal transaction, set **Allow to Edit Shipping Address Entered During Checkout on PayPal Side** to "Yes."
6. To save a log file of interactions between your store and PayPal through Braintree, set **Debug** to "Yes."
7. If you want to bypass the Order Review step before the order is submitted, set **Skip Order Review** to "Yes."

By default, Order Review is the last stage of the checkout process.

8. To display the PayPal button on both the mini shopping cart and shopping cart page, set **Display on Shopping Cart** to "Yes."

**PayPal through Braintree**

**Title** [store view]: PayPal (Braintree)  
It is recommended to set this value to "PayPal" per store views.

**Vault Enabled** [website]: No

**Sort Order** [website]:

**Override Merchant Name** [store view]:

**Payment Action** [website]: Authorize

**Payment from Applicable Countries** [website]: All Allowed Countries

**Payment from Specific Countries** [website]: Afghanistan, Åland Islands, Algeria, American Samoa, Andorra, Angola, Anguilla, Antarctica, Antigua and Barbuda, Argentina

**Require Customer's Billing Address** [website]: No  
This feature needs to be enabled first for the merchant account through PayPal technical support.

**Allow to Edit Shipping Address Entered During Checkout on PayPal Side** [website]: Yes

**Debug** [website]: No

**Skip Order Review** [website]: No

**Display on Shopping Cart** [website]: Yes  
Also affects mini-shopping cart.

*PayPal through Braintree Settings*

## Step 6: Complete the 3D Verification Settings

1. If you want to add a verification step for customers using credit cards that are enrolled in a verification program such as “Verified by VISA,” set **3d Secure Verification** to “Yes.”

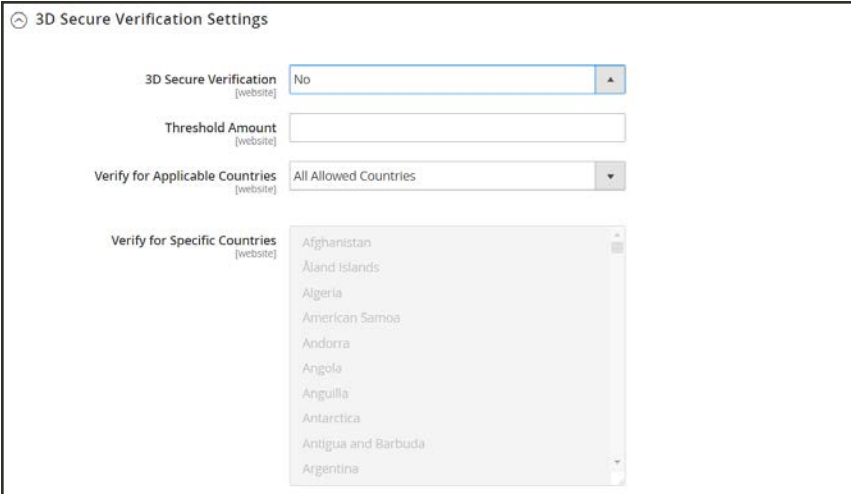
During the process, the transaction amount that is submitted for verification is checked against the amount that is sent for authorization,

2. In the **Threshold Amount** field, enter the maximum amount that is allowed to be processed by Braintree for a single order.

The Threshold Amount defines the maximum amount that is allowed for an authorized sale. Authorization is declined if the order amount exceeds the Threshold Amount.

3. Set **Verify for Applicable Countries** to one of the following:
  - All Allowed Countries
  - Specific Countries

To **Verify for Specific Countries**, hold down the Ctrl key and select each country from which payments are to be verified.

The screenshot shows the '3D Secure Verification Settings' window. It contains four main sections: '3D Secure Verification' with a dropdown menu set to 'No'; 'Threshold Amount' with an empty text input field; 'Verify for Applicable Countries' with a dropdown menu set to 'All Allowed Countries'; and 'Verify for Specific Countries' with a list box containing a scrollable list of countries including Afghanistan, Åland Islands, Algeria, American Samoa, Andorra, Angola, Anguilla, Antarctica, Antigua and Barbuda, and Argentina.

*3D Verification Settings*

### Step 7: Dynamic Descriptors

The following descriptors are used to identify purchases on customer credit card statements. You can reduce the number of chargebacks by clearly identifying the company that is associated with each purchase. If Dynamic Descriptors are not enabled for your account, contact [Braintree support](#).

1. Enter the Dynamic Descriptor for the **Name**, **Phone**, and **URL** according to these guidelines:

Name	<p>There are two parts to the Name descriptor, which are separated by an asterisk (*). For example:</p> <p>company*myproduct</p> <p>The first part of the descriptor identifies the company or DBA, and the second part identifies the product. The length of the Company and Product parts of the descriptor can be allocated in the following ways, for a combined length of up to twenty-two characters.</p> <p><b>Characters in Name Descriptor</b></p> <table> <tr> <th></th><th>Company</th><th>Product</th></tr> <tr> <td>Option 1</td><td>Must be 3 characters</td><td>Up to 18 characters</td></tr> <tr> <td>Option 2</td><td>Must be 7 characters</td><td>Up to 14 characters</td></tr> <tr> <td>Option 3</td><td>Must be 12 characters</td><td>Up to 9 characters</td></tr> </table>			Company	Product	Option 1	Must be 3 characters	Up to 18 characters	Option 2	Must be 7 characters	Up to 14 characters	Option 3	Must be 12 characters	Up to 9 characters
	Company	Product												
Option 1	Must be 3 characters	Up to 18 characters												
Option 2	Must be 7 characters	Up to 14 characters												
Option 3	Must be 12 characters	Up to 9 characters												
Phone	<p>The Phone descriptor must be ten to fourteen characters in length, and can include only numbers, dashes, parentheses, and periods. For example:</p> <p>9999999999</p> <p>(999) 999-9999</p> <p>999.999.9999</p>													
URL	<p>The URL descriptor represents your domain name, and can be up to thirteen characters long. For example: company.com</p>													

2. When your Braintree configuration is complete, tap **Save Config.**

## Other PayPal Solutions

PayPal is a global leader in online payments and a fast and secure way for your customers to pay online. With PayPal and Magento Commerce, you can accept payments from all major debit and credit cards. PayPal offers additional convenience without extra effort, because even your customers who don't have a PayPal account can pay for their purchases with PayPal. In this guide, PayPal payments solutions are organized as follows:

- [Recommended Solutions](#)
- [PayPal All-In-One Payment Solutions](#)
- [PayPal Payment Gateways](#)

The selection of available PayPal solutions varies by merchant location. [PayPal Express Checkout](#) and PayPal Payments Standard can be used in all parts of the world. To learn more, see: [PayPal Solutions by Country](#).

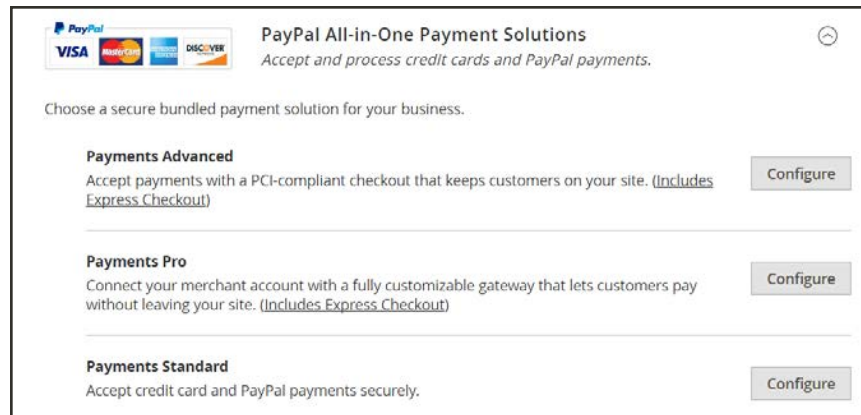
You cannot have more than one PayPal method enabled at a time, with the exception of PayPal Express Checkout. PayPal Express Checkout can be used in combination with other PayPal payment methods, except for PayPal Payments Standard. If you change payment solutions, the one used previously is disabled.



## PayPal All-In-One Payment Solutions

In the United States, PayPal offers the following PCI-compliant solutions to meet the needs of your growing business.

- [PayPal Payments Advanced](#)
- [PayPal Payments Pro](#)
- [PayPal Payments Standard](#)

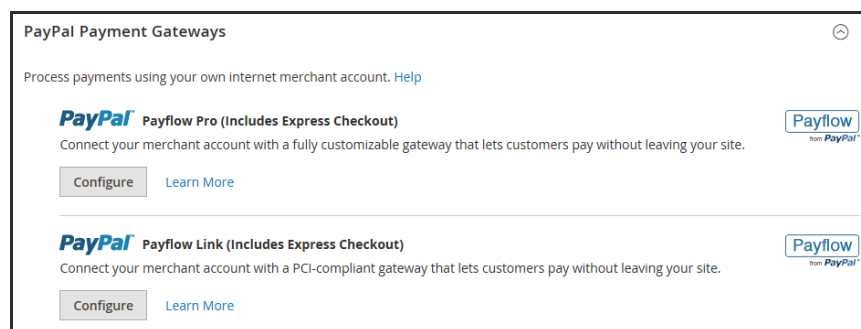


*PayPal All-In-Payment Solutions*

## PayPal Payment Gateways

PayPal offers a choice of two payment gateway solutions for your business. You can let PayPal host your checkout on its secure payment site, or you can take control of the entire payment experience with a completely customizable solution.

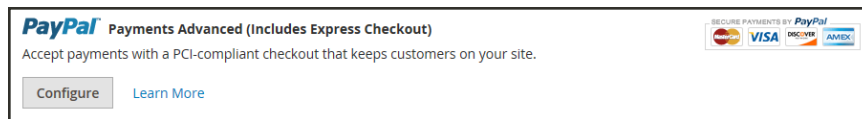
- [PayPal Payflow Pro](#)
- [PayPal Payflow Link](#)



*PayPal Payment Gateways*

## PayPal Payments Advanced

PayPal Payments Advanced is a **PCI-compliant** solution that lets your customers pay by debit or credit card without leaving your site. It includes an embedded checkout page that can be customized to create a seamless and secure checkout experience.



### *PayPal Payments Advanced*

Even customers without a PayPal account can make purchases through PayPal's secure payment gateway. Accepted cards include Visa, MasterCard, Switch/Maestro, and Solo credit cards in the United States and United Kingdom. For additional convenience, PayPal Express Checkout is included with PayPal Payments Advanced.

You can have two PayPal solutions active at the same time: Express Checkout, plus any All-In-One or Payment Gateway solution. If you change payment solutions, the one that was used previously is disabled.

PayPal Payments Advanced cannot be used for orders created from the Admin of your store.

## Requirements



**PayPal Business Account**



If you manage multiple Magento websites, you must have a separate PayPal merchant account for each website.

## Checkout Workflow

- 1 Customer Chooses Payment Method.** During checkout, the customer chooses to pay with PayPal Payments Advanced. The Pay Now button appears instead of the Place Order button.
- 2 Pay Now.** The customer taps Pay Now, and a PayPal-hosted form appears. The customer enters the card information, and the card is verified. If successful, the order confirmation page appears.  
**Pay with PayPal.** The form also includes the Pay with PayPal button, which redirects the customer to the PayPal site, where payment can be made with PayPal Express Checkout.
- 3 Troubleshooting.** If the transaction fails for any reason, an error message appears on the checkout page and the customer is instructed to try again. Any issues are managed by PayPal.

## Order Processing Workflow

Processing orders with PayPal Payments Advanced is the same as for any regular PayPal order. Orders are invoiced and shipped, and credit memos generated for both online and offline refunds. However, multiple online refunds are not available for orders paid with PayPal Payments Advanced.

- 1 Customer Places Order.** In the final stage of checkout, the customer taps the Place Order button.
- 2 PayPal Responds.** PayPal evaluates the request. If found to be valid, PayPal processes the transaction.

3

**Magento Sets Order Status.** Magento receives response from PayPal, and sets the order status to one of the following:

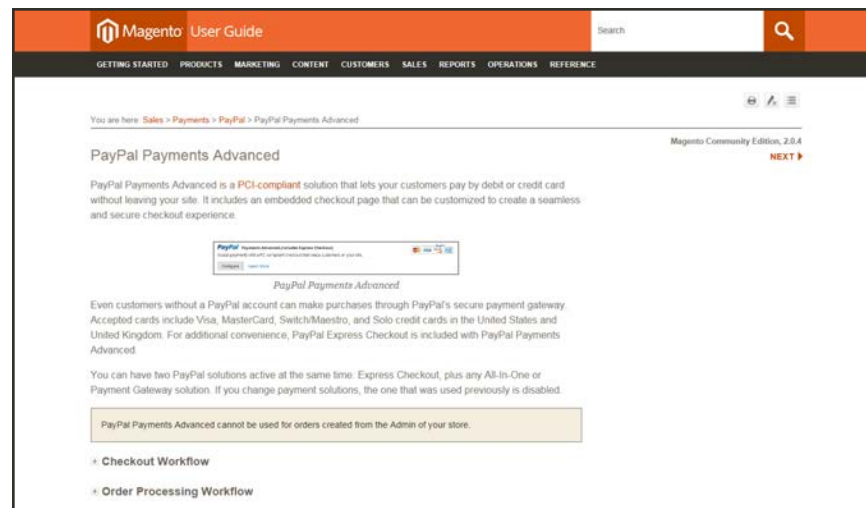
Processing	The transaction was successful.
Pending Payment	The system did not receive any response from PayPal.
Canceled	The transaction was not successful for some reason.
Suspected Fraud	The transaction did not pass some of the <a href="#">PayPal fraud filters</a> . The system receives the response from PayPal that the transaction is under review by Fraud Service.

4

**Merchant Fulfills Order.** The merchant invoices and ships the order.

## Setting Up PayPal Payments Advanced

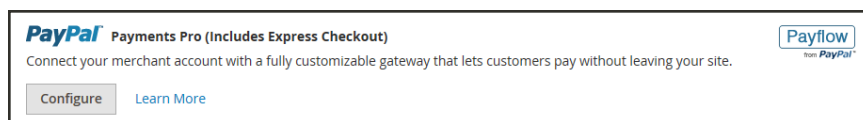
For step-by-step configuration instructions, see [PayPal Payments Advanced](#) in the Magento Commerceonline user guide.



*Setting Up PayPal Payments Advanced*

## PayPal Payments Pro

PayPal Payments Pro brings you all the benefits of a merchant account and payment gateway in one, plus the ability to create your own, fully customized checkout experience. PayPal Express Checkout is automatically enabled with PayPal Payments Pro, so you can tap into more than 110 million active PayPal users.



### *PayPal Payments Pro*

For merchants outside the US, this method is called “PayPal Website Payments Pro.”

You can have two PayPal solutions active at the same time: PayPal Express Checkout, plus any one of the All-In-One solutions. If you change payment solutions, the one used previously is automatically disabled.

## Requirements



**PayPal Merchant Account** (with Direct Payments Activated)

## Checkout Workflow

1

**Customer Goes to Checkout.** Customer adds products to cart, and taps Proceed to Checkout.

2

**Customer Chooses Payment Method.** During checkout, customer chooses the PayPal Direct Payment option, and enters the credit card information.

- If paying with PayPal Payments Pro, the customer stays on your site during the checkout process.
- If paying with PayPal Express Checkout, the customer is redirected to the PayPal site to complete the transaction.

At the customer's request, the store administrator can also create an order from the Admin, and process the transaction with PayPal Payments Pro.

## Order Processing Workflow

1

**Order Placed.** The order can be processed either the Admin of your store, or from your PayPal merchant account.

2

**Payment Action.** The payment action specified in the configuration is applied to the order. Options include:

Authorize	Magento creates a sales order with the “Processing” status. In this case, the amount of money to be authorized is pending approval.
Sale	Magento creates both a sales order and invoice.
Capture	PayPal transfers the order amount from the buyer’s balance, bank account or credit card to the merchant’s account.

3

**Invoicing.** An invoice is created in Magento after PayPal sends an instant payment notification message to Magento.

Make sure that instant payment notifications are enabled in your PayPal merchant account.

If required, an order can be partially invoiced for a specified quantity of products. For each partial invoice submitted, a separate Capture transaction with a unique ID becomes available, and a separate invoice is generated.

Authorization-only payment transactions are closed only after the full order amount is captured.

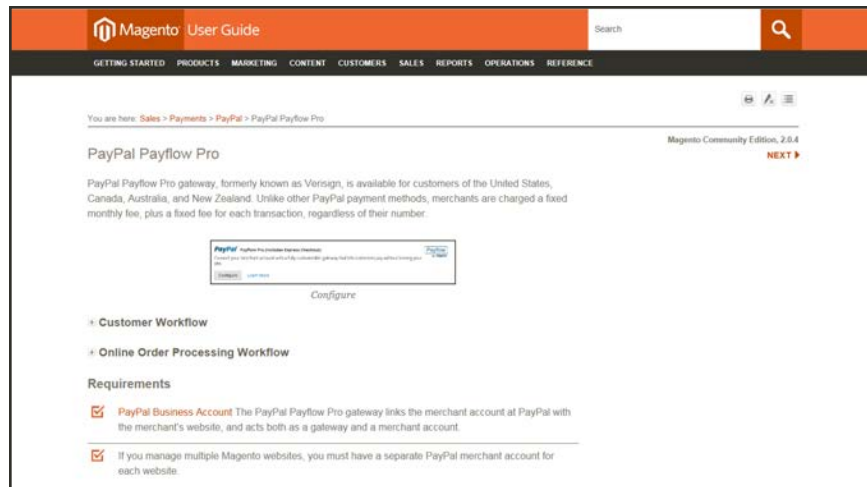
An order can be voided online at any time until the order amount is fully invoiced.

4

**Returns.** If for any reason the customer returns the purchased products and claims a refund, as with order amount capturing and invoice creation, you can create an online refund either from the Admin or from your PayPal merchant account.

## Setting Up PayPal Payments Pro

For step-by-step configuration instructions, see [PayPal Payments Pro](#) in the Magento Commerce online user guide.



### *Setting Up PayPal Payment Pro*

## PayPal Payments Standard

PayPal Payments Standard is the easiest way to accept payments online. You can offer your customers the convenience of payment both by credit card and PayPal by simply adding a checkout button to your store.



*PayPal Payments Standard*

For merchants outside the US, this method is called “PayPal Website Payments Standard.”

With PayPal Payments Standard, you can swipe credit cards on mobile devices. There is no monthly fee, and you can get paid on eBay. Supported credit cards include Visa, MasterCard, Discover, and American Express. In addition, customers can pay directly from their personal PayPal accounts. PayPal Payments Standard is available in all countries on the PayPal worldwide reference list.

## Merchant Requirements



PayPal Business Account

## Checkout Workflow

For customers, PayPal Payments Standard is a one-step process if the credit card information the their personal PayPal accounts is up to date.

1

**Customer Places Order.** The customer taps the “Pay Now” button to complete the purchase.

2

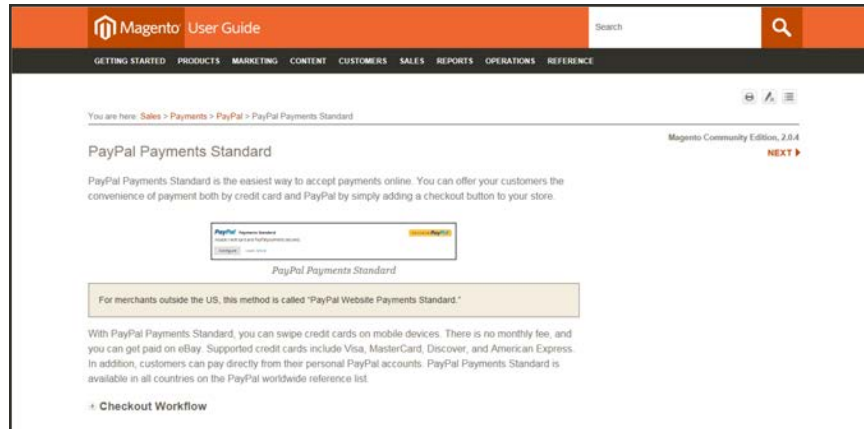
**PayPal Processes the Transaction.** The customer is redirected to the PayPal site to complete the transaction.



## Setting Up PayPal Payments Standard

PayPal Payments Standard cannot be used simultaneously with any other PayPal method, including Express Checkout. If you change payment solutions, the one used previously is disabled.

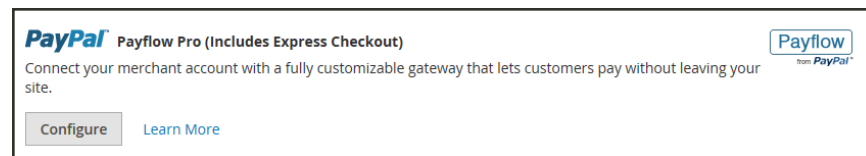
For step-by-step configuration instructions, see [PayPal Payments Standard](#) in the online user guide.



### *Setting Up PayPal Payments Standard*

## PayPal Payflow Pro

PayPal Payflow Pro gateway, formerly known as Verisign, is available for customers of the United States, Canada, Australia, and New Zealand. Unlike other PayPal payment methods, merchants are charged a fixed monthly fee, plus a fixed fee for each transaction, regardless of their number.



*Configure*

## Requirements

- ☒ **PayPal Business Account**  
The PayPal Payflow Pro gateway links the merchant account at PayPal with the merchant's website, and acts both as a gateway and a merchant account.
- ☒ If you manage multiple Magento websites, you must have a separate PayPal merchant account for each website.

## Customer Workflow

- 1 Customer Goes to Checkout.** During checkout, the customer chooses to pay with PayPal PayFlow Pro, and enters the credit card information.  
Customers are not required to have personal PayPal accounts. However, depending on the merchant country, customers can also use their personal PayPal account to pay for the order.
- 2 Customer Submits Order.** The customer submits the order, and the order information is sent to PayPal for processing. The customer does not leave the checkout page of your site.
- 3 PayPal Completes the Transaction.** Payments are accepted at the time the order is placed. Depending on the payment action specified in the configuration, either a sales order or a sales order and an invoice is created.

## Online Order Processing Workflow

1

**Administrator Submits Online Invoice.** The store administrator submits an online invoice, and as a result a corresponding transaction and an invoice is created.

2

**PayPal Receives the Transaction.** The order information is sent to PayPal. A record of the transaction and an invoice is generated. You can view all Payflow Pro Gateway transactions in your [PayPal merchant account](#).

Partial invoices and partial refunds are not supported by PayPal Payflow Pro.

### Step 1: Configure Your PayPal Account

1. Before you begin, set up your PayPal Payments Advanced account on the PayPal website.
  - a. Log in to your [PayPal business account](#).
  - b. Go to **Service Settings > Hosted Checkout Pages > Set Up Menu**, and make the following settings:

AVS:	No
CSC:	No
Enable Secure Token:	Yes

- c. **Save** the settings.

If you have multiple Magento websites, you must create a separate PayPal Payments Advanced account for each.

2. When prompted to create a layout, do the following:
  - a. At the top of the page, tap **Customize**.
  - b. Choose **Layout C**.
  - c. Tap **Save and Publish**.
3. PayPal recommends that you set up an additional user on your account. To set up an additional user, do the following:
  - a. Log in to your [PayPal business account](#).
  - b. Follow the instructions to set up an additional user.
  - c. **Save** the changes.

## Step 2: Complete the Required Settings

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**, and do the following:
  - a. In the panel on the left, under **Sales**, choose **Payment Methods**.
  - b. If your Magento installation has multiple websites, stores or views, set **Store View** to the store view where the configuration applies.
  - c. In the **Merchant Location** section, select the **Merchant Country** where your business is located.

This setting determines the selection of PayPal Solutions that appear in the configuration.

2. Under **PayPal Payment Gateways**, in the **PayPal Payflow Pro** section, tap **Configure**. Then in the **Required PayPal Settings** section under Payments Pro and Express Checkout, do the following:
  - a. (Optional) Enter the **Email Associated with your PayPal Merchant Account**.

**Important!** Email addresses are case sensitive. To receive payment, the email address must match the email address specified in your PayPal merchant account.

If you don't yet have a PayPal account, click the link, **Start accepting payments via PayPal**.

- b. Enter one of the following credentials that you use to log in to your PayPal merchant account:
 

Partner	Your PayPal Partner ID.
User	The ID of an additional user who is set up on your PayPal account.
Vendor	Your PayPal user login name.

- c. Enter the **Password** that is associated with your PayPal account.
  - d. If you want to run test transactions, set **Test Mode** to "Yes."

When testing the configuration in a sandbox, use only **credit card numbers** that are recommended by PayPal. When you are ready to "go live," return to the configuration and set Test Mode to "No."

3. If your system uses a proxy server to establish the connection to the PayPal system, set **Use Proxy** to "Yes." Then, do the following:
  - a. Enter the IP address of the **Proxy Host**.
  - b. Enter the port number of the **Proxy Port**.

A proxy is used when the server firewall prevents direct access to the PayPal server. In such a case, a third-party server is used to relay traffic.

Payflow Pro and Express Checkout

Email Associated with PayPal Merchant Account (Optional)

?

[WEBSITE]

Start accepting payments via PayPal

Partner

[WEBSITE]

User

[WEBSITE]

Vendor

[WEBSITE]

Password

[WEBSITE]

Test Mode

No

[WEBSITE]

Use Proxy

No

[WEBSITE]

### Required Settings

4. Set **Enable This Solution** to “Yes.”
5. If you want to offer PayPal Credit to your customers, set **Enable PayPal Credit** to “Yes.”

Enable this Solution

No

[WEBSITE]

Enable PayPal Credit

No

[WEBSITE]

PayPal Express Checkout Payflow Edition lets you give customers access to financing through PayPal Credit® - at no additional cost to you. You get paid up front, even though customers have more time to pay. A pre-integrated payment button lets customers pay quickly with PayPal Credit®. [Learn More](#)

### Enable PayPal Payflow Pro

## Step 3: Advertise PayPal Credit (Optional)

1. Expand the **Advertise PayPal Credit** section. Then, do the following:
  - a. Tap **Get Publisher ID from PayPal**, and follow the instructions to get your account information.
  - b. Enter your **Publisher ID**.

Advertise PayPal Credit

[Why Advertise Financing?](#)

**Give your sales a boost when you advertise financing.**

PayPal helps turn browsers into buyers with financing from PayPal Credit®. Your customers have more time to pay, while you get paid up front – at no additional cost to you. Use PayPal's free banner ads that let you advertise PayPal Credit® financing as a payment option when your customers check out with PayPal. The PayPal Advertising Program has been shown to generate additional purchases as well as increase consumer's average purchase sizes by 15% or more. [See Details.](#)

Publisher ID

[WEBSITE]

Required to display a banner

Get Publisher ID from PayPal

*Advertise PayPal Credit*

2. Expand  the **Home Page** section. Then, do the following:

- a. To place a banner on the page, set **Display** to “Yes.”
- b. Set **Position** to one of the following:
  - Header (center)
  - Sidebar (right)
- c. Set **Size** to one of the following:
  - 190 x 100
  - 234 x 60
  - 300 x 50
  - 468 x 60
  - 728 x 90
  - 800 x 66

Home Page

Display

No

▼

[WEBSITE]

Position

Header (center)

▼

[WEBSITE]

Size

190 x 100

▼

[WEBSITE]

*Advertise PayPal Credit Home Page Settings*

3. Repeat the previous step for the remaining sections:

- Catalog Category Page
- Catalog Product Page
- Checkout Cart Page

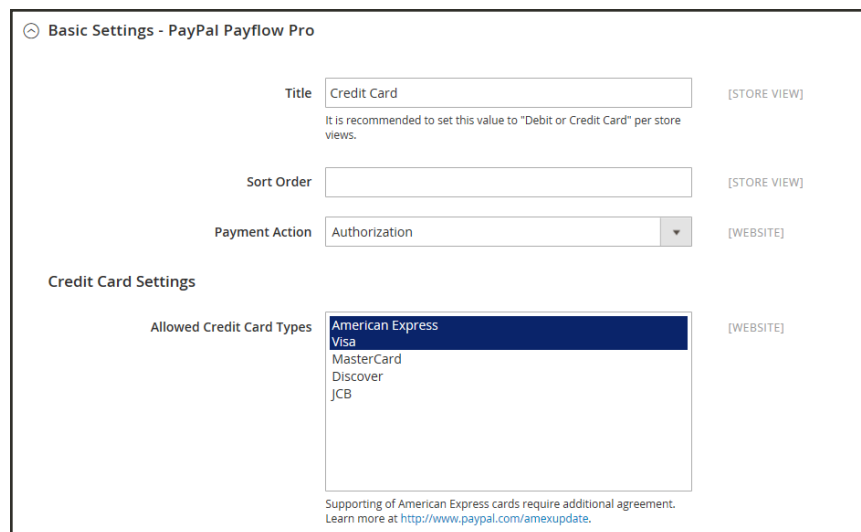
### Step 4: Complete the Basic Settings

1. In the **Basic Settings - PayPal Payflow Pro** section, enter a **Title** to identify PayPal Payflow Pro during checkout. It is recommended that you use the title “Debit or Credit Card.”
2. If you offer multiple payment methods, enter a number in the **Sort Order** field to determine the sequence in which PayPal Payflow Pro appears when listed with other payment methods during checkout.
3. Set **Payment Action** to one of the following:

Authorization	Approves the purchase, but puts a hold on the funds. The amount is not withdrawn until it is “captured” by the merchant.
Sale	The amount of the purchase is authorized and immediately withdrawn from the customer’s account.

4. Under **Credit Card Settings**, select each credit card that you accept for payment in your store. To make multiple selections, hold down the Ctrl key and click each item.

American Express requires an additional agreement.



Basic Settings - PayPal Payflow Pro

Title: Credit Card [STORE VIEW]  
It is recommended to set this value to "Debit or Credit Card" per store views.

Sort Order: [STORE VIEW]

Payment Action: Authorization [WEBSITE]


Credit Card Settings

Allowed Credit Card Types: American Express, Visa, MasterCard, Discover, JCB [WEBSITE]

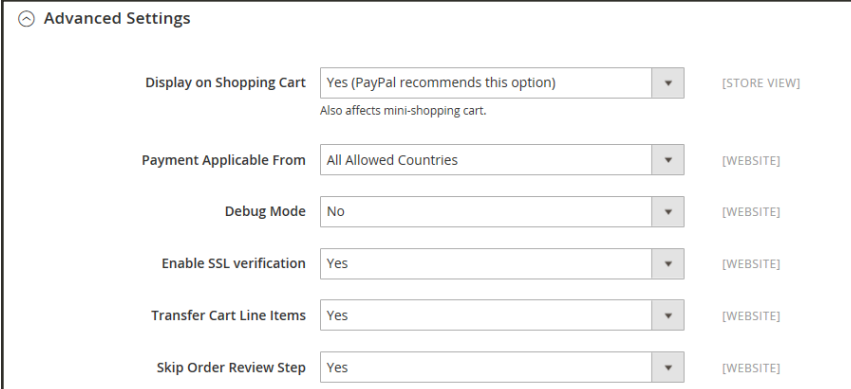
Supporting of American Express cards require additional agreement.  
Learn more at <http://www.paypal.com/amexupdate>.

### Basic Settings


## Step 5: Complete the Advanced Settings

1. Expand  the **Advanced Settings** section. Then, do the following:
    - a. Set **Payment Applicable From** to one of the following:
 

All Allowed Countries	Accepts payment from the countries already specified in your configuration.
Specific Countries	Accepts payments from only the countries you specify. Hold the Ctrl key down and in the Payment Applicable From list, click each country where you accept payment.
    - b. Set **Debug Mode** to “Yes” to write communications with the payment system into the log file.
- In accordance with PCI Data Security Standards, credit card information is not recorded in the log file.
- c. To enable host authenticity verification, set **Enable SSL Verification** to “Yes.”
  - d. To require that customers enter a CVV code, set **Require CVV Entry** to “Yes.”

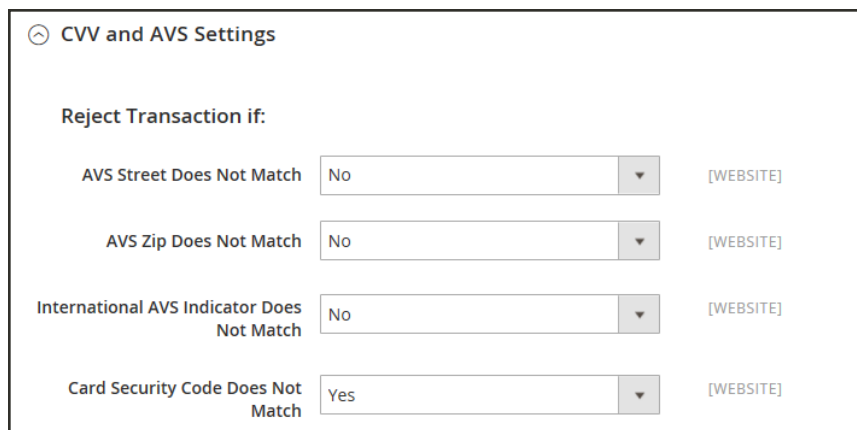


*Advanced Settings*

2. Expand  the **CVV and AVS Settings** section.
3. To determine when a transaction should be rejected when the Address Verification System identifies a mismatch, specify how to handle each of the following scenarios:
  - a. To reject a transaction based on a mismatched street mismatch, set AVS Street Does Not Match to “Yes.”
  - b. To reject a transaction based on a mismatched ZIP code, set AVS Zip Does Not Match to “Yes.”
  - c. To reject a transaction based on mismatched country identifier, set International AVS Indicator Does Not Match to “Yes.”



- d. To reject a transaction based on a mismatched CVV code, set Card Security Code Does Not Match to “Yes.”




CVV and AVS Settings		
<b>Reject Transaction if:</b>		
AVS Street Does Not Match	No	[WEBSITE]
AVS Zip Does Not Match	No	[WEBSITE]
International AVS Indicator Does Not Match	No	[WEBSITE]
Card Security Code Does Not Match	Yes	[WEBSITE]

*CVV and AVS Settings*

4. Complete the following, as needed for your store:

### Settlement Report Settings

1. Expand  the **Settlement Report Settings** section.
2. If you have signed up for PayPal’s Secure FTP Server, enter the following SFTP login credentials:
  - Login
  - Password
3. To run test reports before “going live” with Express Checkout on your site, set **Sandbox Mode** to “Yes.”
4. Enter the **Custom Endpoint Hostname or IP Address**. By default, the value is: reports.paypal.com
5. Enter the **Custom Path** where reports are saved. By default, the value is: /ppreports/outgoing
6. To generate reports according to a schedule, under Scheduled Fetching, make the following settings:
  - a. Set **Enable Automatic Fetching** to “Yes.”
  - b. Set **Schedule** to one of the following:

- Daily
- Every 3 Days
- Every 7 Days
- Every 10 Days
- Every 14 Days
- Every 30 Days
- Every 40 Days

PayPal retains each report for forty-five days.

- Set **Time of Day** to the hour, minute, and second when you want the reports to be generated.

The screenshot shows the 'Settlement Report Settings' interface. It is divided into two main sections: 'SFTP Credentials' and 'Scheduled Fetching'.

**SFTP Credentials Section:**

- Login:** A text input field with a '[WEBSITE]' label to its right.
- Password:** A text input field with a '[WEBSITE]' label to its right.
- Sandbox Mode:** A dropdown menu currently set to 'No', with a '[WEBSITE]' label to its right.
- Custom Endpoint Hostname or IP-Address:** A text input field with a help icon (?) and a '[WEBSITE]' label to its right. Below the field, it says 'By default it is "reports.paypal.com".'
- Custom Path:** A text input field with a '[WEBSITE]' label to its right. Below the field, it says 'By default it is "/ppreports/outgoing".'

**Scheduled Fetching Section:**

- Enable Automatic Fetching:** A dropdown menu currently set to 'No', with a '[WEBSITE]' label to its right.
- Schedule:** A dropdown menu currently set to 'Daily', with a '[GLOBAL]' label to its right. Below the field, it says 'PayPal retains reports for 45 days.'
- Time of Day:** Three dropdown menus for hour, minute, and second, each with a '[GLOBAL]' label to its right. The first two are currently set to '00'.

*PayPal Settlement Report Settings*

## Frontend Experience Settings

The frontend experience settings give you the opportunity to choose which PayPal logos appear on your site, and to customize the appearance of your PayPal merchant pages.

- Expand the **Frontend Experience Settings** section.
- Choose the **PayPal Product Logo** that you want to appear in the PayPal block in your store. The PayPal logos are available in four styles and two sizes. Options include:

- No Logo
  - We Prefer PayPal (150 x 60 or 150 x 40)
  - Now Accepting PayPal (150 x 60 or 150 x 40)
  - Payments by PayPal (150 x 60 or 150 x 40)
  - Shop Now Using (150 x 60 or 150 x 40)
3. To customize the appearance of your PayPal merchant pages, do the following:
- a. Enter the name of the **Page Style** that you want to apply to your PayPal merchant pages. Options include:
 

paypal	Uses the PayPal page style.
primary	Uses the page style that you identified as the “primary” style in your account profile.
your_custom_ value	Uses a custom payment page style, which is specified in your account profile.
  - b. In the **Header Image URL** field, enter the URL of the image that you want to appear in the upper-left corner of the payment page. The maximum file size is 750 pixels wide by 90 pixels high.

PayPal recommends that the image be located on a secure (https) server. Otherwise, the customer’s browser may warn that “the page contains both secure and nonsecure items.”

- c. Enter the six-character hexadecimal code, without the “#” symbol, for each of the following:
 

Header Background Color	Background color for the checkout page header.
Header Border Color	2-pixel border around the header.
Page Background Color	Background color for the checkout page and around the header and payment form.

The screenshot shows the 'Frontend Experience Settings' panel for PayPal. It includes a 'PayPal Product Logo' dropdown menu currently set to 'Now accepting PayPal (150 X 60)', with a note that it 'Displays on catalog pages and homepage.' Below this is the 'PayPal Merchant Pages Style' section, which contains five input fields: 'Page Style', 'Header Image URL', 'Header Background Color', 'Header Border Color', and 'Page Background Color'. Each field has a corresponding '[STORE VIEW]' link and a help icon.

*PayPal Frontend Experience Settings*

## Step 6: Basic Settings - PayPal Express Checkout

1. Expand ☺ the **Basic Settings - PayPal Express Checkout** section.
2. Enter a **Title** to identify this payment method during checkout. It is recommended to set the title to “PayPal” for each store view.
3. If you offer multiple payment methods, enter a number in the **Sort Order** field to determine the sequence in which PayPal Payments Standard is listed with the other methods. Payment methods appear in ascending order based on the Sort Order value.
4. Set **Payment Action** to one of the following:

Authorization	Approves the purchase, but puts a hold on the funds. The amount is not withdrawn until it is “captured” by the merchant.
Sale	The amount of the purchase is authorized and immediately withdrawn from the customer’s account.

5. To display the “Check out with PayPal” button on the product page, set **Display on Product Details Page** to “Yes.”

Basic Settings - PayPal Express Checkout

Title	PayPal Express Checkout Payments Pro Edition	[STORE VIEW]
Sort Order		[STORE VIEW]
Payment Action	Authorization	[WEBSITE]
Display on Product Details Page	Yes	[STORE VIEW]

*Express Checkout Basic Settings*

## Step 7: Advanced Settings - PayPal Express Checkout

1. Click to expand the **Advanced Settings** section. Then, do the following:

- a. Set **Display on Shopping Cart** to “Yes.”

- b. Set **Payment Applicable From** to one of the following:

All Allowed Countries	Accepts payment from the countries already specified in your configuration.
-----------------------	---

Specific Countries	Accepts payments from only the countries you specify. Hold the Ctrl key down and in the Payment Applicable From list, click each country where you accept payment.
--------------------	--

- c. Set **Debug Mode** to “Yes” to write communications with the payment system into the log file.

In accordance with PCI Data Security Standards, credit card information is not recorded in the log file.

- d. To enable host authenticity verification, set **Enable SSL Verification** to “Yes.”

- e. To display a full summary of the customer’s order by line item from the PayPal site, set **Transfer Cart Line Items** to “Yes.”

- f. To allow the customer to complete the transaction from the PayPal site without returning to your Magento store for Order Review, set **Skip Order Review Step** to “Yes.”

⌵

Advanced Settings

Display on Shopping Cart	Yes (PayPal recommends this option) <small>Also affects mini-shopping cart.</small>	[STORE VIEW]
Payment Applicable From	All Allowed Countries	[WEBSITE]
Debug Mode	No	[WEBSITE]
Enable SSL verification	Yes	[WEBSITE]
Transfer Cart Line Items	Yes	[WEBSITE]
Skip Order Review Step	Yes	[WEBSITE]

*Express Checkout Advanced Settings*

2. When complete, tap **Save Config.**

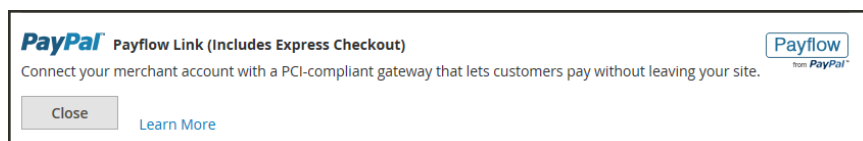
### Step 8: Add Google reCAPTCHA

To better protect PayPal PayFlow Pro checkout, enable Google reCAPTCHA. It includes options to run reCAPTCHA using a clickable interface or an invisible check to validate the customer. We recommend the invisible option to increase sales conversion and protect your store.

For details, see [Google reCAPTCHA](#).

## PayPal Payflow Link

PayPal PayFlow Link is available for merchants in the United States and Canada only. Customers are not required to have a personal PayPal account, and enter their credit card information in a form that is hosted by PayPal. The information is never stored on your Magento server. PayFlow Link cannot be used for orders that are created from the Admin.



### Configure

Credit memos are supported for both online and offline refunds. However, multiple online refunds are not supported.

## Requirements



### PayPal Business Account

The PayPal Payflow Pro gateway links the merchant account at PayPal with the merchant's website, and acts both as a gateway and a merchant account.



If you manage multiple Magento websites, you must have a separate PayPal merchant account for each website.

## Customer Workflow

1

**Customer Goes to Checkout.** During checkout, the customer chooses to pay with PayPal PayFlow link, and enters the credit card information.

The customer is not required to have a personal PayPal account.

2

**Customer Chooses Pay Now.** The customer taps the Pay Now button to submit the order.

3

**Customer Enters Credit Card Info.** The customer enters the credit card information on a form that is hosted by PayPal/

If the customer clicks the Cancel Payment link, the customer returns to the Payment Information stage of checkout, and the order status changes to "Canceled."

4

**Customer Submits the Order.** The credit card information is submitted directly to PayPal, and is not retained anywhere on the Magento site.

## Order Workflow

1

**PayPal Receives Request.** PayPal receives the request from the customer to Pay Now.

2

**PayPal Verifies the Payment Information.** PayPal verifies the credit card information, and assigns the appropriate status.

**Payment Verified:** If verified, the “Pending Payment” the applicable status is initially assigned to the order until the transaction is settled.

Processing	The transaction was successful.
Pending Payment	The system did not receive any response from PayPal.
Canceled	The transaction was not successful for some reason.
Suspected Fraud	The transaction did not pass some of the <b>PayPal fraud filters</b> . The system receives the response from PayPal that the transaction is under review by Fraud Service.

**Cancel Payment.** If the customer clicks the Cancel Payment link, the customer returns to the Payment Information stage of checkout, and the order status changes to “Canceled.”

3

**Customer Is Redirected to Confirmation Page.** If the transaction completes successfully, the customer is redirected to the order confirmation page in your store.

If the transaction fails on any reason, an error message appears on the checkout page and the customer is directed to repeat the checkout process. These situations are managed by PayPal.

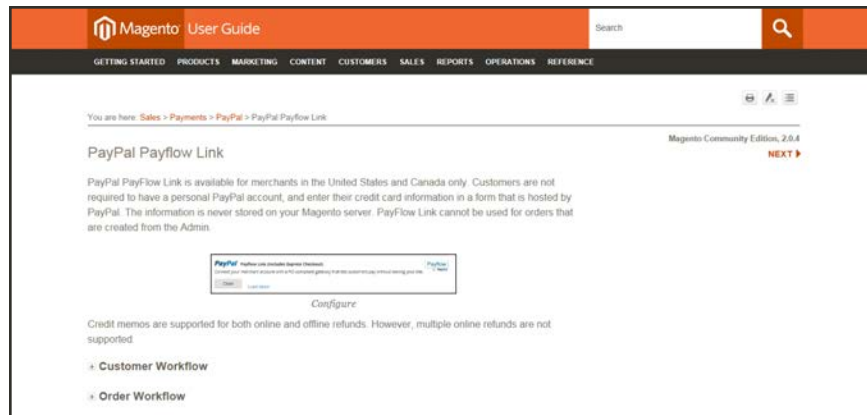
4

**Merchant Fulfills Order.** The merchant invoices, and ships the order as usual.



## Setting Up PayPal Payflow Link

For step-by-step configuration instructions, see [PayPal Payflow Link](#) in the Magento Commerceonline user guide.



*PayPal Payflow Link Setup*

## PayPal Quick Reference

PAYPAL SOLUTION	DESCRIPTION
<b>EXPRESS CHECKOUT</b>	
PayPal Express Checkout	
<b>ALL-IN-ONE SOLUTIONS</b>	
<b>PayPal Payments Advanced</b> (Includes Express Checkout)	Allows you to accept payments with a PCI-compliant checkout that keeps customers on your site.
<b>PayPal Payments Pro</b> (Includes Express Checkout) <b>PayPal Website Payments Pro</b> (Outside US)	Allows you to accept payments with a completely customizable checkout.
<b>PayPal Payments Standard</b> (Includes Express Checkout) <b>PayPal Website Payments Standard</b> (Outside US)	Adds PayPal as an additional payment method to your checkout page.
<b>PAYMENT GATEWAYS</b>	
PayPal Payflow Pro (Includes Express Checkout)	Connects your merchant account with a fully customizable gateway that lets customers pay without leaving your site.
PayPal Payflow Link (Includes Express Checkout)	Connects your merchant account with a PCI-compliant gateway that lets customers pay without leaving your site.
<b>OTHER PAYPAL SOLUTIONS</b>	
PayPal Integral Evolution	
PayPal Pasarela Integral	
PayPal Pro	
PayPal Website Payments Plus	
PayPal Website Payments Pro Hosted Solution	
PayPal Payments Pro Hosted Solution (includes Express Checkout)	

## PayPal Business Account

To offer PayPal as a payment method in your store, you must have a PayPal **business account** and/or a PayPal Payflow account. The account requirements are specified in the description of each PayPal solution. Your PayPal merchant account is also used to manage any **fraud filters** that are applied to purchases made from your store.

Customers who use PayPal Express Checkout or Express Checkout for Payflow Pro must have a PayPal buyer account. PayPal Payments Standard (which is some countries is called Website Payments Standard) can be used directly or through a buyer account, provided that the merchant enables PayPal Account Optional. By default, this parameter is enabled. Customers can choose to enter their credit card information, or create a buyer account with PayPal. When disabled, customers must first create a PayPal buyer account before making a purchase.

Website Payments Pro, Website Payments Pro Payflow Edition, Payflow Pro Gateway, and Payflow Link require customers to enter credit card information during checkout.

## PayPal Credit

PayPal Credit offers your customers quick access to financing, so they can buy now and pay later, at no additional cost to you. You are not charged when customers choose PayPal Credit, and pay only your normal PayPal transaction fee.

According to a recent study, nearly 40% of PayPal Credit users say they spent more online because financing was available. Plus, their transactions are up to 68% larger than credit/debit purchases.<sup>1</sup> To learn more, see **PayPal Credit** on the PayPal website.

Give your sales a boost when you advertise financing. PayPal helps turn browsers into buyers with financing with PayPal Credit. Your customers can pay over time, while you get paid up front – at no additional cost to you. Use PayPal's free banner ads that let you advertise PayPal Credit financing as a payment option when your customers check out with PayPal. The PayPal Advertising Program has been shown to generate additional purchases as well as increase consumer's average purchase sizes by 15% or more.

You can easily add free, ready-made banner ads to pages of your site, and the PayPal Credit button to your shopping cart during checkout to remind your customers that financing is readily available.



### PayPal Credit Button

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Add a PayPal Credit button to your cart to make it easier for your customers to make a purchase.



## PayPal Credit Banners

---

Use banners on your home page, product pages, and shopping cart to turn “window shoppers” into buyers.

For US merchants, PayPal Credit is included as a PayPal Express Checkout option, and is available with PayPal All-In-One Solutions (Payment Advanced, Payments Pro, and Payments Standard) and PayPal Payment Gateways (PayFlow Pro and PayFlow Link). Before you configure PayPal Credit for your Magento store, make sure it is enabled in your PayPal account.

<sup>1</sup> As reported in Nielsen’s PayPal Credit Average Order Value Study for activity occurring from April 2015 to March 2016 (small merchants) and October 2015 to March 2016 (midsize merchants), which compared PayPal Credit transactions to credit and debit card transactions on websites that offer PayPal Credit as a payment option or within the PayPal Wallet. Nielsen measured 284890 transactions across 27 mid and small merchants. Copyright Nielsen 2016.

## PayPal Fraud Management Filter

PayPal fraud management filters make it easier to detect and respond to fraudulent transactions, and can be configured to flag, hold for review, or deny riskier payments. Magento **order status** values changed according to the fraud filter settings.

### Filter Actions

ACTION	DESCRIPTION
Review	<p>If you set the filter action to “Review,” the suspected order receives the status “Payment Review” when the order is placed. You can review the order and approve, or cancel the payment in the Admin, or on the PayPal side. When you click the Accept Payment or the Deny Payment buttons, no new transactions for the order are created.</p> <p>If you change the status of the transaction on the PayPal site, you must click the Get Payment Update button in the upper-right corner of the Order page in the Admin to apply the changes. If you click Accept Payment or Deny Payment, the changes made at the PayPal site are applied.</p>
Deny	<p>If you set the filter action to “Deny,” the suspected order cannot be placed by the customer, because the corresponding transaction is rejected by PayPal.</p> <p>To deny the payment from the Admin, click the Deny Payment button in the upper-right corner of the page. The order status changes to “Canceled,” the transaction is reverted, and funds are released on the customer’s account. The corresponding information is added in the Comments History section of the order view.</p>
Flag	<p>If you set the filter action to “Flag”, the suspected order gets the status “Processing” when it is placed. The corresponding transaction is marked with a “flag” in the list of the merchant account transactions.</p>

## PayPal by Country

### PayPal Payment Solutions

COUNTRY	PAYPAL PAYMENT SOLUTION
Australia	PayPal Website Payments Standard PayPal Payflow Pro PayPal Website Payments Pro Hosted Solution PayPal Express Checkout
Canada	PayPal Website Payments Standard PayPal Website Payments Pro PayPal Payflow Pro PayPal Payflow Link (includes Express Checkout) PayPal Express Checkout
France	PayPal Integral Evolution PayPal Website Payments Standard PayPal Express Checkout
Germany	PayPal Express Checkout
Hong Kong SAR China	PayPal Website Payments Pro Hosted Solution PayPal Website Payments Standard PayPal Express Checkout
Italy	PayPal Pro PayPal Payments Standard PayPal Express Checkout
Japan	PayPal Website Payments Plus PayPal Website Payments Standard PayPal Express Checkout
New Zealand	PayPal Payflow Pro PayPal Website Payments Standard PayPal Express Checkout
Spain	PayPal Pasarela Integral PayPal Website Payments Standard PayPal Express Checkout

**PayPal Payment Solutions (cont.)**

COUNTRY	PAYPAL PAYMENT SOLUTION
United Kingdom	PayPal Payments Pro Hosted Solution (includes Express Checkout) PayPal Payments Standard PayPal Express Checkout
United States	PayPal Payments Advanced (Includes Express Checkout) PayPal Payments Pro (Includes Express Checkout) PayPal Payments Standard+ PayPal Payflow Pro (Includes Express Checkout) PayPal Payflow Link (Includes Express Checkout) PayPal Express Checkout

**OTHER COUNTRIES**

PayPal Express Checkout and PayPal Website Payments Standard are available in the following countries:

Argentina, Austria, Belgium, Brazil, Bulgaria, Chile, Costa Rica, Cyprus, Czech Republic, Denmark, Dominican Republic, Ecuador, Estonia, Finland, French Guiana, Gibraltar, Greece, Guadeloupe, Hungary, Iceland, India, Indonesia, Ireland, Israel, Jamaica, Latvia, Liechtenstein, Lithuania, Luxembourg, Malaysia, Malta, Martinique, Mexico, Netherlands, Norway, Philippines, Poland, Portugal, Réunion, Romania, San Marino, Singapore, Slovakia, Slovenia, South Africa, South Korea, Sweden, Switzerland, Taiwan, Thailand, Turkey, United Arab Emirates, Uruguay, Venezuela, Vietnam







## CHAPTER 67:

# Other Payment Methods

Magento Commerce supports the following payment solution that offer merchant services in all parts of the world. Unlike some payment solutions that transfer control to another site to complete the transaction, a payment gateway makes it possible for you to accept credit card payments directly from your store without the customer leaving your site.

- [Authorize.Net Direct Post](#)
- [Cybersource](#)
- [eWAY](#)
- [Worldpay](#)

## Authorize.Net Direct Post

Authorize.Net handles all steps in the transaction process — such as payment data collection, data submission, and response to the customer — while the customer remains in your store. Authorize.Net Direct Post can be used with orders created from the Admin as well as from the store.

**Deprecation Notice:** Authorize.Net has deprecated the use of MD5 Hash. When configuring, enter a Signature Key using SHA-512. These instructions include the updated step. Payment processing will not complete until you add the correct Signature Key. For details, see Authorize.Net's [MD5 Hash End of Life & Signature Key Replacement](#) and [What is a Signature Key](#). To install the patch, see the Magento KB article [Update Authorize.Net Direct Post from MD5 to SHA-512](#).

### Customer Workflow

1

**Customer chooses payment method.** During checkout, the customer chooses Authorize.Net Direct Post as the payment method.

2

**Customer submits the order.** The customer enters the credit card information, reviews the order, and taps the Place Order button.

3

**Authorize.Net completes the transaction.** Authorize.Net validates the card information, and processes the transaction.

- If successful, the customer is redirected to the order confirmation page.
- If the transaction fails, an error message appears, and the customer can try a different card, or choose a different payment method.

### Step 1: Enable Direct Post

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Payment Methods**.
3. Expand ☑ the **Authorize.Net Direct Post** section. Then, do the following:
  - a. Set **Enabled** to “Yes.”
  - b. Set **Payment Action** to one of the following:

Authorize Only	Funds on the customer's card are authorized by Authorize.Net, and an order is created in your store's Admin. You can later create an invoice and capture the funds.
Authorize and Capture	Funds on the customer's card are authorized and captured by Authorize.Net, and an order and invoice are created in your store's Admin.

- c. Enter a **Title** to identify the Authorize.Net Direct Post payment method during checkout.

*Enable Authorize.Net Direct Post*

## Step 2: Enter Your Credentials

- Enter the following credentials from your Authorize.Net account:
  - API Login ID
  - Transaction Key
- In the **Signature Key** field, enter a Signature Key from your Authorize.Net merchant Account. To generate a new SHA-512 Signature Key, see Authorize.Net's [What is a Signature Key](#).

This field was previously Merchant MD5. That field and value were deprecated. For details, see Authorize.Net's [MD5 Hash End of Life & Signature Key Replacement](#).

- Set **New Order Status** to one of the following:
  - Processed Ogone Payment
  - Processing
- To operate temporarily in a test environment, set **Test Mode** to “Yes.” When you are ready to process live transactions, set **Test Mode** to “No.”

When testing the configuration in a sandbox, use only the [credit card numbers](#) that are recommended by Authorize.Net.

- Enter the **Gateway URL** that establishes the connect to the Authorize.Net server. The default value is:

```
https://secure.authorize.net/gateway/transact.dll
```

If you have received a temporary URL for test transactions, don't forget to restore the original URL when you are ready to process live transactions.

API Login ID	<input type="text"/>	[WEBSITE]
Transaction Key	<input type="text"/>	[WEBSITE]
Signature Key	<input type="text"/>	[WEBSITE]
New Order Status	Processing	[WEBSITE]
Test Mode	Yes	[WEBSITE]
Gateway URL	https://secure.authorize.net/gateway/transact.dll	[WEBSITE]
Transaction Details URL	https://api2.authorize.net/xml/v1/request.api	[WEBSITE]

*Enter Your Credentials*

### Step 3: Complete Payment and Notification Information

1. Verify that **Accepted Currency** is set to "US Dollar."
2. To save messages transmitted between your store and the Authorize.Net Direct Post system, set **Debug** to "Yes."
3. To set the notification options, do the following:
  - a. If you want Authorize.Net to send an order confirmation notification to the customer, set **Email Customer** to "Yes."
  - b. In the **Merchant's Email** field, enter the email address where you want to receive notification of orders placed with Direct Post. Leave blank if you do not want to receive notification.
4. To complete the payment options, do the following:
  - a. In the **Credit Card Types** list, select each credit card that is accepted in your store.
  - b. To require customers to enter a card verification value (CVV), set **Credit Card Verification** to "Yes."

Accepted Currency: US Dollar [WEBSITE]

Debug: No [WEBSITE]

Email Customer: No [WEBSITE]

Merchant's Email: [WEBSITE]

Credit Card Types: American Express, Visa, MasterCard, Discover, Other [WEBSITE]

Credit Card Verification: No [WEBSITE]

*Complete the Payment Information*

- c. Set **Payment from Applicable Countries** to one of the following:

All Allowed Countries

Customers from all **countries** specified in your store configuration can use this payment method.

Specific Countries

After choosing this option, the Payment from Specific Countries list appears. Select each country in the list where customers can make purchases from your store.

Payment from Applicable Countries: All Allowed Countries [WEBSITE]

Payment from Specific Countries: Afghanistan, Aaland Islands, Albania, Algeria, American Samoa, Andorra, Angola, Anguilla, Antarctica, Antigua and Barbuda [WEBSITE]

*Specify the Applicable Countries*

- d. Enter the **Minimum Order Total** and **Maximum Order Total** for Direct Post transactions. To qualify, the order total must exactly match the minimum or maximum threshold, or fall somewhere in between.
- e. Enter a **Sort Order** number to determine the position of Direct Post in the list of payment methods during checkout. (0 = first, 1 = second, 2 = third, and so on.)

Minimum Order Total: [WEBSITE]

Maximum Order Total: [WEBSITE]

Sort Order: [WEBSITE]

*Specify the Applicable Countries*

5. When complete, tap **Save Config.**

## CyberSource

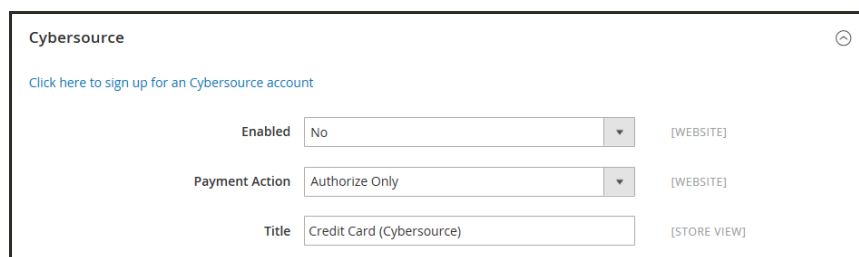
**CyberSource** was one of the pioneers in the early online payment industry, and later acquired Authorize.Net. Today, Cybersoure is a wholly-owned subsidiary of Visa Inc. Over 400,000 businesses worldwide use CyberSource to process online payments, streamline fraud management, and to simplify payment security. The company is based in Foster City, California, and has offices throughout Asia, Europe, Latin America, the Mlddle East, Africa, and the United States.

### Step 1: Get Your CyberSource Credentials

Sign up for a CyberSource **merchant account**, and get your credentials.

### Step 2: Enable CyberSource

1. Set **Enabled** to “Yes.”
2. Accept the **Default Payment** action of “Authorized Only,” which approves the purchase and puts a hold on the funds. The amount is not withdrawn from the customer’s bank account until the sale is “captured” by the merchant.
3. Enter a **Title** to identify CyberSource during checkout.



The screenshot shows the 'Cybersource' configuration page in the Magento Admin. At the top, there is a link: 'Click here to sign up for an Cybersource account'. Below this, there are three configuration fields:

Field	Value	Link
Enabled	No	[WEBSITE]
Payment Action	Authorize Only	[WEBSITE]
Title	Credit Card (Cybersource)	[STORE VIEW]

*Enable CyberSource*

### Step 3: Enter Your CyberSource Credentials

Enter the following credentials from your CyberSource account:

- Profile ID
- Merchant ID
- Transaction Key
- Access Key
- Secret Key

Profile ID	<input type="text"/>	[WEBSITE]
Merchant ID	<input type="text"/>	[WEBSITE]
Transaction Key	<input type="text"/>	[WEBSITE]
Access Key	<input type="text"/>	[WEBSITE]
Secret Key	<input type="text"/>	[WEBSITE]

*Your CyberSource Credentials***Step 4: Complete the Payment Information**

1. Set **New Order Status** to one of the following **order status** settings:
  - Processing
  - Suspected Fraud
2. To run CyberSource in a test environment before going live, set **Test Mode** to “Yes.”  
When you are ready to go live with CyberSource, set Test Mode to “No.”
3. If you want the system to save a log file of interactions between your store and CyberSource, set **Debug** to “Yes.”
4. Set **Credit Card Types** to each card that you accept as payment. To choose multiple credit cards, hold down the Ctrl key and click each option.

New Order Status	Processing	[WEBSITE]
Test Mode	Yes	[WEBSITE]
Accepted Currency	US Dollar	[WEBSITE]
Debug	No	[WEBSITE]
Credit Card Types	<div>           American Express            Visa            MasterCard            Discover            JCB            Diners            Maestro International            Maestro Domestic         </div>	[WEBSITE]

*Credit Card Types*

## Step 5: Complete the Remaining Information

1. Set **Payment from Applicable Countries** to one of the following:

- All Allowed Countries
- Specific Countries

For **Payment from Specific Countries**, hold down the Ctrl key and select each country from which you accept payment.

2. To set limits on the total amount that is allowed for any order, enter the **Minimum Order Total** and **Maximum Order Total**.
3. In the **Sort Order** field, enter a number to determine the sequence in which CyberSource appears when listed with other payment methods during checkout.
4. When complete, tap **Save Config.**

The screenshot shows a configuration form for the CyberSource payment method. It includes the following fields:

- Payment from Applicable Countries:** A dropdown menu currently set to "All Allowed Countries".
- Payment from Specific Countries:** A list of countries including Afghanistan, Åland Islands, Albania, Algeria, American Samoa, Andorra, Angola, Anguilla, Antarctica, and Antigua and Barbuda. The list is scrollable.
- Minimum Order Total:** A text input field.
- Maximum Order Total:** A text input field.
- Sort Order:** A text input field.

Each field has a "[WEBSITE]" label to its right.

*Remaining Information*




## eWAY

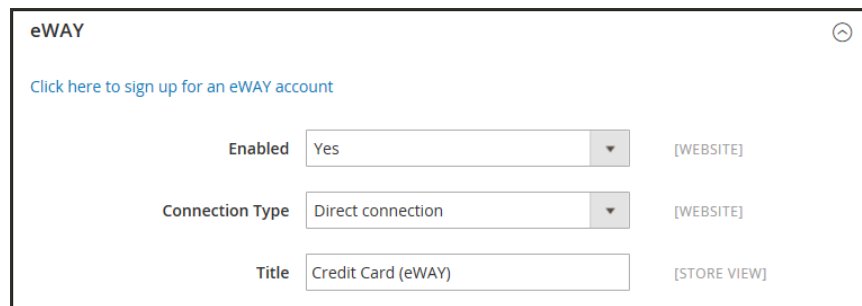
eWAY is based in Australia, and provides secure payment processing services to merchants throughout Australia, New Zealand, the United Kingdom, Singapore, Malaysia, and Hong Kong. Their latest Rapid 3.1 API enables real-time fraud protection.

### Step 1: Get Your eWAY Credentials

Sign up for an eWAY [merchant account](#), and get your credentials.

### Step 2: Enable eWAY

1. Log in to the Admin of your store. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configure**.
2. In the panel on the left under **Sales**, choose **Payment Methods**.
3. Expand  the **eWAY** section. Then, do the following:



*Enable eWAY*

- a. Set **Enabled** to “Yes.”
- b. Set **Connection Type** to one of the following:
 

Direct connection	Completes the transaction without leaving your website.
Responsive shared page	Redirects to a page for your store that is hosted on the eWAY server to complete the transaction.
- c. Enter a **Title** to identify eWAY as a payment option during checkout.

### Step 3: Enter Your eWAY Credentials

1. To run test transactions in a test environment, set **Sandbox Mode** to “Yes.” To learn more, see: [Sandbox/Testing](#) on the eWAY website.

When you are ready to go live with eWAY, set **Sandbox Mode** to “No.”

2. Follow the **instructions** on the eWAY website to set up your Live API key and password. Then, enter the following:
  - Live API Key
  - Live API Password
  - Live Client-side Encryption Key
3. Follow the **instructions** on the eWAY website to set up your sandbox credentials. Then, enter the following:
  - Sandbox API Key
  - Sandbox API Password
  - Sandbox Client-side Encryption Key

Sandbox Mode	Yes	[WEBSITE]
Live API Key		[WEBSITE]
Live API Password		[WEBSITE]
	<a href="#">How to generate Live Rapid 3.1 API Key and Password</a>	
Live Client-side Encryption Key		[WEBSITE]
Sandbox API Key		[WEBSITE]
Sandbox API Password		[WEBSITE]
	<a href="#">How to generate Sandbox Rapid 3.1 API Key and Password</a>	
Sandbox Client-side Encryption Key		[WEBSITE]

*eWAY Credentials*

## Step 4: Configure Payments

1. Set **Payment Action** to one of the following

Authorize Only	Approves the purchase and puts a hold on the funds. The amount is not withdrawn from the customer's bank account until the sale is "captured" by the merchant.
Authorize and Capture	The amount of the purchase is authorized and immediately withdrawn from the customer's account.

2. To save a record of communications between your store and the eWAY system in a log file, set **Debug** to "Yes."

In accordance with PCI Data Security Standards, credit card information is not recorded in the log file.

3. In the **Credit Card Types** box, hold down the Ctrl key and select each credit card that is accepted as payment in your store.

The screenshot shows a configuration window with three sections. The first section, 'Payment Action', has a dropdown menu set to 'Authorize Only'. The second section, 'Debug', has a dropdown menu set to 'Yes'. The third section, 'Credit Card Types', has a list box containing the following credit card types: American Express, Visa, MasterCard, JCB, and Diners. Each section has a '[WEBSITE]' link to its right.

*Configure Payments*

4. Set **Payment from Applicable Countries** to one of the following:

- All Allowed Countries
- Specific Countries

For **Payment from Specific Countries**, hold down the Ctrl key and select each country from which you accept payment.

The screenshot shows a configuration window with three sections. The first section, 'Payment from Applicable Countries', has a dropdown menu set to 'All Allowed Countries'. The second section, 'Payment from Specific Countries', has a list box containing a scrollable list of countries: Afghanistan, Åland Islands, Albania, Algeria, American Samoa, Andorra, Angola, Anguilla, Antarctica, and Antigua and Barbuda. The third section, 'Sort Order', has a text input field. Each section has a '[WEBSITE]' link to its right.

*Configure Countries*

5. In the **Sort Order** field, enter a number to determine the order in which eWAY appears when listed with other payment methods during checkout.
6. When complete, tap **Save Config.**

# Worldpay

London-based **Worldpay** has twenty-five offices in eleven countries around the world. The company is a global leader in card payments, multi-currency processing, and provides local in-store and mobile payment acceptance solutions for companies large and small.

## Step 1: Get Your Worldpay Credentials

Sign up for a Worldpay online **merchant account**.

## Step 2: Enable Worldpay

- 1. Set **Enabled** to “Yes.”
- 2. Enter a **Title** to identify Worldpay as a payment option during checkout.

Worldpay

[Click here to sign up for an Worldpay account](#)

Enabled

No

[WEBSITE]

Title

Payment method (Worldpay)

[STORE VIEW]

Enable Worldpay

## Step 3: Enter Your Worldpay Credentials

Enter the following credentials from your Worldpay account:

- Installation ID
- Payment Response Password
- Remote Admin Installation ID
- Remote Admin Authorization Password
- MDS Secret for Transactions

Installation ID	<input type="text"/>	[WEBSITE]
Payment Response Password	<input type="text"/>	[WEBSITE]
Remote Admin Installation ID	<input type="text"/>	[WEBSITE]
Remote Admin Authorisation Password	<input type="text"/>	[WEBSITE]
MDS Secret for Transactions	<input type="text"/>	[WEBSITE]

Worldpay Credentials

### Step 4: Configure Contact Information

1. If you want customers to be able to edit their contact information, set **Allow to Edit Contact Information** to “Yes.”
2. If you don’t want to show customers their contact information, set **Hide Contact Information** to “Yes.”
3. Accept the default **Signature Fields** value.

Allow To Edit Contact Information	Yes	[WEBSITE]
Hide Contact Information	No	[WEBSITE]
Signature Fields	instid:cardid:amount:currency	

*Contact Information*

### Step 5: Configure Test Mode

1. If you want the system to save a log file of interactions between your store and Worldpay, set **Debug** to “Yes.”
  2. To run Worldpay in a test environment before going live, set **Test Mode** to “Yes.”
- When you are ready to go live with Worldpay, set **Test Mode** to “No.”

Debug	Yes	[WEBSITE]
Test Mode	Yes	[WEBSITE]

*Test Mode*

### Step 6: Configure Payments

1. To determine the payment action used for test transactions, set **Payment Action for Test** to one of the following:
  - Authorised
  - Error
  - Captured
2. To determine the payment action used for live transactions, set **Payment Action** to one of the following:

Authorize Only	Approves the purchase and puts a hold on the funds. The amount is not withdrawn from the customer's bank account until the sale is "captured" by the merchant.
Authorize and Capture	The amount of the purchase is authorized and immediately withdrawn from the customer's account.

**3.** Set **Payment from Applicable Countries** to one of the following:

- All Allowed Countries
- Specific Countries

For **Payment from Specific Countries**, hold down the Ctrl key and select each country from which you accept payment.

Payment Action for Test	Authorised	[WEBSITE]
Payment Action	Authorize	[WEBSITE]
Payment From Applicable Countries	All Allowed Countries	[WEBSITE]
Payment From Specific Countries	Afghanistan Åland Islands Albania Algeria American Samoa Andorra Angola Anguilla Antarctica Antigua and Barbuda	[WEBSITE]

*Configure Payments*

## Step 7: Configure Fraud Prevention Settings

Set both **Order Status to Suspected Fraud for CVV** and **Order Status to Suspected Fraud for Postcode AVS** to one of the following:

- None
- Not Supported
- Not Checked
- Not Matched
- Partially Matched

Set Order Status to Suspected Fraud for CVV	<div>None</div> <div>Not supported</div> <div>Not checked</div> <div>Not matched</div> <div>Partially matched</div>	[WEBSITE]
Set Order Status to Suspected Fraud for Postcode AVS	<div>None</div> <div>Not supported</div> <div>Not checked</div> <div>Not matched</div> <div>Partially matched</div>	[WEBSITE]

*Fraud Settings*

### Step 8: Sort Order and Save

1. In the **Sort Order** field, enter a number to determine the sequence in which Worldpay appears when listed with other payment methods during checkout.

Sort Order	<input type="text" value="99"/>	[WEBSITE]
------------	---------------------------------	-----------

*Sort Order*

2. When complete, tap **Save Config.**





## CHAPTER 68:

# Basic Payment Methods

The payment methods covered in this section are built in to Magento, and do not require the services of a third-party payment processing company.



### Offline Payments

---

Magento supports a number of offline payment methods, including payment by **check or money order**, and **cash on delivery** (COD),



### Online Payments

---

**Bank transfer** is a basic payment method that is included with all Magento stores.

## Check / Money Order

Magento Commerce allows you to accept payments by check or money order. The Check / Money Order payment method is enabled for your store by default. You can accept checks and money orders from only specific countries, and fine-tune the configuration with minimum and maximum order total limits.

Check / Money Order

Enabled

Yes

[WEBSITE]

Title

Check / Money order

[STORE VIEW]

New Order Status

Pending

[WEBSITE]

Payment from Applicable Countries

All Allowed Countries

[WEBSITE]

Payment from Specific Countries

Afghanistan  
Åland Islands  
Albania  
Algeria  
American Samoa  
Andorra  
Angola  
Anguilla  
Antarctica  
Antigua and Barbuda

[WEBSITE]

Make Check Payable to

[STORE VIEW]

Send Check to

[STORE VIEW]

Minimum Order Total

[WEBSITE]

Maximum Order Total

[WEBSITE]

Sort Order

[WEBSITE]

*Check / Money Order*

### To configure payment by check or money order:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Payment Methods**.
3. Expand ☺ the **Check / Money Order** section. Then, do the following:
  - a. To accept payment by check or money order, set **Enabled** to “Yes.”
  - b. Enter a **Title** to identify the Check / Money Order payment method during checkout.
  - c. Set **New Order Status** to “Pending” until receipt of payment is confirmed.
  - d. Set **Payment from Applicable Countries** to one of the following:
 

All Allowed Countries	Customers from all <b>countries</b> specified in your store configuration can use this payment method.
Specific Countries	After choosing this option, the Payment from Specific Countries list appears. Select each country in the list where customers can make purchases from your store.
  - e. In the **Make Check Payable To** field, enter the name of the party to whom the check must be payable.
  - f. In the **Send Check To** field, enter the street address or PO Box where the checks are mailed.
  - g. Set **Minimum Order Total** and **Maximum Order Total** to the order amounts required to qualify for this payment method.
 

An order qualifies if the total falls between, or exactly matches, the minimum or maximum total values.
  - h. Enter a **Sort Order** number to determine the position of Check / Money Order in the list of payment methods that is shown during checkout. (0 = first, 1 = second, 2 = third, and so on.)
4. When complete, tap **Save Config**.

# Cash On Delivery

Magento Commerce allows you to accept COD payments for purchases. You can accept COD payment from only specific countries, and fine-tune the configuration with minimum and maximum order total limits.

The shipping carrier receives payment from the customer at the time of delivery, which is then transferred to you. You can make an adjustment for any fee charged by the carrier service in your shipping and handling charges.

Cash On Delivery Payment

Enabled

[website]

No

☒ Use system value

Title

[store view]

Cash On Delivery

☒ Use system value

New Order Status

[website]

Pending

☒ Use system value

Payment from Applicable Countries

[website]

All Allowed Countries

☒ Use system value

Payment from Specific Countries

[website]

Afghanistan

Aland Islands

Albania

Algeria

American Samoa

Andorra

Angola

Anguilla

Antarctica

Antigua and Barbuda

Instructions

[store view]

Minimum Order Total

[website]

Maximum Order Total

[website]

Sort Order

[website]

Cash On Delivery Payment

### To set up cash on delivery payments:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, select **Payment Methods**.
3. Expand ☯ the **Cash On Delivery Payment** section. Then, do the following:
  - a. To activate Cash On Delivery Payment, set **Enabled** to “Yes.”
  - b. Enter a **Title** to identify the COD payment method during checkout.
  - c. Set **New Order Status** to “Pending” until receipt of payment is confirmed.
  - d. Set **Payment from Applicable Countries** to one of the following:

All Allowed Countries	Customers from all <b>countries</b> specified in your store configuration can use this payment method.
Specific Countries	After choosing this option, the Payment from Specific Countries list appears. Select each country in the list where customers can make purchases from your store.
  - e. Enter the **Instructions** for accepting delivery of a COD order.
  - f. Set **Minimum Order Total** and **Maximum Order Total** to the order amounts that are required to qualify for COD payment.

An order qualifies if the total is between, or matches, the minimum or maximum order total.
  - g. Enter a **Sort Order** number to determine the sequence in which Cash On Delivery is listed with other payment methods during checkout. (0 = first, 1 = second, 2 = third, and so on.)
4. When complete, tap **Save Config**.

## Bank Transfer

Magento Commerce allows you to accept payment that is transferred from a customer's bank account and deposited into your merchant bank account.

Bank Transfer Payment

Enabled

No

[WEBSITE]

Title

Bank Transfer Payment

[STORE VIEW]

New Order Status

Pending

[WEBSITE]

Payment from Applicable Countries

All Allowed Countries

[WEBSITE]

Payment from Specific Countries

Afghanistan  
Åland Islands  
Albania  
Algeria  
American Samoa  
Andorra  
Angola  
Anguilla  
Antarctica  
Antigua and Barbuda

[WEBSITE]

Instructions

[STORE VIEW]

Minimum Order Total

[WEBSITE]

Maximum Order Total


[WEBSITE]

Sort Order

[WEBSITE]

*Bank Transfer Payment*

### To configure bank transfer payments:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Payment Methods**.
3. Expand  the **Bank Transfer Payment** section. Then, do the following:
  - a. To activate bank transfers, set **Enabled** to “Yes.”
  - b. Enter a **Title** to identify the Bank Transfer Payment method during checkout.
  - c. Set **New Order Status** to “Pending” until payment is authorized.
  - d. Set **Payment from Applicable Countries** to one of the following:
 

All Allowed Countries	Customers from all <b>countries</b> specified in your store configuration can use this payment method.
Specific Countries	After choosing this option, the Payment from Specific Countries list appears. Select each country in the list where customers can make purchases from your store.
  - e. Enter the **Instructions** your customers must follow to set up a bank transfer. Depending on the country where your bank is located and the requirements of the bank, you might need to include the following information:
    - Bank account name
    - Bank account number
    - Bank routing code
    - Bank name
    - Bank address
  - f. Set **Minimum Order Total** and **Maximum Order Total** to the amounts required to qualify to use this payment method.
 

An order qualifies if the total falls between, or exactly matches, the minimum or maximum total values.
4. Enter a **Sort Order** number to determine the position of Bank Transfer in the list of payment methods during checkout. (0 = first, 1 = second, 2 = third, and so on.)
5. When complete, tap **Save Config**.

# Purchase Order

A purchase order (PO) allows commercial customers to pay for authorized purchases by referencing the PO number. The purchase order is authorized and issued in advance by the company that is making the purchase. During checkout, the customer chooses Purchase Order as the method of payment. Upon receipt of your invoice, the company processes the payment in their accounts payable system, and pays for the purchase.

Before accepting payment by purchase order, always establish the credit worthiness of the commercial customer.

Purchase Order

Enabled

No

[WEBSITE]

Title

Purchase Order

[STORE VIEW]

New Order Status

Pending

[WEBSITE]

Payment from Applicable Countries

All Allowed Countries

[WEBSITE]

Payment from Specific Countries

Afghanistan

Åland Islands

Albania

Algeria

American Samoa

Andorra

Angola

Anguilla

Antarctica

Antigua and Barbuda

[WEBSITE]

Minimum Order Total

[WEBSITE]

Maximum Order Total

[WEBSITE]


Sort Order

[WEBSITE]

Purchase Order



### To configure payment by purchase order:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Payment Methods**.
3. Expand  the **Purchase Order** section. Then, do the following:
  - a. To activate this payment method, set **Enabled** to “Yes.”
  - b. Enter a **Title** to identify this payment method during checkout.
  - c. Set **New Order Status** to “Pending” until payment is authorized.
  - d. Set **Payment from Applicable Countries** to one of the following:

All Allowed Countries	Customers from all <b>countries</b> specified in your store configuration can use this payment method.
Specific Countries	After choosing this option, the Payment from Specific Countries list appears. Select each country in the list where customers can make purchases from your store.
  - e. Set **Minimum Order Total** and **Maximum Order Total** to the amounts required to qualify for this payment method.

An order qualifies if the total falls between, or exactly matches, the minimum or maximum total values.
  - f. Enter a **Sort Order** number to determine the position of Purchase Order in the list of payment methods during checkout. (0 = first, 1 = second, 2 = third, and so on.)
4. When complete, tap **Save Config**.

# Zero Subtotal Checkout

Zero Subtotal Checkout can be used for orders with a subtotal of zero that are taxed after a discount is applied. For example, Zero Subtotal Checkout might be used in the following situations:

- A discount covers the entire price of the purchase, with no additional charge for shipping.
- The customer adds a **downloadable** or **virtual** product to the shopping cart, and the price equals zero.
- The price of a **simple** product is zero, and the **Free Shipping** method is available.
- A **coupon code** covers the full price of products and shipping.

To save time, zero subtotal orders can be set to invoice automatically.

Zero Subtotal Checkout

Title

No Payment Information Required

[STORE VIEW]

Enabled

Yes

[WEBSITE]

New Order Status

Pending

[WEBSITE]

Payment from Applicable Countries

All Allowed Countries

[WEBSITE]

Payment from Specific Countries

Afghanistan  
Åland Islands  
Albania  
Algeria  
American Samoa  
Andorra  
Angola  
Anguilla  
Antarctica  
Antigua and Barbuda

[WEBSITE]

Sort Order

1

[WEBSITE]

Zero Subtotal Checkout

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, select **Payment Methods**.
3. Click to expand the **Zero Subtotal Checkout** section. Then, do the following:
  - a. Enter a **Title** to identify the Zero Subtotal method during checkout.
  - b. Set **Enabled** to “Yes” to activate Zero Subtotal Checkout.
  - c. If orders typically wait for authorization, set **New Order Status** to “Pending” until payment is authorized.
 

Pending	The order is waiting for authorization.
Processing	Payment has been authorized, and the transaction is being processed.
  - d. Set **Automatically Invoice All Items** to “Yes” if you want to automatically invoice all items that have a zero balance.
  - e. Set **Payment from Applicable Countries** to one of the following:
 

All Allowed Countries	Customers from all <b>countries</b> specified in your store configuration can use this payment method.
Specific Countries	After choosing this option, the Payment from Specific Countries list appears. Select each country in the list where customers can make purchases from your store.
  - f. Enter a **Sort Order** number to determine the position of Zero Subtotal Checkout in the list of payment methods during checkout. (0 = first, 1 = second, 2 = third, and so on.)
4. When complete, tap **Save Config**.

# Shipping

## Contents

Studies show that stores offering customers a choice of several shipping methods have higher conversion rates than those that use a single method for all shipments. In this section of the guide, you will learn how to set up a variety of shipping methods and carriers, and print shipping labels.

### Shipping Settings

#### Shipping Policy

### Basic Shipping Methods

#### Free Shipping

#### Flat Rate

#### Table Rate

#### Dimensional Weight

### Carriers

### Shipping Labels

#### Shipping Label Workflow

#### Configuring Shipping Labels

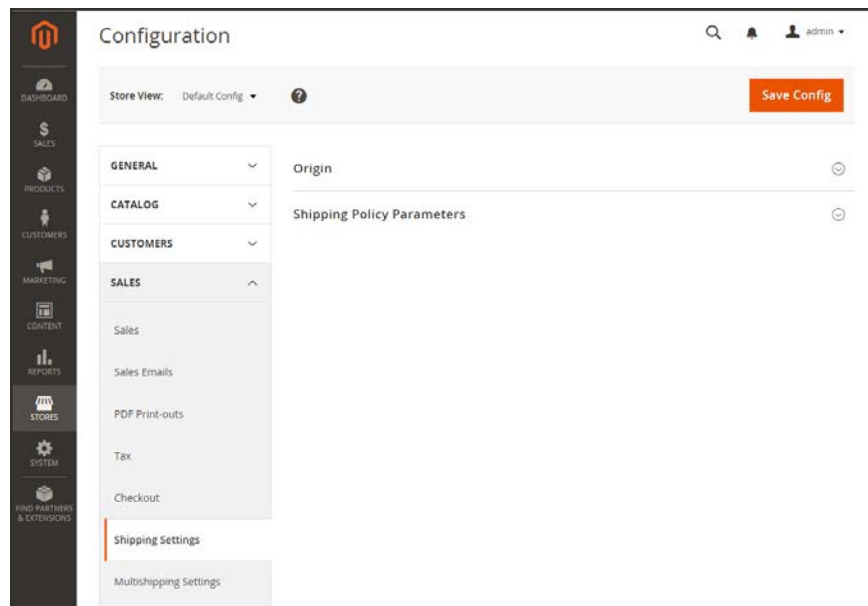
#### Creating Shipping Labels

## CHAPTER 69:

# Shipping Settings

The shipping configuration establishes the point of origin for all shipments, your shipping policy, and the handling of shipments to multiple addresses.

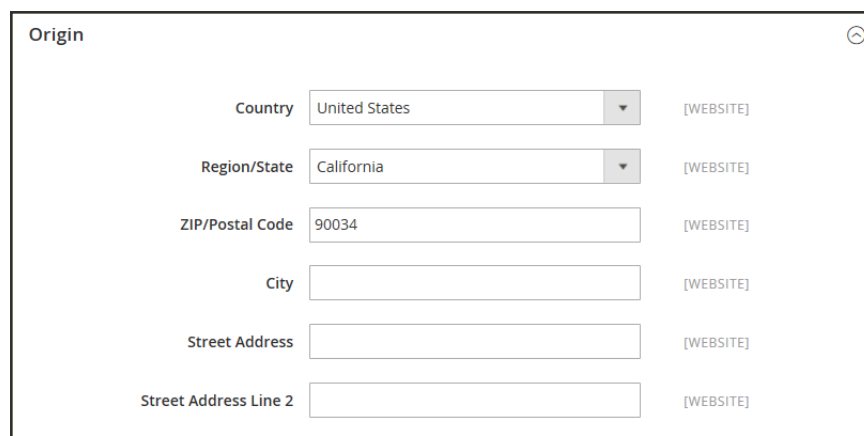
- [Point of Origin](#)
- [Shipping to Multiple Addresses](#)
- [Shipping Policy](#)



*Shipping Settings*

## Point of Origin

The point of origin is used to calculate the charge for shipments made from your store or warehouse, and also determines the tax rate for products sold. When calculating **EU taxes**, make sure that the **Default Tax Destination Calculation** for each store view corresponds to the Shipping Settings point of origin.



*Origin*

### To establish the point of origin:

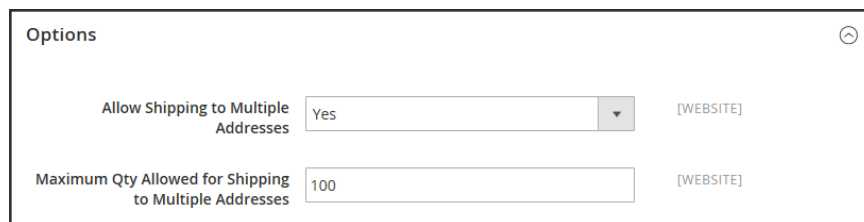
1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Shipping Settings**.
3. Expand ☑ the **Origin** section, and complete the following:
  - Country
  - Region / State
  - ZIP / Postal Code
  - City
  - Street Address (and line 2, if needed)
4. When complete, tap **Save Config**.

## Multiple Addresses

The Multiaddress Shipping options enable customers to ship an order to multiple addresses during checkout, and determine the maximum number of addresses to which an order can be shipped.

### To configure multiple address shipping:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Multishipping Settings**.
3. Expand ☺ the **Options** section. Then, do the following:
  - a. Set **Allow Shipping to Multiple Addresses** to “Yes.”
  - b. Enter the **Maximum Qty Allowed for Shipping to Multiple Addresses**.
4. When complete, tap **Save Config**.



The screenshot shows a configuration panel titled "Options" with a collapse icon in the top right corner. It contains two settings:

Allow Shipping to Multiple Addresses	Yes	[WEBSITE]
Maximum Qty Allowed for Shipping to Multiple Addresses	100	[WEBSITE]

*Multiaddress Shipping Options*




## Shipping Policy

To display your shipping policy during checkout, complete the Shipping Policy Parameters in the configuration.

The screenshot shows a configuration panel titled "Shipping Policy Parameters" with a close button in the top right corner. Inside the panel, there are two main sections. The first section is labeled "Apply custom Shipping Policy" and contains a dropdown menu currently set to "Yes", with a "[WEBSITE]" label to its right. The second section is labeled "Shipping Policy" and contains a large, empty text box, with a "[STORE VIEW]" label to its right.

*Shipping Policy Parameters*

### To configure your shipping policy:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Shipping Settings**.
3. Expand  the **Shipping Policy Parameters** section, and do the following:
  - a. Set Apply **Custom Shipping Policy** to “Yes.”
  - a. Either paste or enter your **Shipping Policy** into the text box.
4. When complete, tap **Save Config**.



## CHAPTER 70:

# Basic Shipping Methods

Magento Commerce supports a wide range of shipping methods and carriers. In this chapter you will learn how to set up that shipping methods that do not require an account with a third-party provider.

- Free Shipping
- Flat Rate
- Table Rates
- Dimensional Weight

## Free Shipping

Free shipping is one of the most effective promotions you can offer. It can be based on a minimum purchase, or set up as a **cart price rule** that is applied when a set of conditions is met. If both apply to the same order, the configuration setting takes precedence over the cart rule.

Check your shipping carrier configuration for any additional settings that may be required for free shipping.

**Free Shipping**
⌵

Enabled

[WEBSITE]

Title

[STORE VIEW]

Method Name

[STORE VIEW]

Minimum Order Amount

[WEBSITE]

Displayed Error Message

[STORE VIEW]

Ship to Applicable Countries

[WEBSITE]

Ship to Specific Countries

Afghanistan  
Åland Islands  
Albania  
Algeria  
American Samoa  
Andorra  
Angola  
Anguilla  
Antarctica  
Antigua and Barbuda

[WEBSITE]

Sort Order

[WEBSITE]

### *Free Shipping*

#### Step 1: Configure Free Shipping

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Shipping Methods**.
3. Expand ⌵ the **Free Shipping** section. Then, do the following:
  - a. Set **Enabled** to “Yes.”
  - b. Enter a **Title** to identify the Free Shipping method during checkout.
  - c. Enter a **Method Name** to describe this shipping method.

- d. Enter the **Minimum Order Amount** to qualify for free shipping.

To use Free Shipping with **Table Rates**, make the Minimum Order Amount so high that it is never met. This prevents Free Shipping from going into effect, unless it is triggered by a price rule.

- e. In the **Displayed Error Message** box, type the message to appear if free shipping becomes unavailable.

- f. Set **Ship to Applicable Countries** to one of the following:

All Allowed Countries	Customers from all <b>countries</b> specified in your store configuration can use free shipping.
Specific Countries	After choosing this option, the Ship to Specific Countries list appears. Select each country in the list where free shipping can be used.

- g. Set **Show Method if Not Applicable** to one of the following:

Yes	Always shows the Free Shipping method, even when not applicable.
No	Shows the Free Shipping method only when applicable.

- h. Enter a **Sort Order** number to determine the position of free shipping in the list of shipping methods during checkout. (0 = first, 1 = second, 2 = third, and so on.)

4. When complete, tap **Save Config**.

## Step 2: Enable Free Shipping in the Carrier Configuration

Make sure to complete any configuration that is required for each carrier that you plan to use for free shipping. For example, if your UPS configuration is otherwise complete, make the following settings to enable and configure free shipping:

1. From the Shipping Methods configuration, click to expand the **UPS** section.
2. Expand ☺ the **UPS** section. Then, set **Free Method** to “Ground.”
3. To require a minimum order for free shipping, set **Free Shipping with Minimum Order Amount** to “Enable.”
4. Enter the required amount in the **Minimum Order Amount for Free Shipping** field.
5. When complete, tap **Save Config**.

## Flat Rate

Flat rate is a fixed, predefined charge that can be applied per item, or per shipment. Flat rate is a simple shipping solution, especially when used with the flat-rate packaging that is available from some carriers.

Flat Rate

Enabled

Yes

[WEBSITE]

Title

Flat Rate

[STORE VIEW]

Method Name

Fixed

[STORE VIEW]

Type

Per Item

[WEBSITE]

Price

5

[WEBSITE]

Calculate Handling Fee

Fixed

[WEBSITE]

Handling Fee

[WEBSITE]

Displayed Error Message

This shipping method is not available. To use this shipping method, please contact us.

[STORE VIEW]

Ship to Applicable Countries

All Allowed Countries

[WEBSITE]

Ship to Specific Countries

Afghanistan  
Åland Islands  
Albania  
Algeria  
American Samoa  
Andorra  
Angola  
Anguilla  
Antarctica  
Antigua and Barbuda


[WEBSITE]

Sort Order

[WEBSITE]

*Flat Rate*

### To set up flat rate shipping:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Shipping Methods**.
3. Expand  the **Flat Rate** section. Then, do the following:
  - a. Set **Enabled** to “Yes.”

Flat Rate appears as an option in the Estimate Shipping and Tax section of the shopping cart, and also in the Shipping section during checkout.

- b.** Enter a descriptive **Title** for the Flat Rate method.
- c.** Enter a **Method Name** to appear next to the calculated rate in the shopping cart. The default method name is “Fixed.” If you charge a handling fee, you can change the Method Name to “Plus Handling,” or something else that is suitable.
- d.** To describe how flat rate shipping can be used, set **Type** to one of the following:

None	Disables the payment type. The Flat Rate option is listed in the cart, but with a rate of zero—which is the same as free shipping.
Per Order	Charges a single flat rate for the entire order.
Per Item	Charges a single flat rate for each item. The rate is multiplied by the number of items in the cart, regardless of whether there are multiple quantities of the same, or of different items.

- e.** Enter the **Price** that you want to charge for flat rate shipping.
- f.** If charging an additional handling fee, set **Calculate Handling Fee** to one of the following:
  - Fixed
  - Percent

Then, enter the **Handling Fee** rate according to the method used to calculate the fee. For example, if the fee is calculating based on a percentage, enter 0.06 for 6 percent. If using a fixed amount calculation, enter the fee as a decimal.

- g.** In the **Displayed Error Message** box, type the message that appears if Flat Rate Shipping becomes unavailable.
- h.** Set **Ship to Applicable Countries** to one of the following:

All Allowed Countries	Customers from all <b>countries</b> specified in your store configuration can use flat rate shipping.
Specific Countries	After choosing this option, the Ship to Specific Countries list appears. Select each country in the list where flat rate shipping can be used.

- i.** Enter a **Sort Order** number to determine the position of the Flat Rate in the list of shipping methods during checkout. (0 = first, 1 = second, 2 = third, and so on.)
- 4.** When complete, tap **Save Config**.

## Table Rates

The table rate shipping method references a table of data to calculate shipping rates based on a combination of conditions, including:

- Weight v. Destination
- Price v. Destination
- # of Items v. Destination

For example, if your warehouse is in Los Angeles, it costs less to ship to San Diego than to Vermont. You can use table rate shipping to pass the savings on to your customers.

The data that is used to calculate tables rates is prepared in a spreadsheet and imported into your store. When the customer requests a quote, the results appear in the shipping estimate section of the shopping cart.

Only one set of table rate data can be active at a time.

ESTIMATE

UNITED PARCEL SERVICE

- ☐ Ground \$11.07
- ☐ 3 Day Select \$45.49
- ☐ Next Day Air \$32.71

BEST WAY

- ☒ Table Rate \$5.00

UPDATE TOTAL

SUBTOTAL \$750.00

SHIPPING & HANDLING BEST WAY - TABLE RATE \$5.00

TAX \$67.50

GRAND TOTAL \$822.50

Check out with **PayPal**  
The safer, easier way to pay


PROCEED TO CHECKOUT

Checkout with Multiple Addresses

*Table Rate in Shopping Cart*

**Process Overview:**Step 1: **Complete the Default Settings**Step 2: **Prepare the Table Rate Data**Step 3: **Import the Table Rate Data**Step 4: **Verify the Rates****Step 1: Complete the Default Settings**

The first step is to complete the default settings for table rates. You can complete this step without changing the scope of the configuration.

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Shipping Methods**.
3. Expand  the **Table Rates** section. Then, do the following:
  - a. Set **Enabled** to “Yes.”
 

If necessary, clear the **Use system value** checkbox to edit for any field to be edited.
  - b. Enter the **Title** that you want to appear for table rates section during checkout. (The default title is “Best Way.”)
  - c. Enter the **Method Name** that you want to appear as a label next to the calculated rate in the shopping cart.
  - d. Set **Condition** to one of the following calculation methods:
    - Weight v. Destination
    - Price v. Destination
    - # of Items v. Destination
  - e. For orders that include virtual products, set **Include Virtual Products in Price Calculation** to “Yes” if you want to be able to include the virtual product(s) in the calculation.

Because virtual products—such as services—have no weight, they cannot change the result of a calculation that is based on the Weight v. Destination condition. However, virtual products can change the result of a calculation that is based on either the Price v. Destination or # of Items vs Destination condition.

- f. If charging a handling fee, set **Calculate Handling Fee** to one of the following:
  - Fixed
  - Percent

Then, enter the **Handling Fee** rate according to the method used to calculate the fee.



If the handling fee is based on a percent, enter the whole number without the percent sign.

- g. In the **Displayed Error Message** box, type the message that appears when this method is not available.
  - h. Set **Ship to Applicable Countries** to one of the following:  

All Allowed Countries	Customers from any <b>country</b> specified in your store configuration can use table rate shipping.
Specific Countries	After choosing this option, the “Ship to Specific Countries” list appears. Select each country where customers can use table rate shipping.
  - i. Enter a **Sort Order** number to determine where table rates appear in the list of shipping methods during checkout. (0 = first, 1 = second, 2 = third, and so on.)
4. When complete, tap **Save Config**.

Table Rates

Enabled

Yes

Use system value

Title

Best Way

Use system value

Method Name

Table Rate

Use system value

Condition

Price vs. Destination

Use system value

Include Virtual Products in Price Calculation

Yes

Use system value

Calculate Handling Fee

Fixed

Use system value

Handling Fee

Displayed Error Message

This shipping method is not available. To use this shipping method, please contact us.

Use system value

Ship to Applicable Countries

All Allowed Countries

Use system value

Ship to Specific Countries

Afghanistan  
Åland Islands  
Albania  
Algeria  
American Samoa  
Andorra  
Angola  
Anguilla  
Antarctica  
Antigua and Barbuda

Show Method if Not Applicable

No

Sort Order

Table Rates

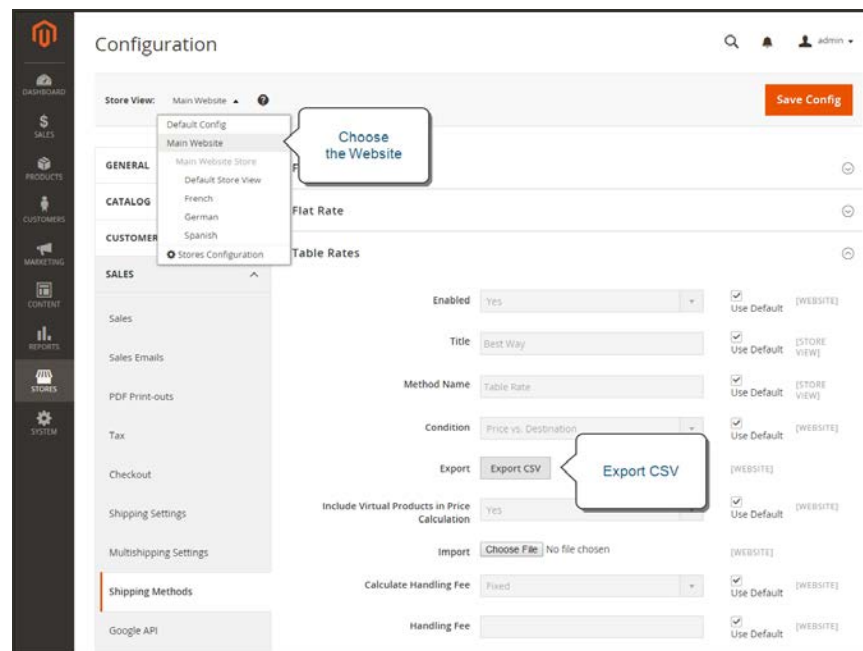
## Step 2: Prepare the Table Rate Data

1. In the upper-left corner, set **Store View** to “Main Website,” or to any other website where the configuration applies. When prompted to confirm, tap **OK**.

The Export and Import options now appear in the Table Rates section, with “Use Default” checkboxes to the right of each option.

To change any of the current settings, you must first clear the “Use Default” checkbox next to the field.

2. To change the **Condition**, clear the **Use Default** checkbox. Then, choose another option.
3. Tap **Export CSV**. Then, save the **tablerates.csv** file to your computer.



*Export CS*

4. Open the file in a spreadsheet. Then, complete the table with appropriate values for the shipping calculation condition.
  - Use an asterisk (\*) as a wildcard to represent all possible values in any category.
  - The Country column must contain a **valid three-character code** for each row.
  - Sort the data by Region/State so the specific locations are at the top of the list, and the wildcard locations at the bottom. This will process the rules with the absolute values first, and the wildcard values later.

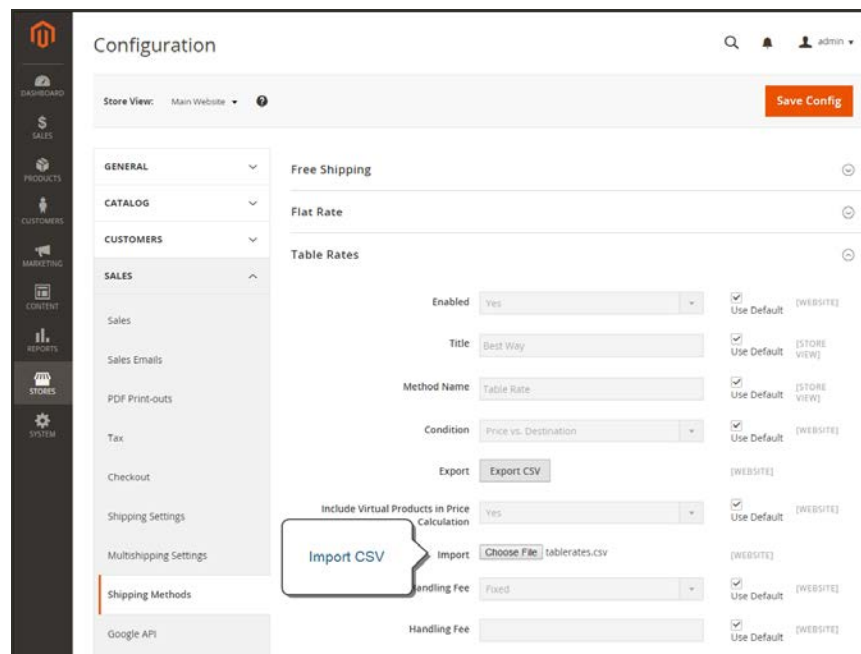
	A	B	C	D	E	F
1	Country	Region/State	Zip/Postal Code	Weight (and above)	Shipping Price	
2	AUS	NT	*	9	39.95	
3	AUS	NT	*	0	19.95	
4	AUS	VIC	*	9	19.95	
5	AUS	VIC	*	0	5.95	
6	AUS	WA	*	9	39.95	
7	AUS	WA	*	0	19.95	
8	AUS	*	*	9	29.95	
9	AUS	*	*	0	9.95	
10						

*Weight vs. Destination (Australia)*

- When complete, save the **tablerates.csv** file.

### Step 3: Import the Table Rate Data

- Return to the **Table Rates** section of your store configuration.
- In the upper-left corner, set **Store View** to the website where this method will be used.
- Next to the **Import** field, tap **Choose File**. Select your completed **tablerates.csv** file, and import the rates.

*Import Table Rates*

- When complete, tap **Save Config**.

### Step 4: Verify the Rates

To make sure that the table rate data is correct, go through the payment process with several different addresses to make sure the shipping and handling rates are calculated correctly.

### Example 1: Price v. Destination

This example uses the Price v. Destination condition to create a set of three different shipping rates based on the amount of the order subtotal for the continental United States, Alaska, and Hawaii. The asterisk (\*) is a wildcard that represents all values.

COUNTRY	REGION / STATE	ZIP / POSTAL CODE	ORDER SUBTOTAL (and above)	SHIPPING PRICE
USA	HI	*	100	10
USA	HI	*	50	15
USA	HI	*	0	20
USA	AK	*	100	10
USA	AK	*	50	15
USA	AK	*	0	20
USA	*	*	100	5
USA	*	*	50	10
USA	*	*	0	15

### Example 2: Weight v. Destination

This example uses the Weight v. Destination condition to create different shipping rates based on the weight of the order.

COUNTRY	REGION / STATE	ZIP / POSTAL CODE	WEIGHT (AND ABOVE)	SHIPPING PRICE
AUS	NT	*	9	39.95
AUS	NT	*	0	19.95
AUS	VIC	*	9	19.95
AUS	VIC	*	0	5.95
AUS	WA	*	9	39.95
AUS	WA	*	0	19.95
AUS	*	*	9	29.95
AUS	*	*	0	9.95

### Example 3: Restrict Free Shipping to the Continental United States

1. Create a `tablerates.csv` file that includes all the state destinations to which you are willing to provide free shipping.
2. Complete the table rate configuration with the following settings:

SETTING	VALUE
Condition	Price v. Destination
Method Name	Free Shipping
Ship to Applicable Countries	Specific Countries
Ship to Specific Countries	Select only United States
Show method if not applicable	No

3. Set **Store View** to the main website. Then, tap **Import** to import the `tablerates.csv` file.

## Dimensional Weight

Dimensional weight, sometimes called volumetric weight, is a common industry practice that bases the transportation price on a combination of weight and package volume. In simple terms, dimensional weight is used to determine the shipping rate based on the amount of space a package occupies in the cargo area of the carrier. Dimensional weight is typically used when a package is relatively light compared to its volume.

All major carriers now apply dimensional weight to some shipments. However, the manner in which dimensional weight pricing is applied varies from one carrier to another.

- [DHL](#)
- [FedEx](#)
- [UPS](#)
- [USPS](#)

We recommend that you become familiar with the method used by each carrier to determine and apply dimensional weight. If your company has a high volume of shipments, even a slight difference in shipping price can translate to thousands of dollars over the course of a year. Magento's native shipping configuration does not include support for dimensional weight.





## CHAPTER 71:

# Carriers

If you have a commercial account with a supported carrier, you can offer your customers the convenience of choosing that carrier during checkout. The rates are automatically downloaded, so you do not need to look up the information.

Before you can offer your customers a selection of shipping carriers, you must first complete the **shipping settings** to establish the point of origin for your store. Then, complete the configuration for each carrier service that you want to offer. The configuration options vary for each carrier. However, all require that you first open a shipping account with the carrier, and enter your account number or user ID, and the gateway URL to their system into the configuration of your store. See **Magento Connect** for additional shipping services for your Magento Commerce installation.



See the [online user guide](#) for step-by-step configuration instructions for the following carriers:



## UPS

---

United Parcel Service offers domestic and international shipping services by land and air to more than 220 countries.



## USPS

---

The United States Postal Service is the independent postal service of United States government. USPS offers domestic and international shipping services by land and air.



## FedEx

---

Offers domestic and international shipping services by land and air to more than 220 countries.



## DHL

---

Offers integrated international services and tailored, customer-focused solutions for managing and transporting letters, goods and information.

## CHAPTER 72:

# Shipping Labels

Magento Commerce includes a high level of integration with major shipping carriers, which gives you access to carrier shipping systems to track orders, create shipping labels, and more. Shipping labels can be created for regular shipments and products with return merchandise authorization. In addition to the information provided by the shipping carrier, the label also includes the Magento order number, number of the package, and the total quantity of packages for the Magento shipment.

P	
USPS PRIORITY MAIL®	
<FromName> <FromPhone> <FromAddress1> <FromAddress2> <FromCity> <FromState> <FromZip> <FromZip4>	
<RC>	
<ToName> <ToPhone> <ToAddress1> <ToAddress2> <ToCity> <ToState> <ToZip> <ToZip4>	
	
USPS SIGNATURE TRACKING #	
	
<SignatureConfirmationNumber>	
Electronic Rate Approved # 699320	

*USPS Priority Shipping Label*

## Shipping Label Workflow

Shipping labels can be produced at the time a shipment is created, or later. Shipping labels are stored in PDF format and are downloaded to your computer.

1

**Administrator submits shipping label request.** The store Administrator completes the information necessary to generate labels, and submits the request.

2

**Request sent to carrier.** Magento contacts the shipping carrier, and creates an order in the carrier's system. A separate order is created for each package that is shipped.

3

**Carrier sends label and tracking number.** The carrier sends the shipping label and tracking number for the shipment.

- A single shipment with multiple packages receives multiple shipping labels.
- If you generate the same shipping labels multiple times, the original tracking numbers are preserved.
- For returned products with RMA numbers, the old tracking numbers are replaced with new ones.

4

**Administrator downloads and prints the label.** After the shipping label is generated, the new shipment is saved and the label can be printed. If the shipping label cannot be created due to problems with the connection or any other reason, the shipment is not created.

Depending on your browser settings, the PDF file can be opened and printed. Each label appears on a separate page in the PDF.

## Configuring Shipping Labels

The following settings must be made at the product level, as well as in the configuration of each carrier that is used to print labels. To print labels, all carriers require that you open an account. Then, complete the configuration in your store for each carrier that you plan to use.

### Step 1: Verify the Country of Manufacture

The country of manufacture is required for all products that are shipped internationally by USPS and FedEx. If you have many products that need to be updated, you can either **import** the updates, or use the Inventory grid to update multiple records.

1. On the Admin sidebar, tap **Products**. Then under **Inventory**, choose **Catalog**.

#### Method 1: Update a Single Record

- a. In the grid, find the product to be updated, and open in edit mode.
- b. In the panel on the left under **Advanced Settings**, choose **Autosettings**.
- c. Update the **Country of Manufacture** field.
- d. When complete, tap **Save**.

The screenshot shows the 'Autosettings' panel in the Magento Admin interface. The panel is titled 'Autosettings' and has an 'Add Attribute' link in the top right corner. The settings are organized into a list of fields with their respective values and view types:

- Short Description:** A rich text editor with a toolbar showing options like Bold, Italic, Underline, Bulleted List, Numbered List, Link, Unlink, and more. The view type is '[STORE VIEW]'.
- Visibility:** A dropdown menu set to 'Catalog, Search'. The view type is '[STORE VIEW]'.
- Set Product as New from Date:** A date picker field. The view type is '[WEBSITE]'.
- Set Product as New to Date:** A date picker field. The view type is '[WEBSITE]'.
- Country of Manufacture:** A dropdown menu. A callout box points to this field with the text 'Country of Manufacture'. The view type is '[WEBSITE]'.
- Allow Gift Message:** A dropdown menu set to 'No' and a checkbox for 'Use Config Settings' which is checked. The view type is '[GLOBAL]'.
- Allow Gift Wrapping:** A dropdown menu set to 'Yes' and a checkbox for 'Use Config Settings' which is checked. The view type is '[STORE VIEW]'.
- Price for Gift Wrapping:** A text field with a dollar sign prefix. The view type is '[WEBSITE]'.
- Enable RMA:** A dropdown menu set to 'Use config'. The view type is '[WEBSITE]'.

*Country of Manufacture*

Method 2: Update Multiple Records

- a. In the grid, mark the checkbox of each product to be updated. For example, all products that are manufactured in China.
- b. Set the **Actions** control to “Update Attributes.” Then, tap **Submit**.
- c. In the **Update Attributes** form, find the **Country of Manufacture** field and mark the **Change** checkbox. Then, choose the country.
- d. When complete, tap **Save**.

Step 2: Verify the Store Information

- 1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
  - 2. In the panel on the left, under **Sales**, choose **Shipping Settings**. then, do the following:
    - a. Expand ☺ the **Origin** section, and verify that the following fields are complete:
- |                       |  |
|-----------------------|--|
| Street Address        | The street address of the place from which shipments are sent. For example, the location of your company or warehouse. This field is required for shipping labels. |
| Street Address Line 2 | Any additional address information, such as the floor, entrance and so on. We strongly recommend that you use this field.  |

Origin

Country

United States

[WEBSITE]

Region/State

California

[WEBSITE]

ZIP/Postal Code

90034

[WEBSITE]

City

[WEBSITE]

Street Address

[WEBSITE]

Street Address Line 2

[WEBSITE]

Origin


- b. In the panel on the left under **Sales**, choose **Shipping Methods**. Then, expand ☺ the **USPS** section, and verify that the following fields are complete:

Secure Gateway URL	Magento automatically enters the gateway URL.
Password	The password is provided by USPS, and gives you access to their system through Web Services.
Length, Width Height, Girth	The default dimensions of the package. To make these fields appear, set Size to “Large.”

- c.** Expand  the **FedEx** section, and verify that the following fields are complete:

- Meter Number
- Key
- Password

This information is provided by the carrier, and is required to gain access to their system through Web Services.

- d.** In the panel on the left under **General**, choose **General**. Expand  the **Store Information** section, and verify that the following fields are complete:

Store Name	The name of the store or store view.
Store Contact Telephone	The telephone number of the primary contact for the store or store view.
Country	The country where your store is based.
VAT Number	If applicable the Value Added Tax number of your store. (Not required for stores based in the U.S.)
Store Contact Address	The street address of the primary contact for the store or store view.

- e.** If you have multiple stores, and the contact information differs from the default, set **Store View** for each, and verify that the information is complete. If the information is missing, you’ll get an error when you try to print the labels.

Store Information

Store Name

store view

Store Phone Number

store view

Store Hours of Operation

store view

Country

website

--Please Select--

Region/State

website

ZIP/Postal Code

website

City

website

Street Address

website

Street Address Line 2

website

VAT Number

website

Validate VAT Number

Store Information

3. When complete, tap **Save Config.**

Carrier Requirements

CARRIER	REQUIREMENTS
USPS	Requires a USPS account.
UPS	Requires a UPS account. Shipping labels are available only for shipments that originate in the U.S. Specific credentials are required for stores outside the US.
FedEx	Requires a FedEx account. For stores outside of the U.S., shipping labels are supported for international shipments only. FedEx does not allow domestic shipments that originate outside of the U.S
DHL	Requires a DHL account. Shipping labels are supported only for shipments that originate in the U.S.

## Creating Shipping Labels

To create shipping labels, you must first set up your shipping carrier account to support labels. Then, follow the prompts to enter a description of the package and its contents.

### Process Overview:

Step 1: [Contact Your Shipping Carriers](#)

Step 2: [Update the Configuration for Each Carrier](#)

Step 3: [Create Shipping Labels](#)

Step 4: [Print the Labels](#)

### Step 1: Contact Your Shipping Carriers

Before you begin, make sure that your shipping accounts are set up to process labels. Some carriers might charge an additional fee to add shipping labels to your account.

1. Contact each carrier that you use to activate shipping labels for your store.
2. Follow the instructions provided by each carrier to add shipping label support to your account.

FedEx      Contact [FedEx Web Services](#) regarding their label evaluation process.

USPS      Contact [uspstechsupport@esecurecare.net](mailto:uspstechsupport@esecurecare.net) to request that API Signature Confirmation V3 be enabled for your live USPS API Access account.

UPS      Contact [UPS](#) to confirm your account type supports shipping labels. To generate shipping labels, you must use the UPS XML option.

DHL      Contact the [DHL Resource Center](#) to learn more about their services or send an inquiry through their [Contact Center](#).

### Step 2: Update the Configuration for Each Carrier

1. Make sure that your [Store Information](#) is complete.
2. Follow the instructions below for each carrier account that has been activated for label printing.



## UPS Configuration

United Parcel Service ships both domestically and internationally. However, shipping labels can be generated only for shipments that originate within the United States.

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Shipping Methods**.
3. Expand ☑ the **UPS** section. Then, verify that your UPS **Shipper Number** is correct. Your Shipper Number appears only when United Parcel Service XML is enabled.
4. When complete, tap **Save Config**.


## USPS Configuration

The United States Postal Service ships both domestically and internationally.

1. Continuing in the **Shipping Methods** configuration, expand ☑ the **USPS** section. Then, do the following:
  - a. Verify that the **Secure Gateway URL** is entered. The correct URL should be entered automatically.
  - b. Enter the **Password** provided to you by USPS.
  - c. Set **Size** to “Large.” Then, enter the following dimensions:
    - Length
    - Width
    - Height
    - Girth
2. When complete, tap **Save Config**.


## FedEx Configuration

FedEx ships domestically and internationally. Stores located outside the United States can create FedEx labels for international shipments only.

1. Continuing in the **Shipping Methods** configuration, expand  the **FedEx** section. Then, make sure that the following FedEx credentials are correct:
  - Meter Number
  - Key
  - Password
2. When complete, tap **Save Config.**

## DHL Configuration

DHL provides international shipping services.

1. Continuing in the **Shipping Methods** configuration, expand  the **DHL** section. Then, do the following:
  - a. Verify that the **Gateway URL** is entered. The correct URL should be entered automatically.
  - b. Make sure that the following credentials are complete:
    - Access ID
    - Password
    - Account Number
2. When complete, tap **Save Config.**

### Step 3: Create Shipping Labels

#### Process Overview:

Method 1: [Create Label for New Shipment](#)

Method 2: [Create Label for Existing Shipment](#)

#### Method 1: Create Label for New Shipment

1. On the Admin sidebar, tap **Sales**. Then under **Operations**, choose **Orders**.
2. Find the order in the grid, and open the record. The status of the order must be either “Pending” or “Processing.”
3. In the upper-right corner, tap **Ship**. Then, confirm the shipping information according to carrier requirements.
4. In the lower-right corner, mark the **Create Shipping Label** checkbox. Then, tap **Submit Shipment**, and do the following:
  - a. To add products from the order to the package, tap **Add Products**. The Quantity column shows the maximum number of products that are available for the package.
  - b. Mark the checkbox of each product to be added to the package, and enter the **Quantity** of each. Then, tap **Add Selected Product(s) to Package**.
    - To add a new package, tap **Add Package**.
    - To delete a package, tap **Delete Package**.

If you use a package type other than the default, or require a signature, the cost of shipping might differ from what you have charged the customer. Any difference in the cost of shipping is not reflected in your store.

5. When complete, tap **OK**.

If you need to cancel an order, tap **Cancel**. A shipping label will not be created, and the Create Shipping Label checkbox is cleared.

Magento connects to the shipping carrier system, submits the order, and receives a shipping label and tracking number for each package.

- If the label is successfully created, the shipment is submitted, the tracking number appears in the form, and the label is ready to print.
- If the carrier cannot create the label due to the problems with connection, or for any other reason, the shipment is not processed.

## Method 2: Create Label for Existing Shipment

1. On the Admin sidebar, tap **Sales**. Then under **Operations**, choose **Orders**.
2. Find the order in the grid, and open the Shipping form. Then, do the following:
  - a. In the Shipping and Tracking Information section, tap **Create Shipping Label**.
  - b. Distribute the ordered product(s) to the appropriate package(s), and tap **OK**.
  - c. To review the package information, tap **Show Packages**.

Magento connects to the shipping carrier system, submits an order, and receives a shipping label and a tracking number.

If a shipping label for this shipment already exists in the system, it is replaced with a new one. However, existing tracking numbers are not replaced. Any new tracking number is added to the existing one.

## Step 4: Print the Labels

Shipping labels are generated in PDF format, and can be printed from the Admin. Each label includes the order number and package number.

Because an individual shipment order for each package is created, multiple shipping labels might be received for a single shipment.

### Process Overview:

Method 1: [Print Label from Shipment Form](#)

Method 2: [Print Labels for Multiple Orders](#)

### Method 1: Print Label from Shipment Form

1. On the Admin sidebar, tap **Sales**. Then, do one of the following:
  - Choose **Orders**. Find the order in the grid, and open the record. In the panel on the left, choose **Shipments**. Then, open the shipment record.
  - Choose **Shipments**. Find the order in the grid, and open the record.
2. To download the PDF file, go to the Shipping and Tracking section of the form, and tap **Print Shipping Label**. Depending on your browser settings, the shipping labels can be viewed and printed directly from the PDF file.

The Print Shipping Label button appears only after the carrier generates labels for the shipment. If the button is missing, click **Create Shipping Label**. The button appears after Magento receives the label from the carrier.

### Method 2: Print Labels for Multiple Orders

1. On the Admin sidebar, tap **Sales**. Then, choose one of the following:
  - Orders
  - Shipments
2. In the grid, mark the checkbox of each order with shipping labels to be printed.
3. Set the **Actions** control to "Print Shipping Labels."
4. Tap **Submit**.

A complete set of shipping labels is printed for each shipment that is related to the selected orders.

### Required Carrier Configuration Settings

SETTING	DESCRIPTION
Type	Package types differ by carrier and method. The default package type for each carrier is initially selected. USPS does not require the package type for domestic shipments.
Customs Value	(International shipments only) The declared value or sales price of the contents of an international shipment.
Total Weight	The total weight of all products added to the package is calculated automatically. The value can also be changed manually, and entered as pounds or kilograms.
Length, Width, Height	(Optional) The package dimensions are used for custom packages only. You can specify the measurements units as inches or centimeters.

**Required Carrier Configuration Settings (cont.)**

SETTING	DESCRIPTION
Not Required	No confirmation of delivery is sent to the store by the shipping carrier.
No Signature	A delivery confirmation without the signature of the recipient is sent to the store by the shipping carrier.
Signature Required	The shipping carrier obtains the signature of the recipient and provides the store with a printed copy.
Direct	(FedEx Only) FedEx obtains a signature from someone at the delivery address. If no one is available to sign for the package, the carrier tries to deliver the package at another time.
Indirect	(FedEx Residential Deliveries Only) FedEx obtains the signature of someone, possibly a neighbor or building manager, at the delivery address. The recipient can leave a signed FedEx door tag to authorize the package to be left without anyone present to sign for it.
Contents	<p>(USPS Only) Select one of the following descriptions of the package:</p> <p>Gift</p> <p>Documents</p> <p>Commercial Sample</p> <p>Returned Goods</p> <p>Merchandise</p> <p>Other</p>
Explanation	(USPS Only) A detailed description of the package contents.
Adult Required	The shipping carrier obtains the signature of an adult recipient and provides the store with a printed copy.

## Label Packages

The Create Packages window appears when you choose to create a shipping label. You can start configuring the first package immediately.

### To configure a package:

1. Complete the fields as described below.

If you select the non-default value in the Type field or choose to require a signature confirmation, the price of a shipment may differ from the one you charged to the customer.

2. To view a list of shipped products and add them to the package, tap **Add Products**.

The Qty column shows the maximum quantity that is available to add. For the first package, the number is the total quantity of the product to be shipped.

3. Specify the products and quantities. To add the products to the package, tap **Add Selected Product(s) to Package**.

- To add a new package, tap **Add Package**. You can add several packages, and edit them at the same time.
- To delete a package, tap **Delete Package**.

After products are added to the package, the quantity cannot be edited directly.

### To increase the quantity:

1. Tap **Add Selection**.
2. Enter the additional quantity.

The number is added to the previous quantity of the product in the package.

**To decrease the quantity:**

1. Delete the product from the package.
2. Tap **Add Selection**.
3. Enter the new, smaller value.

After you distribute all products, the total number of the packages you are going to use equals the number of the last package in the list. The OK button is disabled until all shipped items are distributed to packages, and all necessary information is complete.

4. When complete, tap **OK** to generate the labels.

If you need to stop the process, tap **Cancel**. The packages are not saved, and the shipping label process is canceled.



## Field Descriptions

FIELD	DESCRIPTION
Type	<p>Specifies the type of a package. Select one of the predefined values. Available package types are different for each shipping carrier.</p> <p>When the Create Packages pop-up window opens, the default package for the shipping carrier appears in the Type field. If you select a package that is not designed by a shipping carrier, you must enter the dimensions of the package.</p> <p>For shipping labels created for DHL, FedEx, and UPS shipments, the “Type of Goods” field is set to “Merchandise.” For USPS, the Type field reflects the value from the Contents field in the Create Packages window.</p>
Total Weight	<p>The total weight of a package. The field is pre-populated with the total weight of products in a package. The unit of measurement can be set to either pounds or kilograms.</p>
Length	<p>The length of a package, integer and floating point numbers. The field is enabled if the custom package type is used. The unit of measurement can be set to either inches or centimeters.</p>

**Field Descriptions (cont.)**

FIELD	DESCRIPTION												
Width	The width of a package, integer and floating point numbers. The field is enabled if the custom package type is used. The measurement units can be specified using the drop-down menu next to the Height field; select between inches and centimeters.												
Height	The height of a package, integer and floating point numbers. The field is enabled if the custom package type is used. The measurement units can be specified using the drop-down menu next to the Height field; select between inches and centimeters.												
Signature	<p>Confirmation Defines delivery confirmation. Options:</p> <table> <tr> <td>Not Required</td><td>No delivery confirmation letter is sent to you.</td></tr> <tr> <td>No Signature</td><td>A delivery confirmation letter without a recipient's signature is sent to you.</td></tr> <tr> <td>Signature Required</td><td>The shipping carrier obtains the recipient's signature and provides you with its printed copy.</td></tr> <tr> <td>Adult Required</td><td>The shipping carrier obtains the adult recipient's signature and provides you with its printed copy.</td></tr> <tr> <td>Direct (FedEx only)</td><td>FedEx obtains a signature from someone at the delivery address and reattempts delivery if no one is available to sign for the package.</td></tr> <tr> <td>Indirect (FedEx only)</td><td> <p>FedEx obtains a signature in one of three ways: (1) from someone at the delivery address; (2) from a neighbor, building manager or other person at a neighboring address; or (3) the recipient can leave a signed FedEx Door Tag authorizing release of the package without anyone present. Available for residential deliveries only.</p> <p>The options may vary slightly for different shipping methods. For the most up to date information refer to shipping carrier's resources.</p> </td></tr> </table>	Not Required	No delivery confirmation letter is sent to you.	No Signature	A delivery confirmation letter without a recipient's signature is sent to you.	Signature Required	The shipping carrier obtains the recipient's signature and provides you with its printed copy.	Adult Required	The shipping carrier obtains the adult recipient's signature and provides you with its printed copy.	Direct (FedEx only)	FedEx obtains a signature from someone at the delivery address and reattempts delivery if no one is available to sign for the package.	Indirect (FedEx only)	<p>FedEx obtains a signature in one of three ways: (1) from someone at the delivery address; (2) from a neighbor, building manager or other person at a neighboring address; or (3) the recipient can leave a signed FedEx Door Tag authorizing release of the package without anyone present. Available for residential deliveries only.</p> <p>The options may vary slightly for different shipping methods. For the most up to date information refer to shipping carrier's resources.</p>
Not Required	No delivery confirmation letter is sent to you.												
No Signature	A delivery confirmation letter without a recipient's signature is sent to you.												
Signature Required	The shipping carrier obtains the recipient's signature and provides you with its printed copy.												
Adult Required	The shipping carrier obtains the adult recipient's signature and provides you with its printed copy.												
Direct (FedEx only)	FedEx obtains a signature from someone at the delivery address and reattempts delivery if no one is available to sign for the package.												
Indirect (FedEx only)	<p>FedEx obtains a signature in one of three ways: (1) from someone at the delivery address; (2) from a neighbor, building manager or other person at a neighboring address; or (3) the recipient can leave a signed FedEx Door Tag authorizing release of the package without anyone present. Available for residential deliveries only.</p> <p>The options may vary slightly for different shipping methods. For the most up to date information refer to shipping carrier's resources.</p>												

**Field Descriptions (cont.)**

FIELD	DESCRIPTION
Contents	(Available for USPS shipments only) Description of the package contents. Options: Gift Documents Commercial Sample Returned Goods Merchandise Other
Explanation	(USPS shipments only) Detailed description of the package content.

# R EPORTS

## Contents

In this section of the guide, you will learn how to filter data and online generate reports. The report data can be opened in a spreadsheet or imported into other applications.

Reports Menu

Statistics

Marketing

Reviews

Sales

Customers

Products

Private Sales

New Relic Reporting

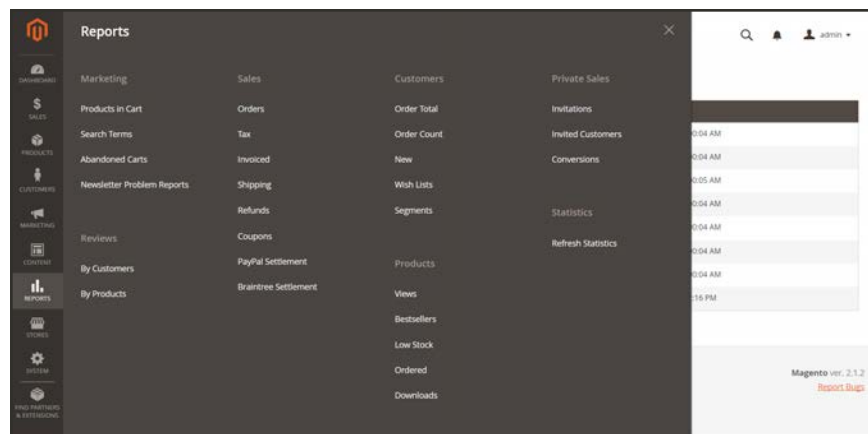
New Relic Queries



## CHAPTER 73:

# Reports Menu

Magento Commerce provides a wide selection of reports to keep you informed on your marketing efforts, sales products, and customer activity. The Reports menu provides easy access to current information about your sales, products, customers, and promotions.



*Reports Menu*

## To display the Reports menu:

On the Admin sidebar, tap **Reports**.

## Menu Options

### Marketing Reports

---

A selection of marketing reports, including Products in Cart, Search Terms, Abandoned Carts, and Newsletter Problem Reports.

### Review Reports

---

The selection of product review reports includes By Customer and By Product.

### Sales Reports

---

The selection of sales reports includes Orders, Tax, Invoiced, Shipping, Refunds, Coupons, PayPal Settlement, and Braintree Settlement.

### Customer Reports

---

The selection of customer reports includes Order Total, Order Account, New, Wish Lists, and Segments.

### Product Reports

---

The selection of product reports includes Views, Bestsellers, Low Stock, Ordered, and Downloads.

### Private Sales

---

The selection of reports for private sales and events includes Invitation, Invited Customers, and Conversions.

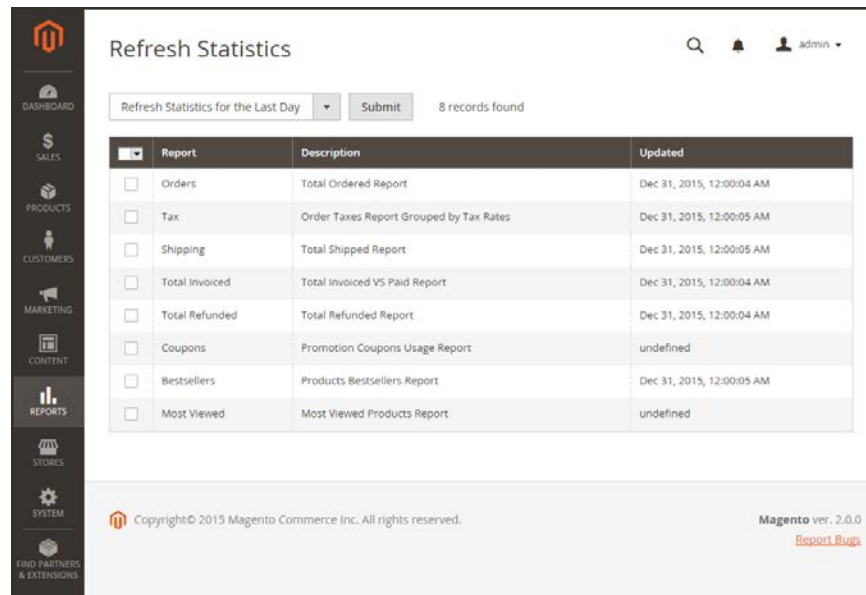
### Statistics

---

Statistics is a tool that reduces the performance impact of generating reports by calculating and storing statistical data. Rather than recalculate the statistics every time a report is generated, the stored statistics are used until you refresh the statistics.

## Refresh Statistics

To reduce the performance impact of generating sales reports, Magento calculates and stores the required statistics for each report. Rather than recalculate the statistics every time a report is generated, the stored statistics are used, unless you refresh the statistics. To include the most recent data, the report statistics must be refreshed before a sales report is generated.



The screenshot shows the 'Refresh Statistics' page in the Magento Admin interface. The sidebar on the left has the 'REPORTS' menu item highlighted. The main content area has a title 'Refresh Statistics' and a search bar. Below the title, there is a dropdown menu set to 'Refresh Statistics for the Last Day' and a 'Submit' button. A message indicates '8 records found'. A table lists the reports with checkboxes for refreshing them. The table has three columns: 'Report', 'Description', and 'Updated'.

Report	Description	Updated
<input type="checkbox"/> Orders	Total Ordered Report	Dec 31, 2015, 12:00:04 AM
<input type="checkbox"/> Tax	Order Taxes Report Grouped by Tax Rates	Dec 31, 2015, 12:00:05 AM
<input type="checkbox"/> Shipping	Total Shipped Report	Dec 31, 2015, 12:00:05 AM
<input type="checkbox"/> Total Invoiced	Total Invoiced VS Paid Report	Dec 31, 2015, 12:00:04 AM
<input type="checkbox"/> Total Refunded	Total Refunded Report	Dec 31, 2015, 12:00:04 AM
<input type="checkbox"/> Coupons	Promotion Coupons Usage Report	undefined
<input type="checkbox"/> Bestsellers	Products Bestsellers Report	Dec 31, 2015, 12:00:05 AM
<input type="checkbox"/> Most Viewed	Most Viewed Products Report	undefined

At the bottom of the page, there is a copyright notice: 'Copyright © 2015 Magento Commerce Inc. All rights reserved.' and the version 'Magento ver. 2.0.0'. There is also a link to 'Report Bugs'.

### *Refresh Statistics*

#### To refresh report statistics:

1. On the Admin sidebar, tap **Reports**. Then under Statistics, choose **Refresh Statistics**.
2. In the list, mark the checkbox of each report to be refreshed.
3. Set the **Actions** control to one of the following:
  - Refresh Lifetime Statistics
  - Refresh Statistics for the Last Day
4. When complete, tap **Submit**.

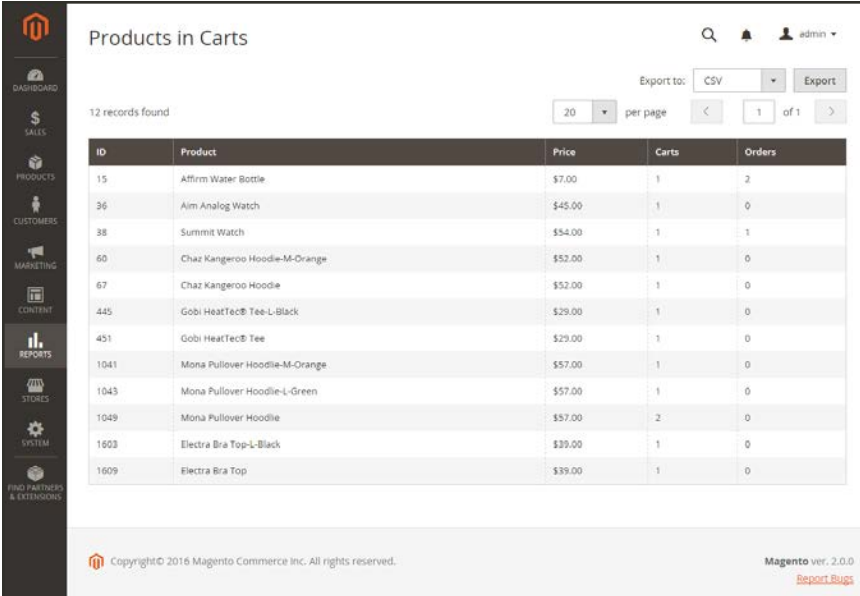




## CHAPTER 74:

# Marketing Reports

Marketing reports provide information about the status of shopping carts, the use of search terms, and newsletter transmissions.



ID	Product	Price	Carts	Orders
15	Affirm Water Bottle	\$7.00	1	2
36	Aim Analog Watch	\$45.00	1	0
38	Summit Watch	\$54.00	1	1
60	Chaz Kangaroo Hoodie-M-Orange	\$52.00	1	0
67	Chaz Kangaroo Hoodie	\$52.00	1	0
445	Gobi HeatTec® Tee-L-Black	\$29.00	1	0
451	Gobi HeatTec® Tee	\$29.00	1	0
1041	Mona Pullover Hoodie-M-Orange	\$57.00	1	0
1043	Mona Pullover Hoodie-L-Green	\$57.00	1	0
1049	Mona Pullover Hoodie	\$57.00	2	0
1603	Electra Bra Top-L-Black	\$39.00	1	0
1609	Electra Bra Top	\$39.00	1	0

*Products in Cart Report*

## Reports

**Products in Cart**

12 records found

ID	Product	Price	Carts	Orders
13	Adidas Urban Boots	\$1.00	1	0
24	Arm Knitting Watch	\$40.00	1	0
46	Surf and Beach	\$34.00	1	1
45	Chai Fragrances Headband Orange	\$50.00	1	0
47	Chai Fragrances Headband	\$50.00	1	0
445	Gold Leafback Tea Lids	\$20.00	1	0
497	Gold Leafback Tea	\$20.00	1	0
1341	Missy Pullover Headband Orange	\$50.00	1	0
1343	Missy Pullover Headband Green	\$50.00	1	0
1345	Missy Pullover Headband	\$50.00	2	0
1353	Electric Box Fans Black	\$30.00	1	0
1359	Electric Box Fan	\$30.00	1	0

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### Products in Cart

The Products in Cart Report lists all products currently in shopping carts, and includes the name and price of each item, the number of carts with the item, and the number of times each item has been ordered.

**Search Terms Report**

12 records found

ID	Search Query	Store	Results	Hits
23	hugoboss	Missy Pullover Headband Orange	4	1
21	hugoboss	Missy Pullover Headband Green	36	1
18	hugoboss	Missy Pullover Headband	9	1
17	hugoboss	Missy Pullover Headband Orange	4	1
16	hugoboss	Missy Pullover Headband Green	12	1
15	hugoboss	Missy Pullover Headband	40	1
14	hugoboss	Missy Pullover Headband Orange	20	1
8	hugoboss	Missy Pullover Headband Green	9	1

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### Search Terms

The Search Terms Report shows what your customers are looking for in each store view. The report includes the number of matching items found in the catalog, and how many times the search term has been used.

**Abandoned Carts**

3 records found

Customer	Email	Products	Quantity	Subtotal	Created	Updated	# Orders
Customer	john.doe@domain.com	1	1	\$10.00	2014-10-15 10:15:10	2014-10-15 10:15:10	0
Customer	jane.smith@domain.com	2	2	\$20.00	2014-10-15 10:15:10	2014-10-15 10:15:10	0

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### Abandoned Carts

The Abandoned Carts Report lists all registered customers who have abandoned carts that have not yet expired. The report includes the customer name and email address, the number of products in the cart and subtotal, the date created, and date last updated.

**Newsletter Problems Report**

3 records found

ID	Subscriber	Queue Date	Queue Subject	Error Code	Error Text
1	john.doe@domain.com	2014-10-15 10:15:10	Newsletter	10001	Subscriber not found
2	jane.smith@domain.com	2014-10-15 10:15:10	Newsletter	10002	Subscriber not found

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### Newsletter Problems

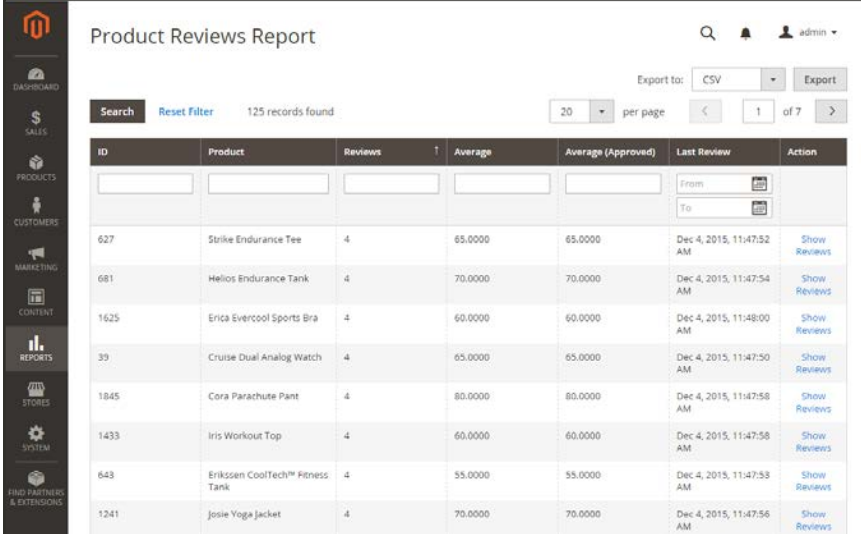
The Newsletter Problems Report includes information about any newsletter queue that failed to transmit successfully. The report includes the name of each subscriber, and queue date and subject, the information about the error.

## CHAPTER 75:

# Review Reports

The Review Reports provide information about product reviews by customer and by product.

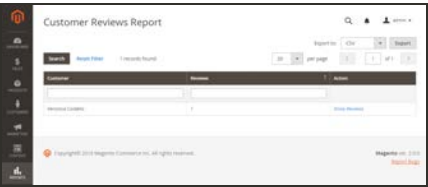
- By Customers
- By Products



ID	Product	Reviews	Average	Average (Approved)	Last Review	Action
627	Strike Endurance Tee	4	65.0000	65.0000	Dec 4, 2015, 11:47:52 AM	<a href="#">Show Reviews</a>
681	Helios Endurance Tank	4	70.0000	70.0000	Dec 4, 2015, 11:47:54 AM	<a href="#">Show Reviews</a>
1625	Erica Evercool Sports Bra	4	60.0000	60.0000	Dec 4, 2015, 11:48:00 AM	<a href="#">Show Reviews</a>
39	Cruise Dual Analog Watch	4	65.0000	65.0000	Dec 4, 2015, 11:47:50 AM	<a href="#">Show Reviews</a>
1845	Cora Parachute Pant	4	80.0000	80.0000	Dec 4, 2015, 11:47:58 AM	<a href="#">Show Reviews</a>
1433	Iris Workout Top	4	60.0000	60.0000	Dec 4, 2015, 11:47:58 AM	<a href="#">Show Reviews</a>
648	Erikssen CoolTech™ Fitness Tank	4	55.0000	55.0000	Dec 4, 2015, 11:47:53 AM	<a href="#">Show Reviews</a>
1241	Josie Yoga Jacket	4	70.0000	70.0000	Dec 4, 2015, 11:47:56 AM	<a href="#">Show Reviews</a>

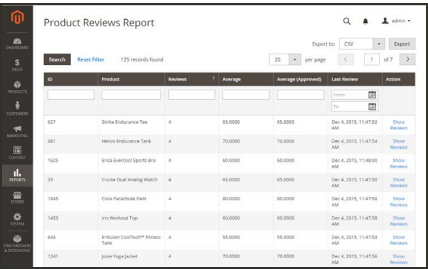
*Review Report by Product*

Reports



By Customers

The Customer Reviews Report lists all customer who have submitted product reviews. The report includes the number of reviews submitted by each customer, and a link to the list of reviews.



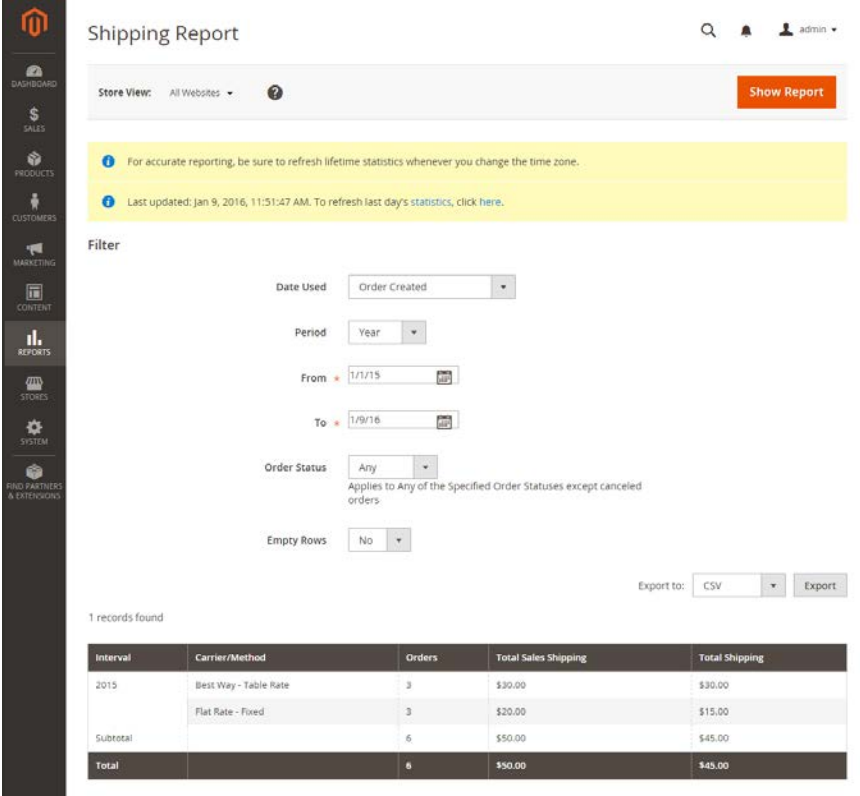
By Products

The Product Reviews Report lists all products that have been reviewed by customers. The report includes the number of reviews and average rating, the product was last reviewed, and a link to the list of reviews for each product.

## CHAPTER 76:

# Sales Reports

The selection of sales reports includes Orders, Tax, Invoiced, Shipping, Refunds, Coupons, and PayPal Settlement.



**Shipping Report**

Store View: All Websites [?](#) [Show Report](#)

For accurate reporting, be sure to refresh lifetime statistics whenever you change the time zone.  
Last updated: Jan 9, 2016, 11:51:47 AM. To refresh last day's statistics, click [here](#).

**Filter**

Date Used: Order Created

Period: Year

From: 1/1/15

To: 1/9/16

Order Status: Any  
Applies to Any of the Specified Order Statuses except canceled orders

Empty Rows: No

Export to: CSV [Export](#)

1 records found

Interval	Carrier/Method	Orders	Total Sales Shipping	Total Shipping
2015	Best Way - Table Rate	3	\$30.00	\$30.00
	Flat Rate - Fixed	3	\$20.00	\$15.00
Subtotal		6	\$50.00	\$45.00
Total		6	\$50.00	\$45.00

*Shipping Report*

## Reports

## Orders

The Orders Report can be filtered by time interval, date and status. The report includes the number of orders placed and canceled, with totals for sales, amounts invoiced, refunded, tax collected, shipping charged, and discounts.

## Tax

The Tax Report can be filtered by time interval, date, and status. The report includes the tax rule applied, tax rate, number of orders, and amount of tax charged.

## Invoiced

The Invoice Report can be filtered by time interval, date, and status. The report includes the number of orders and invoices during the time period, with amounts invoiced, paid, and unpaid.

**Shipping Report**

Store View: All Stores

For accurate reporting, be sure to refresh the data whenever you change the time zone.  
Last updated Jan 9, 2016, 11:51 AM. To refresh last day's statistics, click here.

**Filter**

Date Used: Order Created

Period: Year

From: 2015

To: 2016

Order Status: Any  
Applies to any of the specified Order Statuses except canceled orders

Empty Rows: No

1 records found

Interval	Carrier Method	Orders	Total Sales Shipping	Total Shipping
2015	Best Way - Table Rate	2	\$30.00	\$30.00
	Flat Rate - Fixed	2	\$10.00	\$10.00
<b>Subtotal</b>		<b>4</b>	<b>\$40.00</b>	<b>\$40.00</b>
<b>Total</b>		<b>4</b>	<b>\$40.00</b>	<b>\$40.00</b>

## Shipping

The Shipping Report can be filtered by time interval, date, and status. The report includes the number of orders for carrier or shipping method used, with amounts for total sales shipping and total shipping.

**Refunds Report**

Store View: All Stores

For accurate reporting, be sure to refresh the data whenever you change the time zone.  
Last updated Jan 9, 2016, 11:51 AM. To refresh last day's statistics, click here.

**Filter**

Date Used: Order Created

Period: Year

From: 2015

To: 2016

Order Status: Any  
Applies to any of the specified Order Statuses except canceled orders

Empty Rows: No

0 records found

Interval	Number of Refunds	Total Refunded	Total Refunded Online
2015	0	\$0.00	\$0.00
<b>Total</b>	<b>0</b>	<b>\$0.00</b>	<b>\$0.00</b>

## Refunds

The Refunds Report can be filtered by time interval, date, and status. The report includes the number of refunded orders, and total amount refunded online and offline.

**Coupons Report**

Store View: All Stores

For accurate reporting, be sure to refresh the data whenever you change the time zone.  
Last updated Jan 9, 2016, 11:51 AM. To refresh last day's statistics, click here.

**Filter**

Date Used: Order Created

Period: Year

From: 2015

To: 2016

Order Status: Any  
Applies to any of the specified Order Statuses except canceled orders

Empty Rows: No

0 records found

Interval	Coupon Code	Price Rule	Used	Sales Subtotal	Order Discount	Sales Total	Subtotal	Discount	Total
2015			0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Total</b>			<b>0</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>

## Coupons

The Coupons Report can be filtered by time interval, date, and status. The report includes each coupon code used during the specified time interval, related price rule, and number of times used with totals and subtotals for sales and discounts.

**PayPal Settlement Reports**

Fetch Updates

Search: Reset Filter 0 records found

Report Date	Merchant Account	Transaction ID	Invoice ID	PayPal Reference ID	Event	Start Date	End Date	Gross Amount	Fee Amount
2015								\$0.00	\$0.00
<b>Total</b>								<b>\$0.00</b>	<b>\$0.00</b>

We couldn't find any records.

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## PayPal Settlement

The PayPal Settlement Report can be filtered by date, merchant account, transaction ID, invoice ID, or PayPal reference ID. The report includes the type of event, such as a debit card transaction, the start and finish dates, gross amount, and related fees. The report can be automatically updated with the most current data from PayPal.

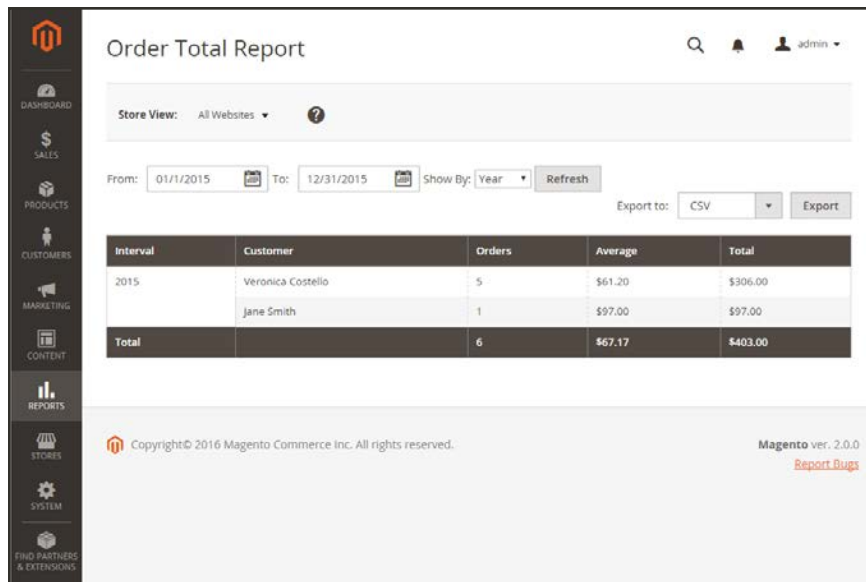




## CHAPTER 77:

# Customer Reports

Customer reports provide insight into customer activity during a specified period of time or date range.



The screenshot shows the 'Order Total Report' page in the Magento admin interface. The left sidebar contains navigation links for Dashboard, Sales, Products, Customers, Marketing, Content, Reports (active), Stores, System, and Find Partners & Extensions. The main content area has a search bar, a 'Store View' dropdown set to 'All Websites', and filters for 'From' (01/11/2015), 'To' (12/31/2015), and 'Show By' (Year). There are 'Refresh' and 'Export' buttons. The 'Export to' dropdown is set to 'CSV'. A table displays the report data with columns for Interval, Customer, Orders, Average, and Total. The table shows data for 2015, including Veronica Costello and Jane Smith, and a total row. The footer includes the Magento logo, copyright notice, version (2.0.0), and a 'Report Bugs' link.

Interval	Customer	Orders	Average	Total
2015	Veronica Costello	5	\$61.20	\$306.00
	Jane Smith	1	\$97.00	\$97.00
Total		6	\$67.17	\$403.00

*Order Total Report*

## Reports

**Order Total Report**

Store View: All Websites

From: 01/11/2015 To: 12/31/2015 Order By: Year Refresh

Export to: CSV Export

Interval	Customer	Orders	Average	Total
2015	Nevada County	5	\$81.20	\$406.00
	Jane Smith	1	\$87.00	\$87.00
<b>Total</b>		<b>6</b>	<b>\$81.17</b>	<b>\$493.00</b>

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### Order Total

The Order Total Report shows customer orders for a specified time interval or date range. The report includes the number of orders per customer, average order amount, and total amount.

**Order Count Report**

Store View: All Websites

From: 01/11/2015 To: 01/06/2016 Order By: Year Refresh

Export to: CSV Export

Interval	Customer	Orders	Average	Total
2015	Nevada County	5	\$81.20	\$406.00
	Jane Smith	1	\$87.00	\$87.00
2016	We can't find records for this period.			
<b>Total</b>		<b>6</b>	<b>\$81.17</b>	<b>\$493.00</b>

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### Order Count

The Order Count Report shows the number of orders per customer for a specified time interval or date range. The report includes the number of orders per customer, average order amount, and total amount.

**New Accounts Report**

Store View: All Websites

From: 01/11/2015 To: 01/06/2016 Order By: Year Refresh

Export to: CSV Export

Interval	New Accounts	Total
2015	5	
2016	We can't find records for this period.	
<b>Total</b>	<b>5</b>	

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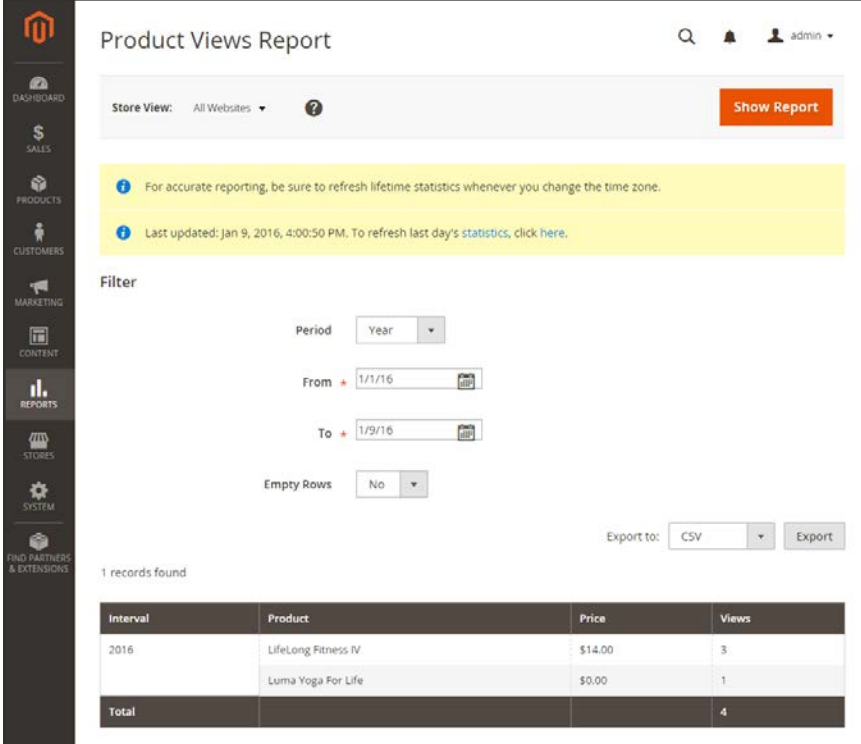
### New Accounts

The New Accounts Report shows the number of new customer accounts opened during a specified time interval or date range.

## CHAPTER 78:

# Product Reports

The product reports give you insight regarding products viewed and ordered, bestsellers, stock levels, and downloads.



**Product Views Report**

Store View: All Websites [?](#) [Show Report](#)

**Filter**

Period: Year

From: 1/1/16

To: 1/9/16

Empty Rows: No

Export to: CSV [Export](#)

1 records found

Interval	Product	Price	Views
2016	LifeLong Fitness IV	\$14.00	3
	Luma Yoga For Life	\$0.00	1
<b>Total</b>			<b>4</b>

*Product Views Report*

## Reports

**Product Views Report**

Store View: All Websites

For accurate reporting, be sure to refresh lifetime statistics whenever you change the time zone.  
Last updated: Jan 9, 2018, 4:00:50 PM. To refresh last day's statistics, click here.

Filter

Period: Year

From: 1/1/18 To: 1/1/18

Empty Rows: No

Export to: CSV

1 records found

Interval	Product	Price	Views
2018	Lifecasting Process IV	\$14.00	5
	Lovers Toga For Life	\$5.00	1
<b>Total</b>			<b>6</b>

## Product Views

The Product Views Report shows the products that have been viewed during a time interval or range of dates. The report includes the product name, price, and number of views.

**Best Sellers Report**

Store View: All Websites

For accurate reporting, be sure to refresh lifetime statistics whenever you change the time zone.  
Last updated: Jan 9, 2018, 3:20:52 PM. To refresh last day's statistics, click here.

Filter

Period: Year

From: 1/1/18 To: 1/1/18

Empty Rows: No

Export to: CSV

1 records found

Interval	Product	Price	Order Quantity
2018	Overnight Duffie	\$48.00	2
	Affixable Bookie	\$7.00	2
	Parquet Lumber® Fine Board	\$18.00	2
	Highway Lumber® 4" Straight Board Oak	\$22.00	2
	Mosses.com/Overnight Duffie	\$2.00	2
<b>Total</b>			<b>10</b>

## Bestsellers

The Bestsellers Report shows the five top-selling five during an interval of time or date range. The report includes the product name, price, and quantity ordered.

**Low Stock Report**

Store View: English

For accurate reporting, be sure to refresh lifetime statistics whenever you change the time zone.  
Last updated: Jan 9, 2018, 3:20:52 PM. To refresh last day's statistics, click here.

Filter

Period: Year

From: 1/1/18 To: 1/1/18

Empty Rows: No

Export to: CSV

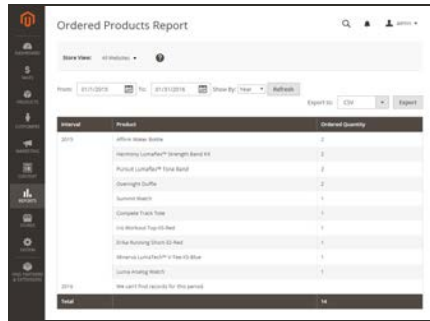
0 records found

Product	Price	Stock Quantity
We couldn't find any records.		

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## Low Stock

The Low Stock Report lists all products with stock levels within a specified range.



**Ordered Products Report**

Store View: All Websites

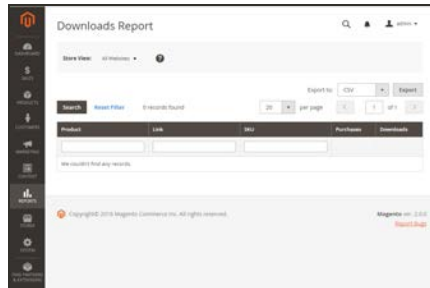
From: 01/01/2018 To: 01/01/2018 Show By: Date Refresh

Export To: CSV Export

Date	Product	Ordered Quantity
2018	Office Paper Shirts	2
	Inventory Computer* (Magento Basic Kit)	2
	Product Computer* (Basic Kit)	2
	Overnight Shirts	2
	Summer Shirts	1
	Complete Truck Tote	1
	One Worksheet Paper Kit	1
	Single Worksheet Paper Kit	1
	Advanced Computer* (Basic Kit)	1
	Single Worksheet Paper Kit	1
2019	One Worksheet Paper Kit	1
	One Worksheet Paper Kit	1
<b>Total</b>		<b>16</b>

## Ordered Products

The Ordered Products Report lists all products ordered for a specified time interval or date range. The report includes the product name and quantity ordered.



**Downloads Report**

Store View: All Websites

From: 01/01/2018 To: 01/01/2018 Show By: Date Refresh

Export To: CSV Export

Search: Reset Filter 0 records found 25 per page 1 of 1

Product	Link	SKU	Purchases	Downloads
We haven't found any records.				

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## Downloads

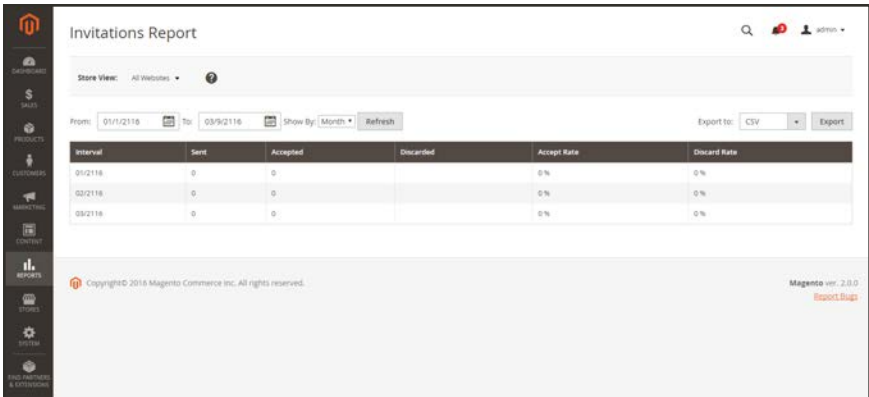
The Downloads Report lists all downloads during the specified time interval or date range. The report includes the product name, download link, and SKU, with the number of purchases and downloads.



CHAPTER 79:

# Private Sales Reports

The **Private Sales Reports** provide information about events and private sales.



Invitations Report



## Reports

The screenshot shows the 'Invitations Report' interface. It includes a sidebar with navigation icons, a top navigation bar with 'Home', 'Invitations', and 'Reports' tabs. The main content area features a table with columns: 'Invitation', 'Sent', 'Accepted', 'Discarded', 'Accepted Rate', and 'Conversion Rate'. The table contains three rows of data. Below the table, there is a footer with copyright information and a 'Reported on: 2/24' timestamp.

Invitation	Sent	Accepted	Discarded	Accepted Rate	Conversion Rate
Invitation 1	2	2	0	100%	100%
Invitation 2	2	2	0	100%	100%
Invitation 3	2	2	0	100%	100%

### Invitations

The Invitations Report shows the number of invitations sent during the specified time period, and the number accepted, and discarded.

The screenshot shows the 'Invited Customers Report' interface. It includes a sidebar with navigation icons, a top navigation bar with 'Home', 'Invitations', and 'Reports' tabs. The main content area features a table with columns: 'Customer', 'Email', 'Invitations Sent', 'Accepted', 'Discarded', 'Accepted Rate', and 'Conversion Rate'. The table contains three rows of data. Below the table, there is a footer with copyright information and a 'Reported on: 2/24' timestamp.

Customer	Email	Invitations Sent	Accepted	Discarded	Accepted Rate	Conversion Rate
Customer 1	customer1@example.com	2	2	0	100%	100%
Customer 2	customer2@example.com	2	2	0	100%	100%
Customer 3	customer3@example.com	2	2	0	100%	100%

### Invited Customers

The Invited Customers Report shows all customers who have been sent invitations to a private sale or event, and includes the name and email address, customer group, and the number of invitations sent and the number accepted.

The screenshot shows the 'Conversion Rate Report' interface. It includes a sidebar with navigation icons, a top navigation bar with 'Home', 'Invitations', and 'Reports' tabs. The main content area features a table with columns: 'Invitation', 'Conversion Rate', 'Accepted Rate', 'Discarded Rate', 'Accepted Rate', and 'Conversion Rate'. The table contains three rows of data. Below the table, there is a footer with copyright information and a 'Reported on: 2/24' timestamp.

Invitation	Conversion Rate	Accepted Rate	Discarded Rate	Accepted Rate	Conversion Rate
Invitation 1	2	2	0	100%	100%
Invitation 2	2	2	0	100%	100%
Invitation 3	2	2	0	100%	100%

### Conversions

The Conversions Report shows the number of invitations sent and accepted, the number of invitations that led to a purchase, and the conversion rate as a percentage.



## CHAPTER 80:

# New Relic Reporting

New Relic is a SaaS based subscription service that provides detailed real-time visibility into business and performance metrics for data-driven decision making.

### Step 1: Sign Up for a New Relic Account

1. Visit the [New Relic](#) website, and sign up for an account. You can also sign up for a [free trial account](#).
2. Follow the instructions on the site. When prompted choose the product that you want to install first.
3. While you are in your account, locate the following credentials that you will need to complete the configuration:

Account ID	From your New Relic account dashboard, the Account ID is the number in the URL after: /accounts
Application ID	From your New Relic account dashboard, tap New Relic APM. In the menu, choose Applications. Then, choose your application. The Application ID is the number in the URL after: /applications/
New Relic API Key	From your New Relic account dashboard, tap Account Settings. In the menu on the left under Integrations, choose Data Sharing. Your API key can be created, regenerated, or deleted from this page.
Insights API Key	From your New Relic account dashboard, tap Insights. In the menu on the left under Administration, choose API Keys. Your Insights API Key(s) appear on this page. If necessary, click the plus sign (+) next to Insert Keys to generate a key.

### Step 2: Install the New Relic Agent on Your Server

To use New Relic APM Pro to gather and transmit data, the PHP agent must be installed on your server.

1. When prompted to choose a web agent, tap **PHP**.
2. Follow the instructions to set up the PHP agent on your server. If you need help, see: [New Relic for PHP](#).

3. Make sure that cron is running on your server. To learn more, see: [Configure and run cron](#).

### Step 3: Configure Your Store

1. On the Admin menu, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **New Relic Reporting**. Then, do the following:

The screenshot shows the 'General' configuration panel for New Relic Reporting. It contains the following fields and options:

- Enable New Relic Integration**: A dropdown menu set to 'No'. To its right is a checkbox labeled 'Use system value' which is checked.
- New Relic API URL**: A text field containing 'https://api.newrelic.com/deployments.xml'. To its right is a checked checkbox labeled 'Use system value'.
- Insights API URL**: A text field containing 'https://insights-collector.newrelic.com/v1/accounts/%s/events'. Below it is a note: 'Use %s to replace the account ID in the URL'. To its right is a checked checkbox labeled 'Use system value'.
- New Relic Account ID**: An empty text field. Below it is a note: 'Need a New Relic account? [Click here to get one](#)'.
- New Relic Application ID**: An empty text field. Below it is a note: 'This can commonly be found at the end of the URL when viewing the APM after "/>

### *New Relic Reporting*

- a. Set **Enable New Relic Integration** to “Yes.”
  - b. In the **Insights API URL**, replace the percent (%) symbol with your New Relic Account ID.
  - c. Enter your **New Relic Account ID**.
  - d. Enter your **New Relic Application ID**.
  - e. Enter your **New Relic API Key**.
  - f. Enter you **Insights API Key**.
3. In the **New Relic Application Name** field, enter a name to identify the configuration for internal reference.
  4. When complete, tap **Save Config**.

## Step 4: Enable Cron for New Relic Reporting

1. Expand  the **Cron** section.



*Cron*

2. Set **Enable Cron** to "Yes."
3. When complete, tap **Save Config.**

## New Relic Queries

New Relic Insights data is based on statements that are written in New Relic Query Language (NRQL), as well as any custom parameters that you might include. Data can be returned from adhoc queries, or by queries saved to your dashboard. To learn more, see the [NRQL Reference](#) in the New Relic documentation.

### Admin Events

#### Active Admin Users

Widget Name: Active Admin Users

Description: Returns the number of active admin users.

```
SELECT uniqueCount(AdminId)
FROM Transaction
WHERE appName='<your_app_name>' SINCE 15 minutes ago
```

#### Currently Active Admins

Widget Name: Currently Active Admins

Description: Returns the names of active admin users.

```
SELECT uniques(AdminName)
FROM Transaction
WHERE appName='<your_app_name>' SINCE 15 minutes ago
```

### Recent Admin Activity

Widget Name: Recent Admin Activity

Description: Returns the number of recent admin actions.

```
SELECT count(AdminId)
FROM Transaction
WHERE appName = '<your_app_name>' FACET AdminName SINCE 1 day ago
```

### Latest Admin Activity

Widget Name: Latest Admin Activity

Description: Returns detail information about recent admin actions, including the admin username, duration, and application name.

```
SELECT AdminName, duration, name
FROM Transaction
WHERE appName='<your_app_name>' AND AdminName IS NOT NULL
AND AdminName != 'N/A' LIMIT 50
```

## Cron Events

### Category Count

Widget Name: Category Count

Description: Returns the number of application events by category during the specified time period.

```
SELECT average(CatalogCategoryCount)
FROM Cron
WHERE CatalogCategoryCount IS NOT NULL
AND appName = '<your_app_name>' TIMESERIES 2 minutes
```

### Current Catalog Count

Widget Name: Current Catalog Count

Description: Returns the average number of application events in the catalog by category during the specified time period.

```
SELECT average(CatalogCategoryCount)
FROM Cron
WHERE CatalogCategoryCount IS NOT NULL
AND CatalogCategoryCount > 0
AND appName = '<your_app_name>' SINCE 2 minutes ago LIMIT 1
```

### Active Products

Widget Name: Active Products

Description: Returns the number of application events by product during the specified time period.

```
SELECT average(CatalogProductActiveCount)
FROM Cron
WHERE CatalogProductActiveCount IS NOT NULL
AND appName = '<your_app_name>' TIMESERIES 2 minutes
```

### Active Product Count

Widget Name: Active Product Count

Description: Returns the average number of active application events by product during the specified time period.

```
SELECT average(CatalogProductActiveCount)
FROM Cron
WHERE CatalogProductActiveCount IS NOT NULL
AND CatalogProductActiveCount > 0
AND appName = '<your_app_name>' SINCE 2 minutes ago LIMIT 1
```

### Configurable Products

Widget Name: Configurable Products

Description: Returns the average number of application events for configurable products during the specified time period.

```
SELECT average(CatalogProductConfigurableCount)
FROM Cron
```

```
WHERE CatalogProductConfigurableCount IS NOT NULL

AND appName = '<your_app_name>' TIMESERIES 2 minutes
```

### Configurable Product Count

Widget Name: Configurable Product Count

Description: Returns the average number of application events by configurable product during the specified time period.

```
SELECT average(CatalogProductConfigurableCount)

FROM Cron

WHERE CatalogProductConfigurableCount IS NOT NULL

AND CatalogProductConfigurableCount > 0

AND appName = '<your_app_name>' SINCE 2 minutes ago LIMIT 1
```

### Product Count (all)

Widget Name: Product Count (all)

Description: Returns the total number of application events for all products.

```
SELECT average(CatalogProductCount)

FROM Cron

WHERE CatalogProductCount IS NOT NULL

AND appName = '<your_app_name>' TIMESERIES 2 minutes
```

### Current Product Count (all)

Widget Name: Current Product Count (all)

Description: Returns the average number of application events for all products during the specified time period.

```
SELECT average(CatalogProductCount)

FROM Cron

WHERE CatalogProductCount IS NOT NULL

AND CatalogProductCount > 0

AND appName = '<your_app_name>' SINCE 2 minutes ago LIMIT 1
```

### Customer Count

Widget Name: Customer Count

Description: Returns the average number of application events by customer.

```
SELECT average(CustomerCount)
FROM Cron
WHERE CustomerCount IS NOT NULL
AND CustomerCount > 0
AND appName = '<your_app_name>' TIMESERIES 2 minutes
```

### Current Customer Count

Widget Name: Current Customer Count

Description: Returns the average number of customers during the specified time period.

```
SELECT average(CustomerCount)
FROM Cron
WHERE CustomerCount IS NOT NULL
AND CustomerCount > 0
AND appName = '<your_app_name>' SINCE 2 minutes ago LIMIT 1
```

### Module Status

Widget Name: Module Status

Description: Returns the average number of times application modules are enabled, disabled, or installed during the specified time period.

```
SELECT average(ModulesDisabled), average(ModulesEnabled), average
(ModulesInstalled)
FROM Cron
WHERE appName = '<your_app_name>' TIMESERIES 2 minutes
```



### Current Module Status

Widget Name: Current Module Status

Description: Returns the average number of times modules were enabled, disabled, or installed during the specified time period.

```
SELECT average(ModulesDisabled), average(ModulesEnabled), average
(ModulesInstalled)
FROM Cron
WHERE appName = '<your_app_name>' SINCE 2 minutes ago LIMIT 1
```

### Website and Store Counts

Widget Name: Website and Store Counts

Description: Returns the average number of application events by website and store during the specified time period.

```
SELECT average(StoreViewCount), average(WebsiteCount)
FROM Cron
WHERE appName = '<your_app_name>' TIMESERIES 2 minutes
```

### Current Website and Store Counts

Widget Name: Current Website and Store Counts

Description: Returns the average number of current application events during the specified time period.

```
SELECT average(StoreViewCount), average(WebsiteCount)
FROM Cron
WHERE appName = '<your_app_name>' SINCE 2 minutes ago LIMIT 1
```

### Cron - All Data from Event

Widget Name: Cron - All Data from Event

Description: Returns all application event data.

```
SELECT *
```

```
FROM Cron

WHERE appName = '<your_app_name>'
```

## Customers

### Active Customer Count

Widget Name: Active Customer Count

Description: Returns the number of active customers during the specified time period.

```
SELECT uniqueCount(CustomerId)

FROM Transaction

WHERE appName = '<your_app_name>' SINCE 15 minutes ago
```

### Active Customers

Widget Name: Active Customers

Description: Returns the names of active customers during the specified time period.

```
SELECT uniques(CustomerName)

FROM Transaction

WHERE appName='<your_app_name>' SINCE 15 minutes ago
```

### Top Customers

Widget Name: Top Customers

Description: Returns the top customers during the specified time period.

```
SELECT count(CustomerId)

FROM Transaction

WHERE appName = '<your_app_name>' FACET CustomerName SINCE 1 day ago
```

### Recent Admin Activity

Widget Name: Recent Admin Activity

Description: Returns a defined number of records of recent activity, that include the customername and duration of visit.

```
SELECT CustomerName, duration, name
FROM Transaction
WHERE appName='<your_app_name>'
AND CustomerName IS NOT NULL
AND CustomerName != 'N/A' LIMIT 50
```

## Orders

### Number of Orders Placed

Widget Name: Number of Orders Placed

Description: Returns the number of orders placed during the specified time period.

```
SELECT count(`Order`)
FROM Transaction SINCE 1 day ago
```

### Total Order Value

Widget Name: Total Order Value

Description: Returns the total number of line items ordered during the specified time period.

```
SELECT sum(LineItemCount)
FROM Transaction SINCE 1 day ago
```

### Total Line Items Ordered

Widget Name: Total Line Items Ordered

Description: Returns the total number of line items ordered during the specified time period.

```
SELECT sum(LineItemCount)
FROM Transaction SINCE 1 day ago
```

# O PERATIONS



## Stores

In this section of the guide, you'll learn how to set up a store hierarchy, create attributes, and manage the settings used by each store to calculate taxes, and currency rates,

### Stores Menu

## Configuration

Our online Catalog descriptions

- Adding Store Views
- Editing a Store View
- Adding a Language
- Translating Products
- Translating Content

Adding Stores

Adding Websites

Store URLs

Using a Custom Admin URL

## Taxes

Learn how to calculate customer gross rates according to locale.

### Configuration

#### Taxes

Tax Rules

Tax Classes

Configuring Tax Classes

Default Tax Destination

EU Place of Supply for Digital Goods

Fixed Product Tax

Configuring FPT

Price Display Settings

Tax Zones and Rates

Import/Export Tax Rates

Value Added Tax (VAT)

Configuring VAT

VAT ID Validation

Configuring VAT ID Validation

Tax Quick Reference

International Tax Guidelines

U.S. Tax Guidelines

Canadian Tax Guidelines

EU Tax Guidelines

Warning Messages

## Currency

Manage currencies with more than two hundred

### Currency

Currency Configuration

Currency Symbols

Updating Currency Rates

## Attributes

Customer Attributes

Address Attributes

Address Templates

Product Attributes

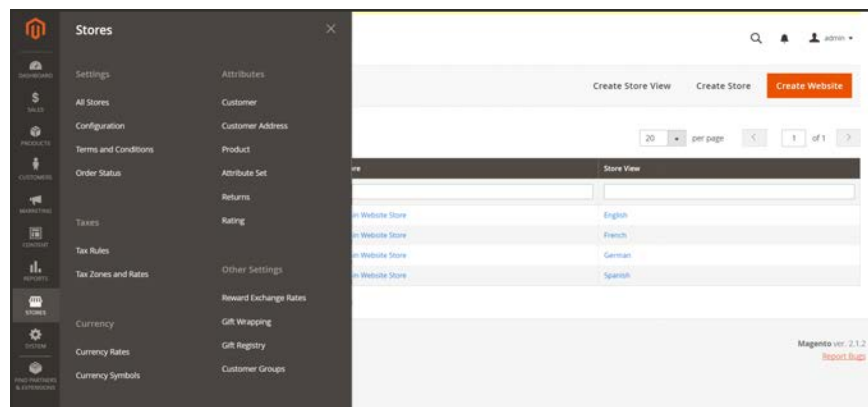
Creating an Attribute

Attribute Sets

## CHAPTER 81:

# Stores Menu

The Stores menu manages settings that are used less frequently, but referenced throughout your Magento installation, including setting up the store hierarchy, configuration, sales and order settings, tax and currency, product attributes, product review ratings, and customer groups.

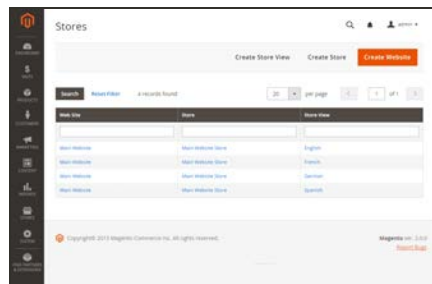


*Stores Menu*

## To display the Stores menu:

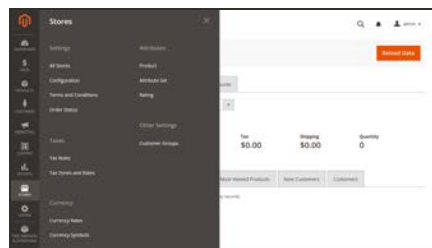
On the Admin sidebar, tap **Stores**.

## Menu Options



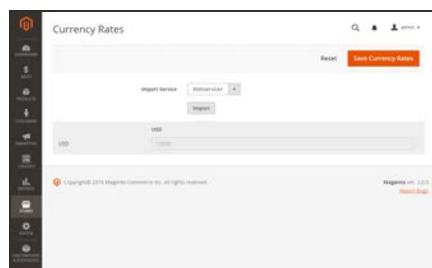
### All Stores

Manage the hierarchy of websites, stores and store views in your Magento installation, and all configuration settings. In addition, you can set up the Terms and Conditions of a sale, and manage order status settings.



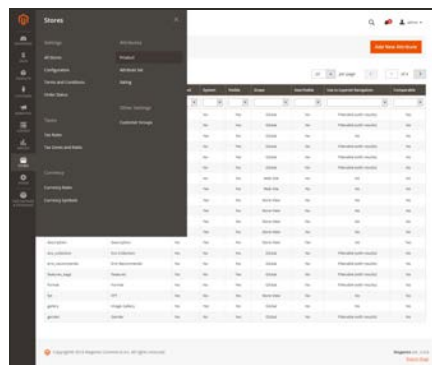
### Taxes

Set up the tax rules for your store, define customer and product tax classes, and manage tax zones and rates. You can also import tax rate data into your store.



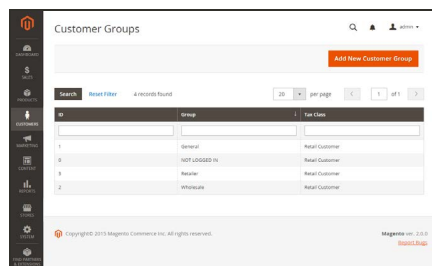
### Currency

Manage the rates for the currencies that are accepted as payment in your store, and customize the currency symbols that appear in product prices and sales documents.



### Attributes

Manage attributes that are used for customer and product information, returns, and product ratings. You can create new attributes, edit existing attributes, and manage attribute sets.



### Other Settings

Manage the settings for reward exchange rates, gift wrapping, gift registries, and the tax class that is assigned to each customer group.

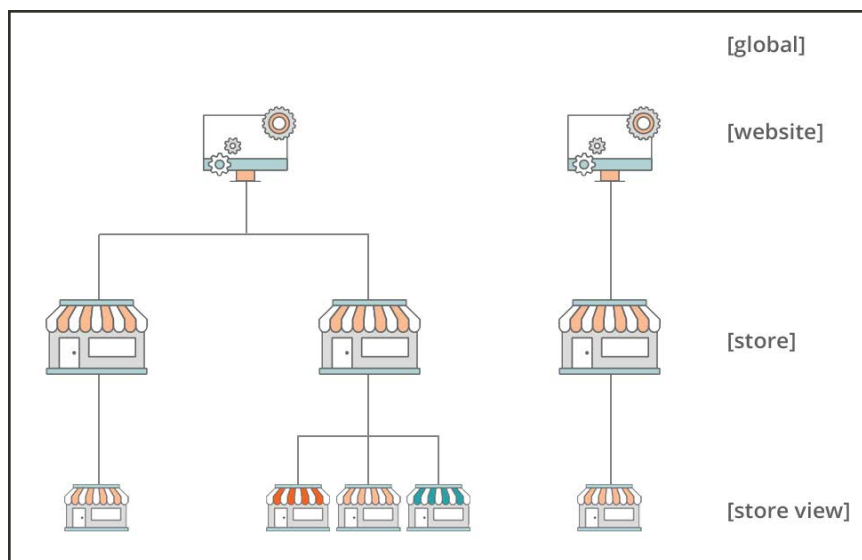


## CHAPTER 82:

# All Stores

When Magento Commerce is installed, a hierarchy that includes a main website, store, and store view is created. You can create additional websites, stores, and store views, as needed. For example, in addition to your main website, you might have a additional websites with a different domain. Within each website, you can have multiple stores, and within each store, separate store views. Many installations have one website and one store, but with multiple store views to support different languages.

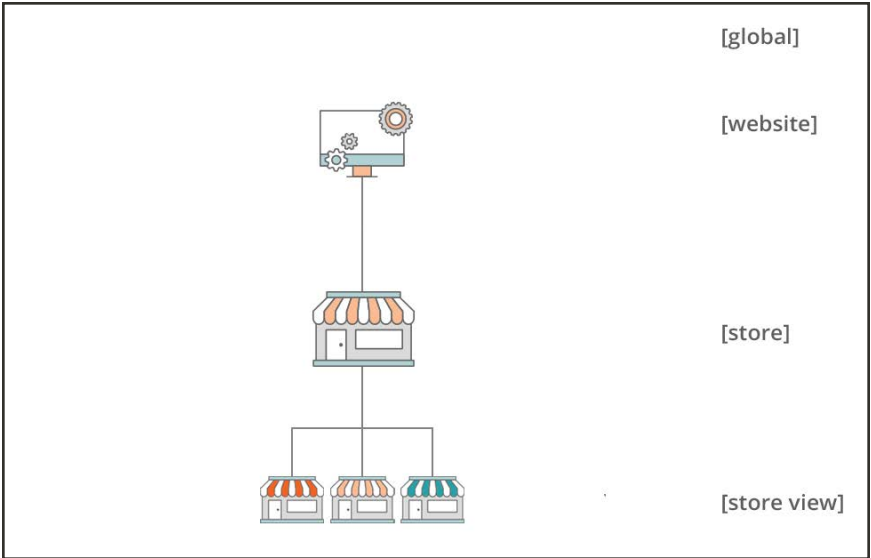
Before you begin, plan your store hierarchy in advance because it is referred to throughout the configuration. Each store can have a separate **root category**, which makes it possible to have an entirely different set of main menu options for each store.



*Store Hierarchy*

# Adding Store Views

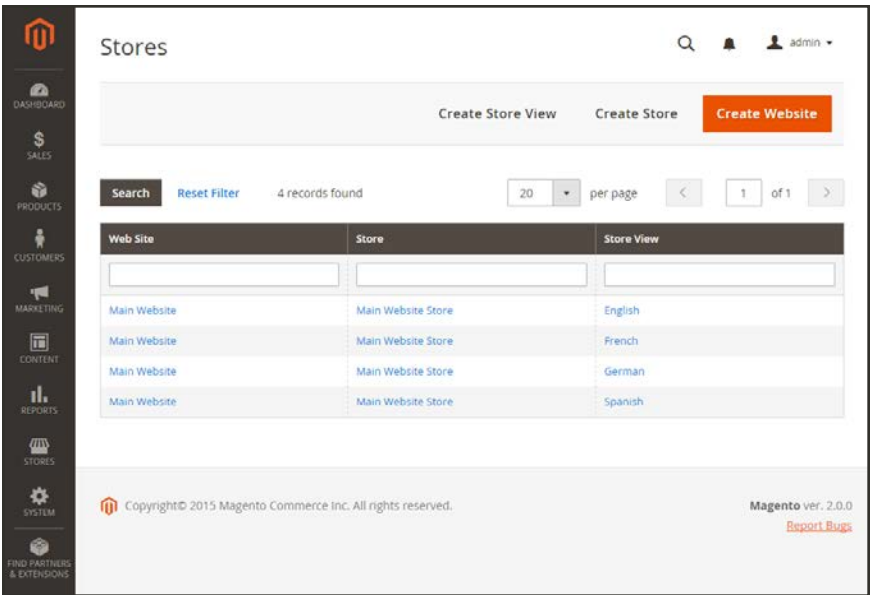
Store views are typically used to make the store available in different **locales**. Shoppers can use the language chooser in the header of the store to change the store view.



Multiple Store Views

## To create a new store view:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **All Stores**.



All Stores

2. Tap **Create Store View**. Then, do the following:

Store View Information

Store \*

Main Website Store ▼

Name \*

Code \*

Status \*

Disabled ▼

Sort Order

*Store View Information*

- a. Set **Store** to the parent store of this view.
  - b. Enter a **Name** for this store view. The name appears in the language chooser in the store header. For example: Spanish.
  - c. Enter a **Code** in lowercase characters to identify the view. For example: spanish.
  - d. To activate the view, set **Status** to “Enabled.”
  - e. (Optional) Enter a **Sort Order** number to determine the sequence in which this view is listed with other views.
3. When complete, tap **Save Store View**.

# Editing a Store View

Because the view name appears in the language chooser, you might eventually want to change the name of the default view to something more descriptive. The Name field is simply a label, and can be easily changed.

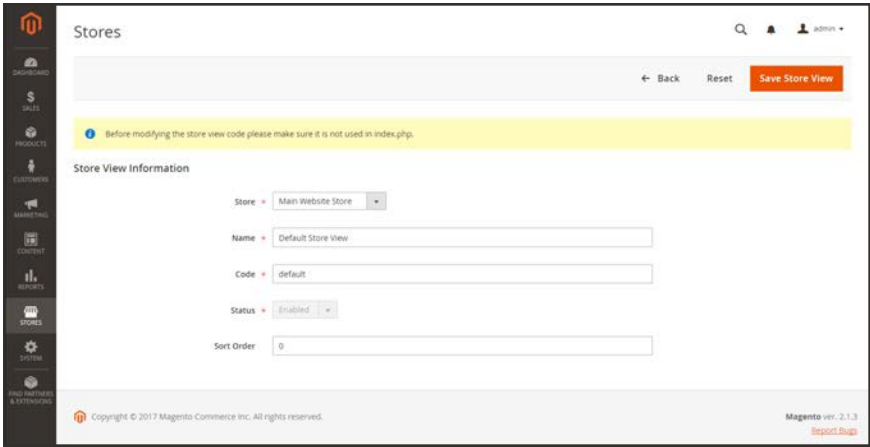
If your Magento installation has a multisite or multistore setup, do not change the store Code field without verifying that the value is not referenced in the `index.php` file. If you do not have access to the server to examine the file, ask a developer for help.

FIELD	ORIGINAL VALUE	UPDATED VALUE
Name	Default Store View	English
Code	default	english

## To edit a store view:

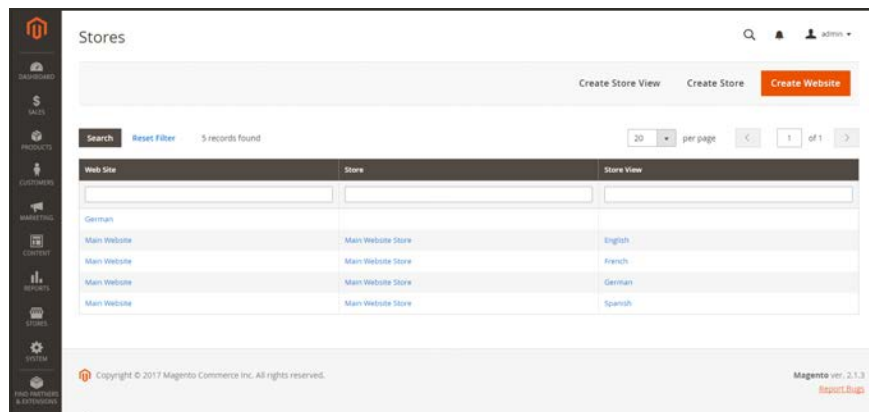
- 1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **All Stores**.
- 2. In the **Store View** column of the grid, click the name of the view that you want to edit.

When editing the default view, the Store and Status fields are not available.



*Editing the Default View*

3. Update the following fields as applicable:
  - Store (non-default views only)
  - Name
  - Code (only if not used in `index.php`)
  - Status (non-default views only)
  - Sort Order
4. When complete, tap **Save Store View**.

*Stores*

## Adding a Language

Most of the text that appears to be hard-coded on pages throughout your store can be instantly changed to a different language by changing the locale of the view. Changing the locale doesn't actually translate the text word-for-word, but simply references a different translation table that provides the interface text that is used throughout the store. The text that can be changed includes navigational titles, labels, buttons, and links such as "My Cart" and "My Account." You can also use the [Inline Translation](#) tool to touch up text in the interface.

Language packs can be found under "[Translations & Localization](#)" on Magento Marketplace. New extensions are continually added to Marketplace, so check back often!


### Step 1: Install a Language Pack

Follow the standard instructions to install the language pack extension from [Component Manager](#).

### Step 2: Create a Store View for the Language

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **All Stores**.
2. Tap **Create Store View**. Then, do the following:
  - a. Choose the **Store** that is the parent of the view.
  - b. Enter a **Name** for the store view. For example: Portuguese.  
In the header of the store, the name appears in the "language chooser."
  - c. Enter a **Code** in lowercase characters to identify the view. For example: portuguese.
  - d. To activate the view, set **Status** to "Enabled."
  - e. (Optional) Enter a **Sort Order** number to determine the sequence in which this view is listed with other views.
3. When complete, tap **Save Store View**.

### Step 3: Change the Locale of the Store View

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the upper-left corner, set **Store View** to the specific view where the configuration is to apply. When prompted to confirm scope switching, tap **OK**.
3. Expand  the **Locale Options** section.
4. Clear the **Use Website** checkbox after the Locale field. Then, set **Locale** to the language that you want to assign to the view.

If there are several variations of the language available, make sure to choose the one for the specific region or dialect.

5. When complete, tap **Save Config.**

After you change the language of the locale, the remaining content that you have created, including **product** names and descriptions, categories, **CMS** pages, and blocks must be translated separately for each store view.

## Translating Products

If your store has multiple views in different languages, the same products are available in each store view. You can use the same basic product information, such as SKU, price, and inventory level, regardless of language. Then, translate only the product name, description fields, and meta data as needed for each language.

### Process Overview:

Step 1: [Translate Product Fields](#)

Step 2: [Translate Field Labels](#)

Step 3: [Translate All Categories](#)

### Step 1: Translate Product Fields

1. On the Admin sidebar, tap **Products**. Then under Inventory, choose **Catalog**.
2. In the grid, find the product to be translated, and open in edit mode.
3. In the upper-left corner set **Store View** to the view for the translation. When prompted to confirm, tap **OK**.
4. For each field to be edited, do the following:
  - a. Clear the **Use Default Value** checkbox to the right of the field.
  - b. Either paste or type the translated text into the field.

Make sure to translate all text fields, including **image** labels and Alt text, Search Engine Optimization fields and any **Custom Options** information.

5. When complete, tap **Save**.

### Step 2: Translate Field Labels

1. On the Admin sidebar, tap **Stores**. Then under **Attributes**, choose **Product**.
2. In the list, find the attribute to be translated, and open in edit mode.
3. In the panel on the left, choose **Manage Labels**.
4. In the **Manage Titles** section, enter a translated label for each store view.



*Enter Translated Labels*

5. When complete, tap **Save Attribute**.

### Step 3: Translate All Categories

1. On the Admin sidebar, tap **Products**. Then under Inventory, choose **Categories**.
2. In the upper-left corner set **Store View** to the view for the translation. When prompted to confirm, tap **OK**.
3. In the tree, find the category to be translated and open in edit mode.
4. On the **General Information** tab, translate the following fields:
  - Name
  - Description
  - Page Title
  - Meta Keywords
  - Meta Description
5. To translate the **URL Key**, do the following:
  - a. Clear the **Use Default Value** checkbox to the right of the field.
  - b. Enter the translated text.
  - c. Make sure that the **Create Permanent Redirect for old URL** checkbox is selected

*Translate URL Key*

6. When complete, tap **Save Category**.
7. Repeat the process for all categories used in the store.

## Translating Content

If your store has multiple views in different **languages**, and you have set the locale for each view to a different language, the result is a partially translated site. The next step is to create a translated version of each page that is available from the specific store view. The Store View column of the Manage Pages list shows each view that has a translated version of the page.

To translate a content page, you must create a new page that has the same URL Key as the original, but is assigned to the specific store view. Then, update the page for the specific view with the translated text. The following example shows how to create a translated version of the “About Us” page for the Spanish store view.

### To create a translated page for a view:

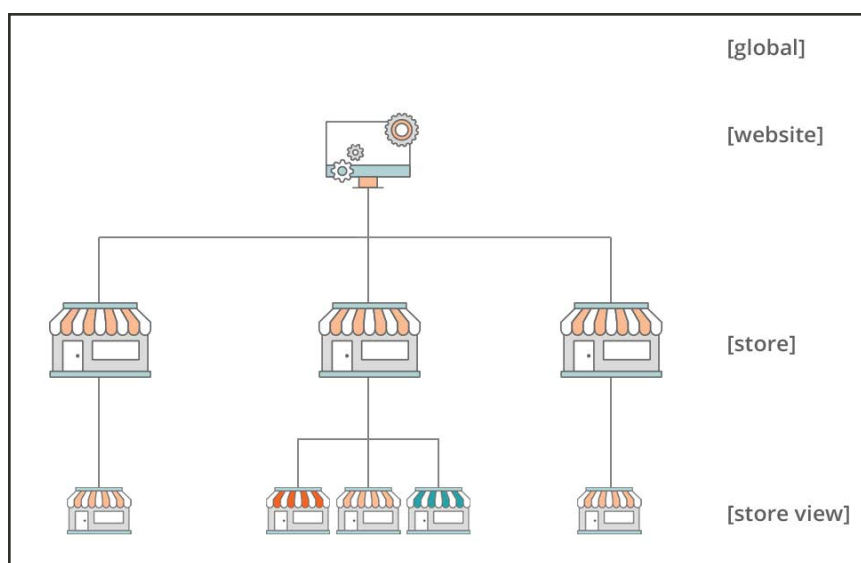
1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Pages**.
2. In the grid, find the page to be translated, and open in edit mode.
3. Copy the **URL Key** to the clipboard. Then, press the **Back** button to return to the Pages grid.
4. Tap **Add New Page**. Then, do the following:
  - a. Enter the translated **Page Title**.
  - b. Paste the **URL Key** that you copied from the original page.
  - c. In the **Store View** box, choose the store view where the page is to be available.
  - d. In the panel on the left, choose **Content**. Then, complete the translated text for the page.
  - e. On the **Design** tab, set the column **Layout** of the page.
  - f. On the **Meta Data** tab, enter the translated text for the **Keywords** and **Description**.
5. When complete, tap **Save Page**. Then when prompted, refresh any invalid **caches**.
6. To verify the translation, go to the storefront and use the language chooser to change the store view.

Notice that there are still some elements on the page that need to be translated, including the company footer links **block**, the **welcome message**, and **product information**.

## Adding Stores

A single installation of Magento can have multiple stores that share the same Admin. Stores that are under the same website have the same IP address and domain, use the same security certificate, and share a single checkout process.

The important thing to understand is that the stores use the same Magento code, and share the same Admin. Each store can have a separate catalog, or share the same catalog. Each store can have a separate **root category**, which makes it possible to have a different main menu for each store. Stores can have different branding, presentation, and content. Before you begin, take some time to plan your store hierarchy with future growth in mind, because it is used throughout the configuration.



*Multiple Stores*

Here are some examples of how URLs can be configured for multiple stores:

yourdomain.com/store1    Each store has a different path, but shares the same domain.  
yourdomain.com/store2

store1.yourdomain.com    Each store has a different subdomain of the primary domain.  
store2.yourdomain.com

### Process Overview:

- Step 1: Choose the Store Domain
- Step 2: Create the New Store
- Step 3: Create a Default Store View
- Step 4: Configure the Store URL

Step 1: Choose the Store Domain

The first step is to choose how you want to position the store. Will the stores share the same domain, each have a subdomain, or have distinctly different domains? For each store, do one of the following:

- To place the store one level below the primary domain, you don't have to do anything.
- Set up a subdomain of your primary domain.
- Set up a different primary domain.

Step 2: Create the New Store

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **All Stores**.
2. Tap **Create Store**. Then, do the following:
  - a. Choose the **Web Site** that is to be the parent of the new store. If the installation has only one web site, accept the default, "Main Website."
  - b. Enter a **Name** for the new store. The name is for internal reference only.
  - c. Set **Root Category** to the **root category** that defines the category structure for the main menu of the new store. If you have already created a specific root category for the store, select it. Otherwise, select "Default Category." You can come back later and update the setting.

Store Information

Web Site \*

Main Website

Name \*

Root Category \*

-- Please Select a Category --

Store Information

3. When complete, tap **Save Store**.

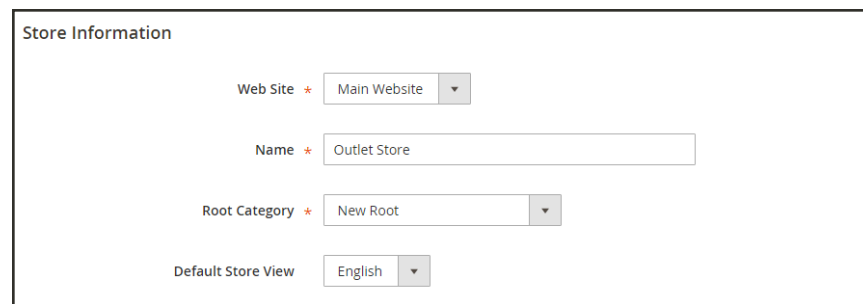
Web Site	Store	Store View
Main Website	Main Website Store	English
Main Website	Main Website Store	French
Main Website	Main Website Store	German
Main Website	Main Website Store	Spanish
Main Website	Outlet Store	

New Store

### Step 3: Create a Default Store View

1. Tap **Create Store View**. Then, do the following:
  - a. Set **Store** to the new store you created.
  - b. Enter a **Name** for the view. For example, "English."
  - c. Enter a **Code** for the view in lowercase characters.
  - d. Set **Status** to "Enabled."
  - e. In the **Sort Order** field, enter a number to determine the store's position when listed with other stores.
2. Tap **Save Store View**.

If you were to open your store in edit mode, you would see that it now has a default view.



Store Information

Web Site \* Main Website ▼

Name \* Outlet Store

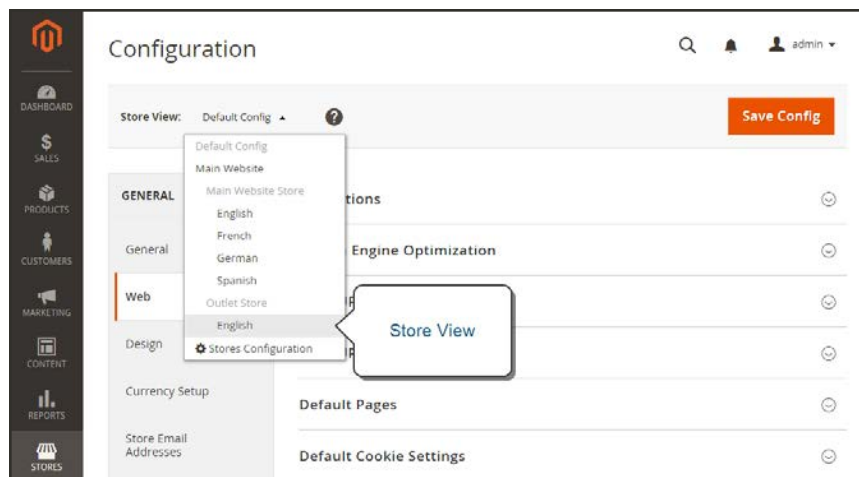
Root Category \* New Root ▼

Default Store View English ▼


*New Store with Default View*

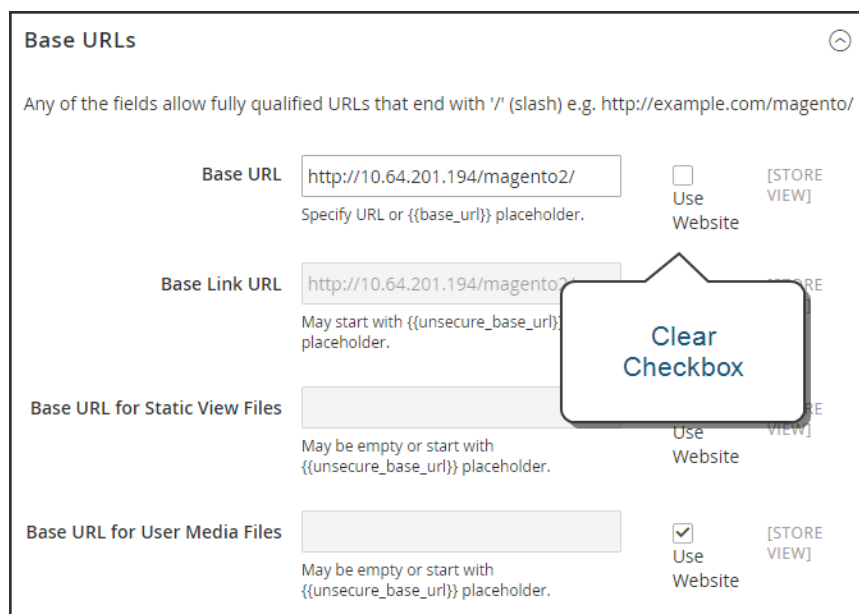
### Step 4: Configure the Store URL

1. On the menu bar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Web**.
3. In the upper-left corner, set **Store View** to the view that you created for the new store. When prompted to confirm **scope** switching, tap **OK**.




*Choose the New Store View*

4. Expand  the **Base URLs** section. Then, do the following:
  - a. After the Base URL field, clear the **Use Website** checkbox.
  - b. Enter the **Base URL** for the store.

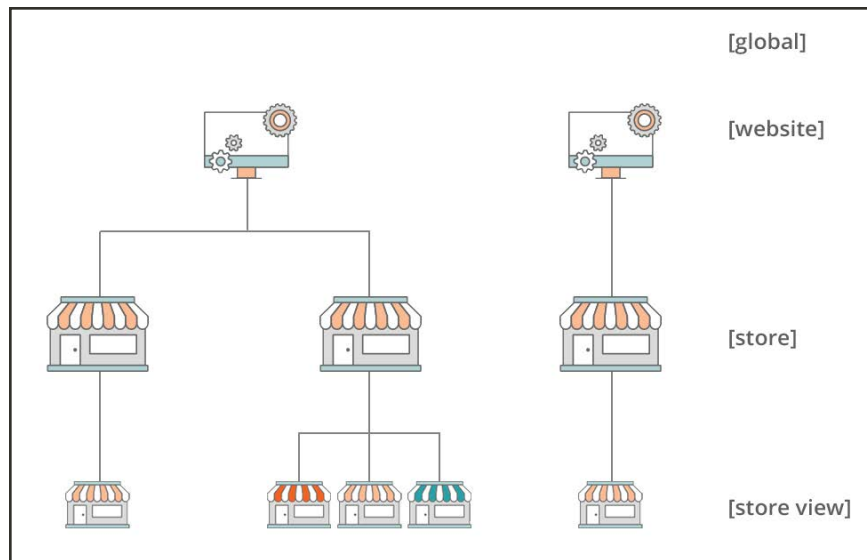


*Base URLs*

5. Expand  the **Secure Base URLs** section, and repeat the previous step as needed to configure the store's **secure URL**.
6. When complete, tap **Save Config.**

## Adding Websites

Multiple websites can be set up that use the same Magento installation. The websites can be set up to use the same domain, or different domains. If you want each store to have a dedicated checkout process under its own domain, each store must have a distinct IP address and separate security certificate.



*Multiple Websites*

### Step 1: Create a New Website

1. On the Admin sidebar, tap **Stores**. Then under Settings, choose **All Stores**.
2. Tap **Create Website**. Then, do the following:

Web Site Information

Name \*

Code \*

Sort Order

Set as Default

☐

*Website Information*

- a. In the **Name** field, enter the domain of the new website. For example, “domain.com.”
  - b. Enter a **Code** that will be used on the server to point to the domain.  
The code must begin with a lowercase (a-z) letter, and can include any combination of letters (a-z), numbers (0-9), and the underscore ( \_ ) symbol.
  - c. (Optional) Enter a **Sort Order** number to determine the sequence in which this site is listed with other sites. Enter a zero to make this site appear at the top of the list.
  - d. To make this the default website for your Magento installation, mark the **Set as Default** checkbox.
3. When complete, tap **Save Website**.
  4. Set up each **store** and **store view** that is needed for the new website.

### Step 2: Configure the Store URL

Follow the instructions to configure the **store URLs**.



## Store URLs

Each website in a Magento installation has a base URL that is assigned to the storefront, and another URL that is assigned to the Admin. Magento uses variables to define internal links in relation to the base URL, which makes it possible to move an entire store from one location to another without updating the links. Standard base URLs begin with `http`, and secure base URLs begin with `https`.

Base URL	<code>http://www.yourdomain.com/magento/</code>
Secure Base URL	<code>https://www.yourdomain.com/magento/</code>
URL with IP address	<code>http://###.###.###.###/magento/</code> <code>https://###.###.###.###/magento/</code>

**Important!** Do not change the Admin URL from the default Base URL configuration. To change the Admin URL or path, see: [Using a Custom Admin URL](#).

## Use Secure Protocol


The base URLs for your store were initially set up during the Web Configuration step of the [Magento installation](#). If a security certificate was available at the time, you could specify for secure (`https`) URLs to be used for the store, Admin, or both. If your Magento installation includes multiple stores, or if you plan to later add more stores, you can include the store code in the URL. All Magento resources and operations can be used with secure protocol.

If a security certificate wasn't available for the domain at the time of the installation, make sure to update the configuration before launching your store. After a security certificate is established for your domain, you can configure either or both base URLs to operate with encrypted Secure Sockets Layer (SSL) and [Transport Layer Security](#) (TLS) protocol.

Magento strongly recommends for all pages of a production site, including content and product pages, to be transmitted with secure protocol.

Magento can be configured to deliver all pages over `https` by default. If your store has been running up until now with standard protocol, you can improve security by enabling [HTTP Strict Transport Security](#) (HSTS). and by upgrading any insecure page requests that are received by the store. HSTS is an opt-in protocol that prevents browsers from rendering standard `http` pages that are transmitted with unsecure protocol for the specified domain. Because search engines might have already indexed each page of your store with standard `http` URLs, you can configure Magento to automatically upgrade any unsecure page requests to `https`, so you don't lose any traffic. When Magento is configured to use secure URLs for both the store and Admin, two additional fields appear that allow you to enable HSTS.

## To configure the base URL:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **General**, choose **Web**.
3. Expand  the **Base URL** section, and do the following:
  - a. Enter the fully qualified **Base URL** for your store. Make sure to end the URL with a forward slash, so it can be extended with additional URL Keys from your store. For example:

```
http://yourdomain.com/
```

Do not change the placeholder in the **Base Link URL** field. It is a placeholder that is used to create relative links to the base URL.

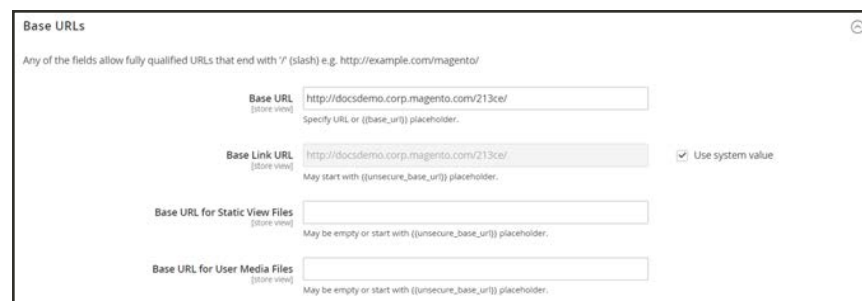
- b. (Optional) To specify an alternate location for the **Base URL for Static View Files**, enter the path starting with the following placeholder:

```
{{unsecure_base_url}}
```

- c. (Optional) To specify an alternate location for the **Base URL for User Media Files**, enter the path starting with the following placeholder:

```
{{unsecure_base_url}}
```

For a typical installation, there is no need to update the paths for the static view files or media files because they are relative to the base URL.



### Base URLs

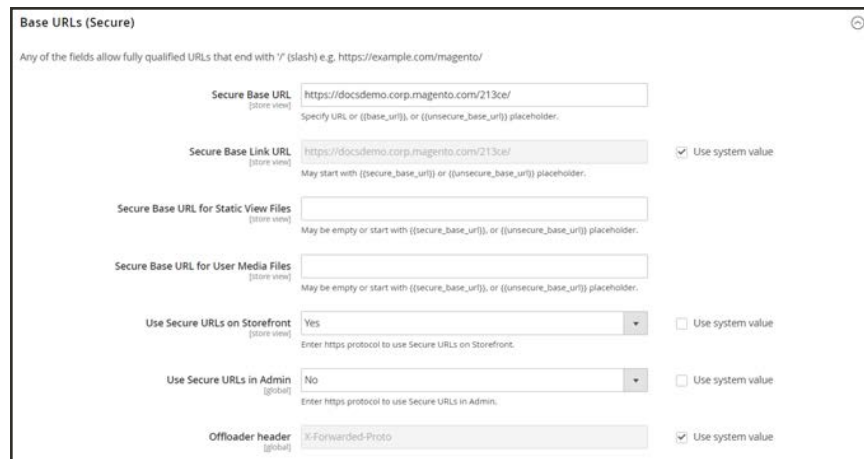
Placeholders enclosed in double braces are markup tags for variables.

4. When complete, tap **Save Config**.

## To configure the secure base URL:

If your domain has a valid security certificate, you can configure the URLs of both the storefront and Admin to transmit data over a secure (https) channel. Without a valid security certificate, your store cannot operate with secure (SSL/TLS) protocol.

1. Expand  the **Base URLs (Secure)** section. Then, do the following:



### *Base URLs (Secure)*

- a. Enter the full **Secure Base URL**, followed by a forward slash. For example:

```
https://yourdomain.com/
```

- b. Do not change the placeholder in the **Secure Base Link URL** field. It is used to create relative links to the secure base URL.
- c. (Optional) To specify an alternate location for the **Secure Base URL for Static View Files**, enter the path starting with the following placeholder:

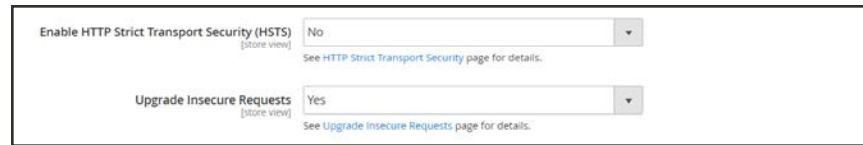
```
{{secure_base_url}}
```

- d. (Optional) To specify an alternate location for the **Secure Base URL for User Media Files**, enter the path starting with the following placeholder:

```
{{secure_base_url}}
```

2. To enhance security, set both of the following options to "Yes."
  - Use Secure URLs on Storefront
  - Use Secure URLs in Admin

When the following additional fields appear , do the following:




The screenshot shows a configuration interface with two settings. The first setting is 'Enable HTTP Strict Transport Security (HSTS)' with a dropdown menu set to 'No'. Below it is a link that says 'See HTTP Strict Transport Security page for details.' The second setting is 'Upgrade Insecure Requests' with a dropdown menu set to 'Yes'. Below it is a link that says 'See Upgrade Insecure Requests page for details.'

*Enhanced Security Settings*

- a. If you want your store to display only secure https page requests, set **Enable HTTP Strict Transport Security (HSTS)** to "Yes."
  - b. To upgrade any requests for standard unsecured http pages to secure https, set **Upgrade Insecure Requests** to "Yes."
3. When complete, tap **Save Config**.

### To include the store code in URLs:

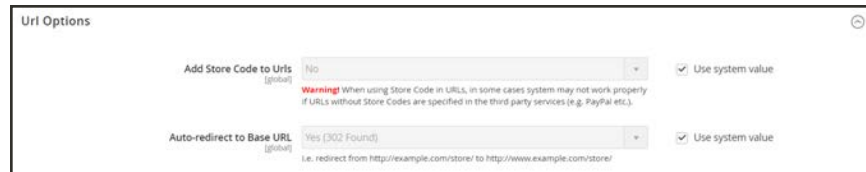
1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **General**, choose **Web**.
3. Expand  the **URL Options** section.
4. Set **Add Store Code** to your preference.

#### URL with Store Code

```
http://www.yourdomain.com/magento/[store-code]/index.php/url-identifier
```

#### URL without Store Code

```
http://www.yourdomain.com/magento/index.php/url-identifier
```



### URL Options

5. When complete, tap **Save Config**.
6. After the setting is saved, you will be prompted to refresh the cache. Tap the **Cache Management** link in the message at the top of the workspace. Then, follow the instructions to refresh the cache.



*Refresh Cache*

## Using a Custom Admin URL

As a **security best practice**, Magento recommends that you use a unique, custom Admin URL instead of the default “admin” or a common term such as “backend”. Although it will not directly protect your site from a determined bad actor, it can reduce exposure to scripts that try to gain unauthorized access.

Check with your hosting provider before implementing a custom Admin URL. Some hosting providers require a standard URL to meet firewall protection rules.

In a typical Magento installation, the Admin URL and path is immediately below the Magento base URL. The path to the store Admin is one directory below the root.

### Default Base URL

```
http://yourdomain.com/magento/
```


### Default Admin URL and Path

```
http://yourdomain.com/magento/admin
```

Although it is possible to change the Admin URL and path to another location, any mistake removes access to the Admin, and must be corrected from the server.

As a precaution, do not try to change the Admin URL by yourself unless you know how to edit configuration files on the server.

### Method 1: Change from the Magento Admin

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Advanced**, choose **Admin**.
3. Expand  the **Admin Base URL** section. Then, do the following:
  - a. Clear the first **Use system value** checkbox. Then, set **Use Custom Admin URL** to “Yes”.
  - b. Clear the next **Use system value** checkbox. Then, enter the **Custom Admin URL** in the following format:

```
http://yourdomain.com/magento/
```

**Important!** The Admin URL must be in the same Magento installation, and have the same document root as the storefront.

- c. Clear the next **Use system value** checkbox. Then, set **Custom Admin Path** to “Yes”.

- d. Clear the next **Use system value** checkbox. Then, enter the **Custom Admin Path**.

The path that you enter is appended to the Custom Admin URL after the last forward slash.

sample\_custom\_admin

Admin Base URL

Use Custom Admin URL [global] Yes ☐ Use system value

Custom Admin URL [global]  ☐ Use system value

Make sure that base URL ends with '/' (slash), e.g., http://yourdomain/magento/

Use Custom Admin Path [global] Yes ☐ Use system value

Custom Admin Path [global]  ☐ Use system value

You will have to sign in after you save your custom admin path.

*Admin Base URL*

- When complete, tap **Save Config**.
- After the changes are saved, **Sign Out** of the Admin. Then, log back in using the new Admin URL and path.

## Method 2: Change from the Server Command Line

- Open the `app/etc/env.php` file in a text editor, and change the name of the `[admin]` path. Make sure to use only lowercase characters. Then, save the file.

On the server, the admin path is located in the `app/etc/env.php` file. Look for the `<adminhtml>` argument in the `<admin>` section:

### Default Admin Path

```
# <frontName><![CDATA[admin]]></frontName>
```

### New Admin Path

```
# <frontName><![CDATA[backend]]></frontName>
```

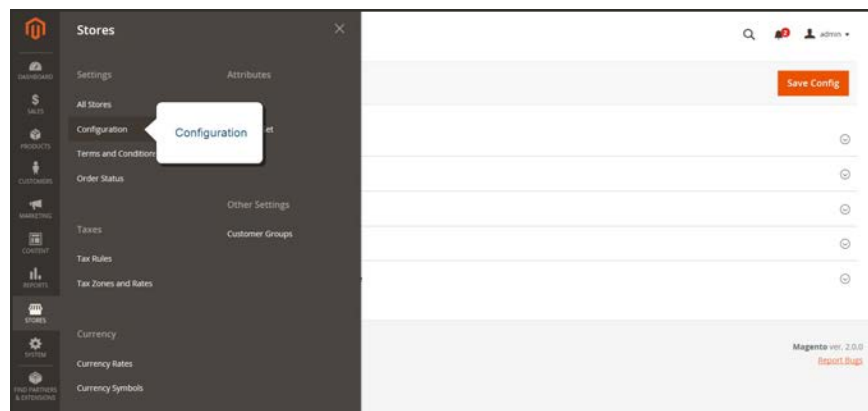
- Use one of the following methods to clear the Magento cache:
  - On the Admin sidebar, tap **System**. Under **Tools**, choose **Cache Management**. Then, tap **Flush Magento Cache**.
  - On the server, navigate to the `var/cache` folder, and delete the contents of the cache folder.



## CHAPTER 83:

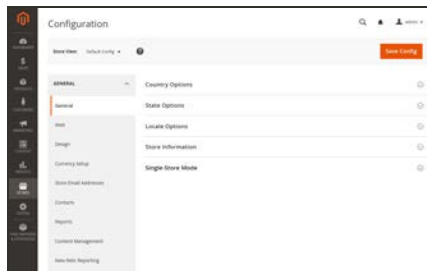
# Configuration

The online [Configuration Reference](#) has field descriptions for every configuration setting in Magento Commerce. To learn how to apply configuration settings to specific store views, see: [Scope](#).



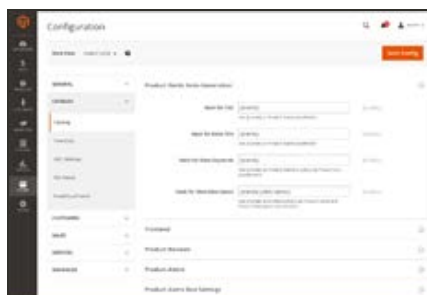
*Configuration*

## Configuration Tabs



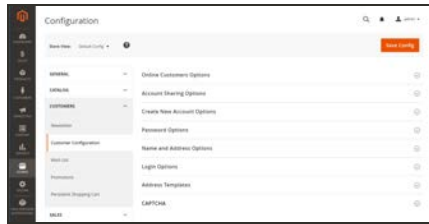
### General

Includes basic configuration settings for the store, URLs, theme, currency, email addresses, store contacts, editor, and dashboard reports.



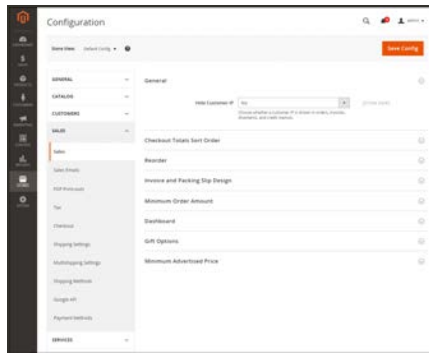
### Catalog

Determines product and inventory settings, controls sitemap and RSS feed generation, and specifies the email template that is used to share products with friends.



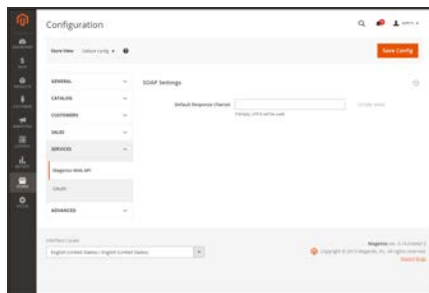
## Customers

Establishes basic customer account and login options, newsletter settings, ,wish list, and the format of auto-generated coupon codes.



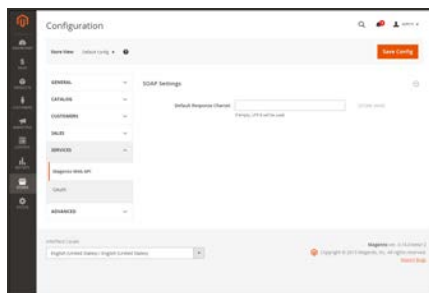
## Sales

Determines checkout and tax settings, payment and shipping options, sales email and PDF print-outs, and Google API settings.



## Services

Configures Magento API settings, including SOAP and OAuth.



## Advanced

Determines default Admin settings, various system configuration settings, advanced module controls, and developer tools.

## CHAPTER 84:

# Taxes

In this section of the guide, you will learn how to set up taxes according to the requirements of your locale. You can set up tax classes for products and customer groups, and create tax rules that combine product and customer classes, tax zones, and rates. In addition, you'll learn more advanced topics such as setting up fixed product taxes, compound taxes, and displaying consistent prices across international borders. If you are required to collect a value-added tax, you will learn how to set up your store to automatically calculate the appropriate amount with validation.

Magento provides a variety of options to define taxes. Tax classes are used to define “tax rules.” Tax rules are a combination of a Product Class, a Customer Class and a Tax Zone and Rate. Magento also supports the calculation of Value-Added Tax (VAT) for business-to-business transactions in the European Union.

## General Tax Settings

The following instructions take you through the basic tax configuration for your Magento installation. Before setting up your taxes, make sure that you are familiar with the tax requirements of your **locale**. Then, complete the tax configuration according to your requirements.

Admin **permissions** can be set to restrict access to **tax resources**, based on the business “need to know.” To create an Admin role with access to tax settings, choose both the Sales/Tax and System/Tax resources. If setting up a website for a region that differs from your default shipping point of origin, you must also allow access to the System/Shipping resources for the role. The shipping settings determine the store tax rate that is used for catalog prices.

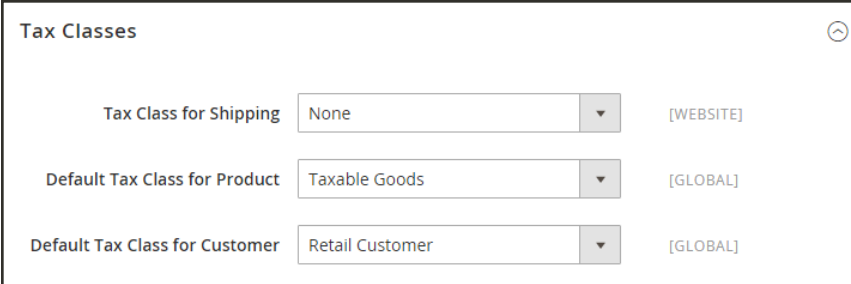
### To configure the general tax settings:

1. On the Admin sidebar, choose **Stores**. Then under Settings, choose **Configuration**.
2. For a multisite configuration, set **Store View** to the website and store that is the target of the configuration.
3. Complete the following configuration settings. If necessary, clear the **Use System value** checkbox of any settings that are grayed out.

### Tax Classes

1. In the panel on the left under **Sales**, choose **Tax**.

2. Expand ☹ the **Tax Classes** section. Then, do the following:



### *Tax Classes*

- a. Set **Tax Class for Shipping** to the appropriate class. The default classes are:
    - None
    - Taxable Goods
  - b. Set **Tax Class for Gift Options** to the appropriate class. The default classes are:
    - None
    - Taxable Goods
  - c. Set **Default Tax Class for Product** to the appropriate class. The default classes are:
    - None
    - Taxable Goods
  - d. Set **Default Tax Class for Customer** to the appropriate class. The default class is:
    - Retail Customer
    - Wholesale Customer
3. When complete, tap **Save Config**.

## Calculation Settings

1. Expand the **Calculation Settings** section. Then, do the following:

Calculation Settings

Tax Calculation Method Based On

Total

[WEBSITE]

Tax Calculation Based On

Shipping Address

[WEBSITE]

Catalog Prices

Excluding Tax

[WEBSITE]

This sets whether catalog prices entered from Magento Admin include tax.

Shipping Prices

Excluding Tax

[WEBSITE]

This sets whether shipping amounts entered from Magento Admin or obtained from gateways include tax.

Apply Customer Tax

After Discount

[WEBSITE]

Apply Discount On Prices

Excluding Tax

[WEBSITE]

Apply discount on price including tax is calculated based on store tax if "Apply Tax after Discount" is selected.

Apply Tax On

Custom price if available

[WEBSITE]

Enable Cross Border Trade

No

[WEBSITE]

When catalog price includes tax, enable this setting to fix the price no matter what the customer's tax rate.

### Calculation Settings

- a. Set **Tax Calculation Method Based On** to one of the following:

Unit Price	The price of each product.
Row Total	The total of the line item in the order, less discounts.
Total	The order total

- b. Set **Tax Calculation Based On** to one of the following:

Shipping Address	The address where the order is to be shipped.
Billing Address	The billing address of the customer or company.
Shipping Origin	The address that is specified as the <b>point of origin</b> for your store.

- c. Set **Catalog Prices** to one of the following:

- Excluding Tax
- Including Tax

- d. Set **Shipping Prices** to one of the following:

- Excluding Tax
  - Including Tax
- e. Set **Apply Customer Tax** to one of the following to determine whether tax is applied to the original or discounted price.
- After Discount
  - Before Discount
- f. Set **Apply Discount on Prices** to one of the following to determine if discounts include or exclude tax.
- Excluding Tax
  - Including Tax
- g. Set **Apply Tax On** to one of the following:
- Custom price if available
  - Original price only
- h. Set **Enable Cross-Border Trade** to one of the following:
- Yes      Use consistent pricing across different tax rates. If the catalog price includes tax, choose this setting to fix the price regardless of the customer's tax rate.
- No        Vary the price by tax rate.

**Important!** If **cross-border trade** is enabled, the profit margin changes by tax rate. Profit is determined by the formula (Revenue - CustomerVAT - CostOfGoodsSold). To enable cross-border trade, prices must be set to include tax.

2. Expand ☏ the **Default Tax Destination Calculation** section. Then, specify the country that is to be the default for tax calculations.

**Default Tax Destination Calculation** ☏

Default Country	<input type="text" value="United States"/>	▼	[STORE VIEW]
Default State	<input type="text" value="*"/>	▼	[STORE VIEW]
Default Post Code	<input type="text"/>		[STORE VIEW]

*Default Tax Destination Calculation*

3. When complete, tap **Save Config.**

## Price Display Settings

**Important!** Some combinations of settings related to a price display that both includes and excludes tax can be confusing to the customer. To avoid triggering a warning message, see the [recommended settings](#).

1. Expand ☺ the **Price Display Settings** section. Then, do the following:

The screenshot shows the 'Price Display Settings' section. It contains two rows of settings. The first row is 'Display Product Prices In Catalog' with a dropdown menu set to 'Excluding Tax' and a '[STORE VIEW]' link. The second row is 'Display Shipping Prices' with a dropdown menu set to 'Excluding Tax' and a '[STORE VIEW]' link. A collapse icon (☺) is in the top right corner of the section.

### *Price Display Settings*

- a. Set **Display Product Prices in Catalog** to one of the following:

Excluding Tax	Catalog prices that appear in the storefront do not include tax.
Including Tax	Catalog prices in the storefront include tax only if a tax rule matches the tax origin, or if the customer's address matches the tax rule. This might happen after a customer creates an account, logs in, or uses the Estimate Tax and Shipping tool in the cart.
Including and Excluding Tax	Catalog prices that appear in the storefront are displayed both with, and without tax.

- b. Set **Display Shipping Prices** to one of the following:

- Excluding Tax
- Including Tax
- Including and Excluding Tax

2. Expand ☺ the **Shopping Cart Display Settings** section.

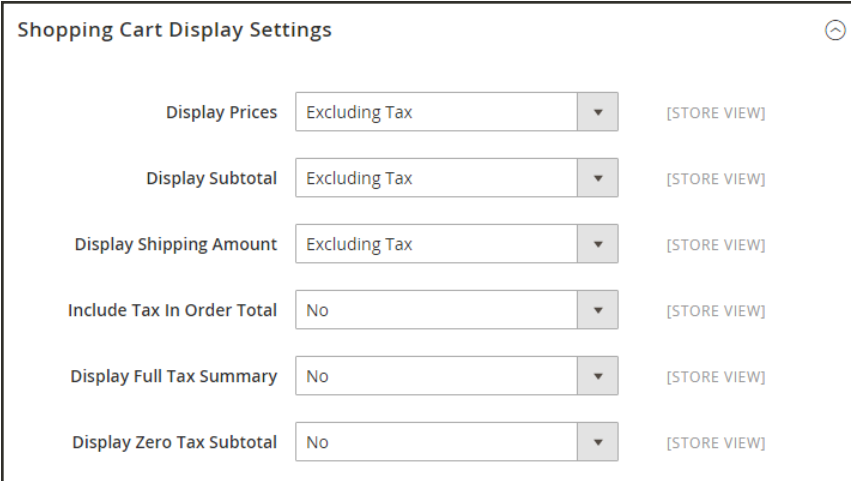
For each of the following settings, choose how you want taxes and prices to appear in the cart, according to the requirements of your store and locale.

- a. Set **Display Prices** to one of the following:

- Excluding Tax
- Including Tax
- Including and Excluding Tax

- b. Set **Display Subtotal** to one of the following:

- Excluding Tax
  - Including Tax
  - Including and Excluding Tax
- c. Set **Display Shipping Amount** to one of the following:
- Excluding Tax
  - Including Tax
  - Including and Excluding Tax
- d. Set the following to either “Yes” or “No,” according to your needs:
- Include Tax in Order Total
  - Display Full Tax Summary
  - Display Zero Tax Subtotal



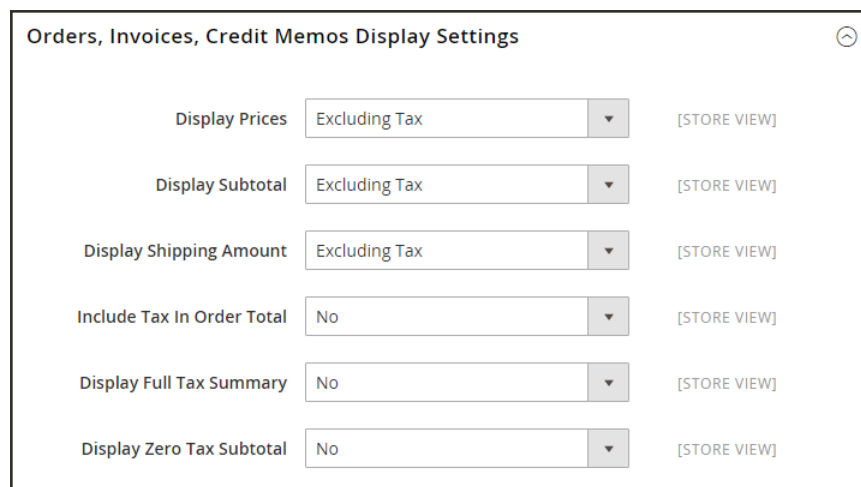
Shopping Cart Display Settings		
Display Prices	Excluding Tax	[STORE VIEW]
Display Subtotal	Excluding Tax	[STORE VIEW]
Display Shipping Amount	Excluding Tax	[STORE VIEW]
Include Tax In Order Total	No	[STORE VIEW]
Display Full Tax Summary	No	[STORE VIEW]
Display Zero Tax Subtotal	No	[STORE VIEW]

### *Shopping Cart Display Settings*

3. Expand ☺ the **Orders, Invoices, Credit Memos Display Settings** section. Then, do the following to specify how prices and taxes appear in orders, invoices, and credit memos.
- a. Set **Display Prices** to one of the following.
- Excluding Tax
  - Including Tax
  - Including and Excluding Tax
- b. Set **Display Subtotal** to one of the following:
- Excluding Tax
  - Including Tax
  - Including and Excluding Tax



- c. Set **Display Shipping Amount** to one of the following:
- Excluding Tax
  - Including Tax
  - Including and Excluding Tax
- d. Set the following to “Yes” or “No,” according to your requirements:
- Include Tax in Order Total
  - Display Full Tax Summary
  - Display Zero Tax Subtotal



Orders, Invoices, Credit Memos Display Settings		
Display Prices	Excluding Tax	[STORE VIEW]
Display Subtotal	Excluding Tax	[STORE VIEW]
Display Shipping Amount	Excluding Tax	[STORE VIEW]
Include Tax In Order Total	No	[STORE VIEW]
Display Full Tax Summary	No	[STORE VIEW]
Display Zero Tax Subtotal	No	[STORE VIEW]

*Orders, Invoices, Credit Memos Display Settings*

4. When complete, tap **Save Config.**


## Cross Border Price Consistency

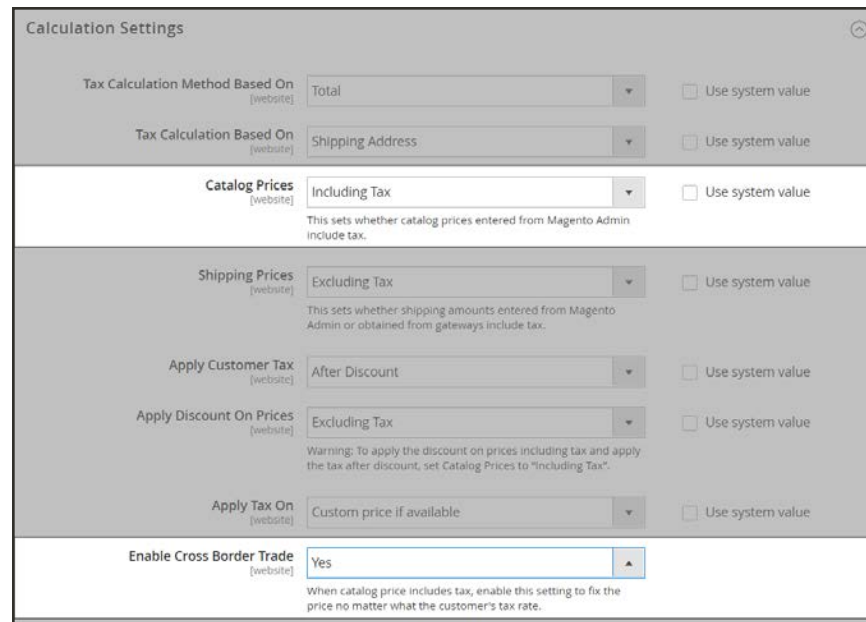
Cross-border trade (also referred to as price consistency) supports European Union (EU) and other merchants who want to maintain consistent prices for customers whose tax rates are different than the store tax rate.

Merchants operating across regions and geographies can show their customers a single price by including the tax in the price of the product. Pricing is clean and uncluttered regardless of tax structures and rates that vary from country to country.

**Important!** When cross-border trade is enabled, your profit margin changes by tax rate. Profit is determined by the formula:  $(\text{Revenue} - \text{CustomerVAT} - \text{CostOfGoodsSold})$ .

### To enable cross-border price consistency:

1. On the Admin sidebar, choose **Stores**. Then under Settings, choose **Configuration**.
2. For a multisite configuration, set **Store View** to the website and store that is the target of the configuration.
3. In the panel on the left, under **Sales**, choose **Tax**.
4. Expand  the **Calculation Settings** section. Then, do the following:



**Calculation Settings**

Tax Calculation Method Based On [website] Total ☐ Use system value

Tax Calculation Based On [website] Shipping Address ☐ Use system value

Catalog Prices [website] Including Tax ☐ Use system value  
This sets whether catalog prices entered from Magento Admin include tax.

Shipping Prices [website] Excluding Tax ☐ Use system value  
This sets whether shipping amounts entered from Magento Admin or obtained from gateways include tax.

Apply Customer Tax [website] After Discount ☐ Use system value

Apply Discount On Prices [website] Excluding Tax ☐ Use system value  
Warning: To apply the discount on prices including tax and apply the tax after discount, set Catalog Prices to "Including Tax".

Apply Tax On [website] Custom price if available ☐ Use system value

Enable Cross Border Trade [website] Yes ☐ Use system value  
When catalog price includes tax, enable this setting to fix the price no matter what the customer's tax rate.

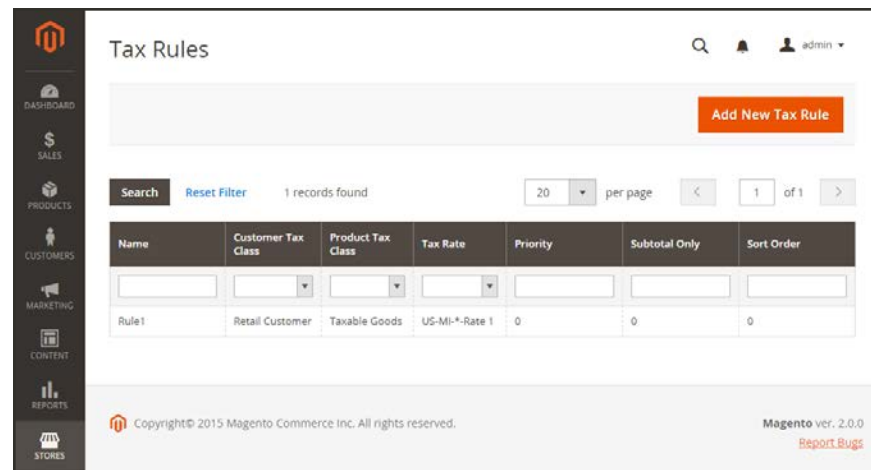
#### Calculation Settings

- a. Set **Catalog Prices** to "Including Tax."
  - b. To enable cross-border price consistency, set **Enable Cross Border Trade** to "Yes."
5. When complete, tap **Save Config**.

## Tax Rules

Tax rules incorporate a combination of product class, customer class and tax rate. Each customer is assigned to a customer class, and each product is assigned a product class. Magento analyzes the shopping cart of each customer and calculates the appropriate tax according to the customer and product classes, and the region (based on the customer's shipping address, billing address or shipping origin).

When numerous taxes must be defined, you can simplify the process by importing them.



*Tax Rules*

### Step 1: Complete the Tax Rule Information

1. On the Admin sidebar, tap **Stores**. Then under **Taxes**, choose **Tax Rules**.
2. In the upper-right corner, tap **Add New Tax Rule**.
3. Under Tax Rule Information, enter a **Name** for the new rule.
4. Choose the **Tax Rate** that applies to the rule. If you need to edit an existing tax rate, do the following:
  - a. Hover over the tax rate, and tap the **Edit** icon.
  - b. Update the form as needed, and tap **Save**.

Tax Rule Information

Name \*

Tax Rate \*

US-CA-\* - Rate 1

US-NY-\* - Rate 1

US-MI-\* - Rate 1

Add New Tax Rate

*Tax Rule Information*

To enter tax rates, use either of the following methods:

**Method 1: Enter Tax Rates Manually**

- 1. Tap **Add New Tax Rate**.
- 2. Complete the form as needed. For more information, see: [Tax Zones and Rates](#).
- 3. When complete, tap **Save**.

Tax Rate

Save

Tax Identifier \*

Zip/Post is Range

☐

Zip/Post Code

\*\*1 - matches any; 'xyz\*' - matches any that begins on 'xyz' and are not longer than 10.

State

\* ▾

Country \*

United States ▾

Rate Percent \*

*New Tax Rate*

## Method 2: Import Tax Rates

1. Scroll down to the section at the bottom of the page.
2. To import tax rates, do the following:
  - a. Tap **Choose File**, and navigate to the CSV file with the tax rates to be imported.
  - b. Tap **Import Tax Rates**.
3. To export tax rates, tap **Export Tax Rates**.

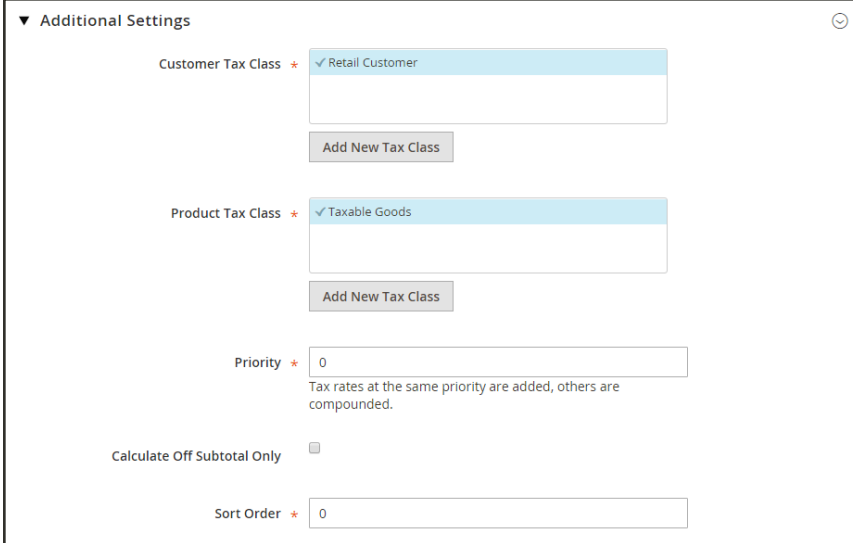
To learn more, see: [Import/Export Tax Rates](#).

*Import / Export Tax Rates*

## Step 2: Complete the Additional Settings

4. Tap **Additional Settings** to open the section. Then, do the following:
  - a. Choose the **Customer Tax Class** to which the rule applies.
    - To edit a customer tax class, tap the edit ✎ icon. Then, update the form as needed, and tap **Save**.
    - To create a new tax class, tap **Add New Tax Class**. Then, complete the form as needed, and tap **Save**.
  - b. Choose the **Product Tax Class** to which the rule applies.
    - To edit a product tax class, tap the edit ✎ icon. Then, update the form as needed, and tap **Save**.
    - To create a new tax class, tap **Add New Tax Class**. Then, complete the form as needed, and tap **Save**.
  - c. In the **Priority** field, enter a number to indicate the priority of this tax, when more than one tax applies. If two tax rules with the same priority apply, then the taxes are added together. If two taxes with different priority settings apply, then the taxes are compounded.
  - d. If you want taxes to be based on the order subtotal, mark the **Calculate off Subtotal Only** checkbox.

- e. In the **Sort Order** field, enter a number to indicate the order of this tax rule when listed with others.



The screenshot shows a form titled "Additional Settings" with a close button in the top right corner. The form contains the following fields and options:

- Customer Tax Class \***: A dropdown menu with "Retail Customer" selected. Below it is an "Add New Tax Class" button.
- Product Tax Class \***: A dropdown menu with "Taxable Goods" selected. Below it is an "Add New Tax Class" button.
- Priority \***: A text input field containing "0". Below it is a note: "Tax rates at the same priority are added, others are compounded."
- Calculate Off Subtotal Only**: A checkbox that is currently unchecked.
- Sort Order \***: A text input field containing "0".

*Additional Settings*

5. When complete, tap **Save Rule**.

## Tax Classes

Tax classes can be assigned to customers, products, and shipping. Magento analyzes the shopping cart of each customer and calculates the appropriate tax according to the class of the customer, the class of the products in the cart, and the region (as determined by the customer's shipping address, billing address or shipping origin). New tax classes can be created when a **tax rule** is defined.



### Customer

---

You can create as many customer tax classes as you need, and assign them to **customer groups**. For example, in some jurisdictions, wholesale transactions are not taxed, but retail transactions are. You can associate members of the Wholesale Customer group with the Wholesale tax class.



### Product

---

Product classes are used in calculations to determine the correct tax rate is applied in the shopping cart. When you create product, it is assigned to a specific tax class. For example, food might not be taxed, or be taxed at a different rate.



### Shipping

---

If your store charges an additional tax on shipping, you should designate a specific product tax class for shipping. Then in the configuration, specify it as the tax class that is used for shipping.

## Configuring Tax Classes

The tax class that is used for shipping, and the default tax classes for products and customers are set in the Sales configuration.



The screenshot shows the 'Tax Classes' configuration panel. It has a title 'Tax Classes' and a close button in the top right corner. There are three rows of configuration options:

Configuration Option	Selected Value	Scope
Tax Class for Shipping	None	[WEBSITE]
Default Tax Class for Product	Taxable Goods	[GLOBAL]
Default Tax Class for Customer	Retail Customer	[GLOBAL]

### *Tax Classes*

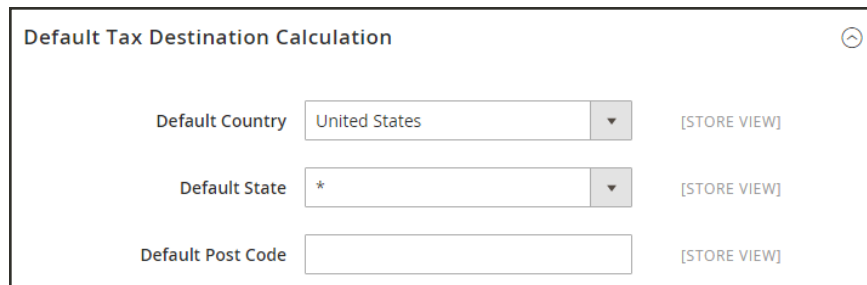
#### To configure tax classes:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Tax**.
3. Expand ☑ the **Tax Classes** section. Then, choose the tax class for each of the following:
  - Set Tax Class for Shipping
  - Default Tax Class for Product
  - Default Tax Class for Customer
4. When complete, tap **Save Config**.



## Default Tax Destination

The default tax destination settings determine the country, state, and ZIP or postal code that are used as the basis of tax calculations.

The screenshot shows a configuration panel titled "Default Tax Destination Calculation" with a close icon in the top right corner. It contains three rows of settings. The first row is "Default Country" with a dropdown menu showing "United States" and a "[STORE VIEW]" link. The second row is "Default State" with a dropdown menu showing "\*" and a "[STORE VIEW]" link. The third row is "Default Post Code" with a text input field and a "[STORE VIEW]" link.

*Default Tax Destination Calculation*

### To configure the default tax destination for calculations:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configure**.
2. In the panel on the left under **Sales**, choose **Tax**.
3. Expand ☺ the **Default Tax Destination Calculation** section. Then, do the following:
  - a. Set **Default Country** to the country upon which tax calculations are based.
  - b. Set **Default State** to the state or province that is used as the basis of tax calculations.
  - c. Set **Default Post Code** to the ZIP or postal code that is used as the basis of local tax calculations.
4. When complete, tap **Save Config**.

## EU Place of Supply for Digital Goods

European Union (EU) merchants must report their digital goods sold by quarter to each member country. Digital goods are taxed based on the customer's shipping address. The law requires merchants to run a tax report and identify the relevant tax amounts for digital goods, as opposed to physical goods.

Merchants must report all digital goods sold by EU member countries on a quarterly basis to a central tax administration, along with payment due for tax collected during the period.

Merchants who have not yet reached the threshold (50k/100k Euro of annual business) must continue to report physical goods sold to the EU states where they have registered VAT numbers.

Merchants who are audited for taxes paid for digital goods, must provide two pieces of supporting information to establish the customer place of residence.

- The customer's shipping address and a record of a successful payment transaction can be used to establish the customer place of residence. (Payment is accepted only if the shipping address matches payment provider information.)
- The information can also be captured directly from the data store in the Magento database tables.

### To collect digital goods tax information:

1. Load the tax rates for all EU member countries.
2. Create a digital goods product tax class.
3. Assign all your digital goods to the digital goods product tax class.
4. Create **tax rules** for your physical goods, using physical product tax classes, and associate them with the appropriate tax rates.
5. Create tax rules for your digital goods, using use the product tax class for digital goods, and associate them with the appropriate tax rates for EU member countries.
6. Run the tax report for the appropriate period, and collect the required digital goods information.
7. Export the tax amounts that are related to the tax rates for the digital goods product tax class.

### See also:

[European Commission Taxation and Customs Union](#)

[EU 1015 Place of Supply Changes](#)

## Fixed Product Tax

Some tax jurisdictions have a fixed tax that must be added to certain types of products. You can set up a fixed product tax (FPT) as needed for your store's tax calculations. For example, in some countries FPT can be used to set up a Waste Electrical and Electronic Equipment Directive (WEEE) tax, also known as "ecological tax" or "eco tax," that is collected on certain types of electronics to offset the cost of recycling. This tax is a fixed amount, rather than a percentage of the product price.

Fixed product taxes apply at the item level, based on the product. In some jurisdictions this tax is subject to an additional % tax calculation. Your tax jurisdiction might also have rules about how the product price appears to customers, either with or without tax. Be sure that you understand the rules, and set your FPT display options accordingly.

We recommend that you exercise caution when quoting FPT prices in email, because the difference in price can affect customer confidence in their orders. For example, if you display Order Review prices without showing FPT, customers who buy items with associated FPT will see a total that includes the FPT tax amount, but without an itemized breakdown. The difference in price might lead some customers to abandon their carts because the total differs from the amount expected.

### FPT Display Prices

FPT	DISPLAY SETTING AND CALCULATION	
Not Taxed	Excluding FPT	FPT appears as a separate row in the cart, and the value is used in appropriate tax calculations.
	Including FPT	FPT is added to the base price of an item; but is not included in tax- rule-based calculations.
	Excluding FPT, FPT Description, Final Price	Prices appear without FPT amount or description. FPT is not included in tax-rule-based calculations.
Taxed	Excluding FPT	FPT appears as a separate row in the cart, and the value is used in appropriate tax calculations.
	Including FPT	FPT is included in the price of an item, and no change to tax calculations is required.
	Excluding FPT, FPT Description, Final Price	Prices appear without the FPT amount or description. However, FPT is included in tax-rule-based calculations.

## Configuring FPT

The Fixed Product Tax **input type** creates a section of fields for managing tax for each region.

The following instructions show how to set up a fixed product tax for your store, using “eco tax” as an example. After setting the scope for the tax and the countries and states where the tax applies, and depending on the options you choose, the input fields can change according to the local requirements. To learn more, see: [Creating Attributes](#).

### Process Overview:

Step 1: [Enable Fixed Product Tax](#)

Step 2: [Create an FPT Attribute](#)

Step 3: [Add the FPT Attribute to an Attribute Set](#)

Step 4: [Apply FPT to Products](#)

### Step 1: Enable Fixed Product Tax

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Tax**.
3. Expand ☺ the **Fixed Product Taxes** section. Then, do the following:
  - a. Set **Enable FPT** to “Yes.”
  - b. To determine how fixed product taxes are used in store prices, choose the FPT setting for each of the following price display locations. (The options are the same for each location.)
    - Product View Page
    - Sales Modules
    - Emails

#### OPTIONS

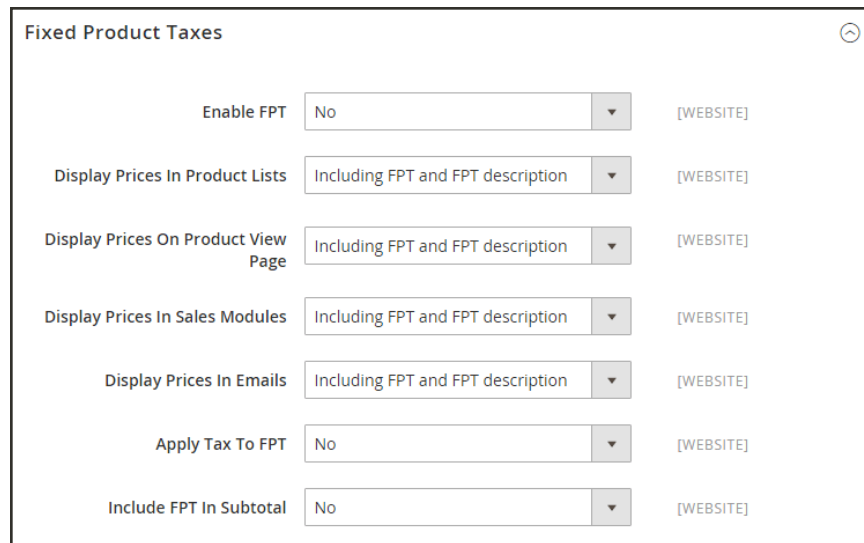
Including FPT Only

Including FPT and FPT description

Excluding FPT. Including FPT description and final price

Excluding FPT

- c. Set **Apply Tax to FPT** as needed.
- d. Set **Include FPT in Subtotal** as needed.



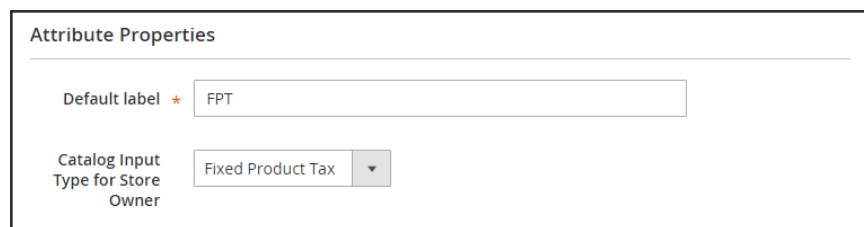
Fixed Product Taxes		
Enable FPT	No	[WEBSITE]
Display Prices In Product Lists	Including FPT and FPT description	[WEBSITE]
Display Prices On Product View Page	Including FPT and FPT description	[WEBSITE]
Display Prices In Sales Modules	Including FPT and FPT description	[WEBSITE]
Display Prices In Emails	Including FPT and FPT description	[WEBSITE]
Apply Tax To FPT	No	[WEBSITE]
Include FPT In Subtotal	No	[WEBSITE]

*Fixed Product Taxes*

4. When complete, tap **Save Config.**

## Step 2: Create an FPT Attribute

1. On the Admin sidebar, tap **Stores**. Then under **Attributes** choose **Product**.
2. In the upper-right corner, tap **Add New Attribute**. Then, do the following:
  - a. Enter a **Default Label** to identify the attribute.
  - b. Set **Catalog Input for Store Owner** to “Fixed Product Tax.”

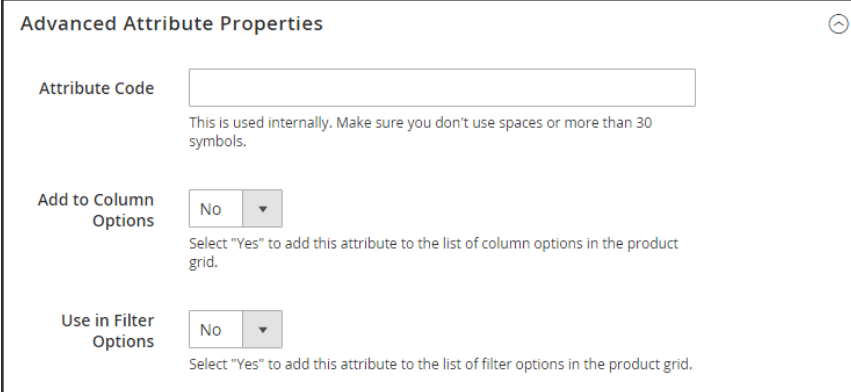


Attribute Properties	
Default label *	FPT
Catalog Input Type for Store Owner	Fixed Product Tax

*Attribute Properties*

3. Expand ☺ the **Advanced Attribute Properties** section. Then, do the following:
  - a. In the **Attribute Code** field, enter a unique identifier in lowercase, without spaces or special characters. The maximum length is 30 characters. You can leave the field blank to the text from the Default Label field.
  - b. If you want the FPT field to appear in the Inventory **grid**, set **Add to Column Options** to “Yes.”

- c. If you want to be able to **filter** products in the grid based on the value of the FPT field, set **Use in Filter Options** to “Yes.”



**Advanced Attribute Properties**

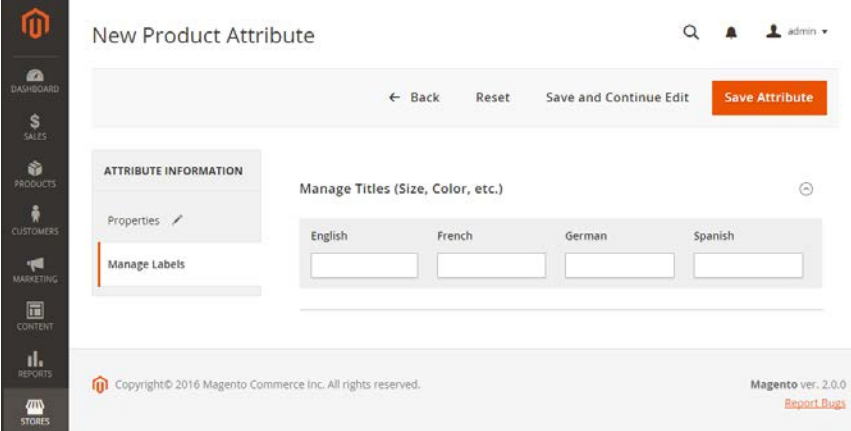
Attribute Code   
This is used internally. Make sure you don't use spaces or more than 30 symbols.

Add to Column Options    
Select "Yes" to add this attribute to the list of column options in the product grid.

Use in Filter Options    
Select "Yes" to add this attribute to the list of filter options in the product grid.

*Advanced Attribute Properties*

4. (Optional) In the panel on the left, choose **Manage Labels**. Then, enter a label to use instead of the default label for each store view.



**New Product Attribute**

← Back   Reset   Save and Continue Edit   **Save Attribute**

**ATTRIBUTE INFORMATION**

Properties

**Manage Labels**

**Manage Titles (Size, Color, etc.)**

English   French   German   Spanish

English    French    German    Spanish

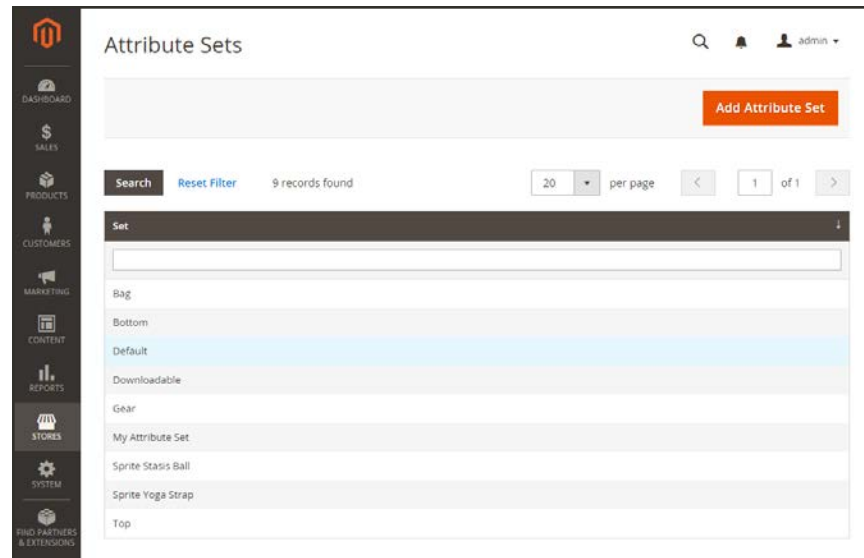
Copyright © 2016 Magento Commerce Inc. All rights reserved.   **Magento ver. 2.0.0**   [Report Bugs](#)

*Manage Labels*

5. When complete, tap **Save Attribute**. Then when prompted, refresh the **cache**.

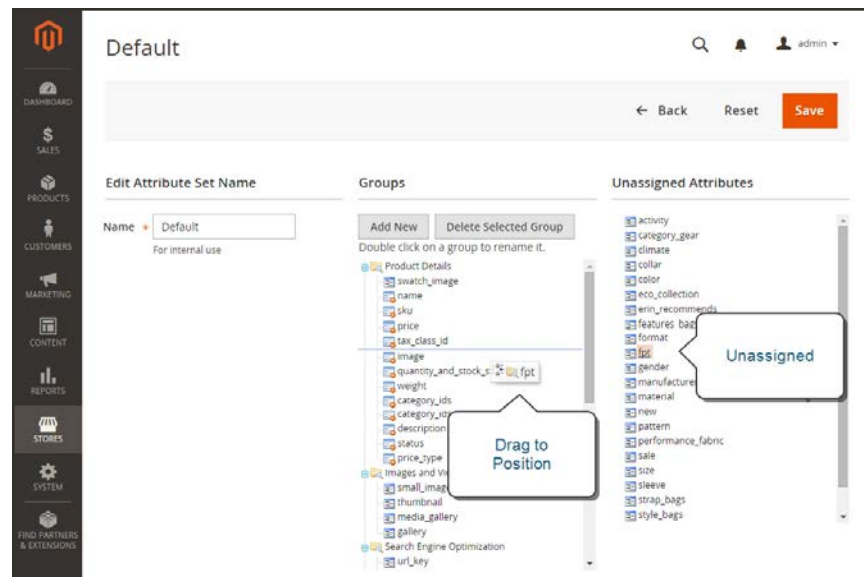
### Step 3: Add the FPT Attribute to an Attribute Set

1. On the Admin sidebar, tap **Stores**. Then under **Attributes**, choose **Attribute Set**.
2. In the list, tap the attribute set to open the record in edit mode.



3. Drag the FPT attribute from the list of **Unassigned Attributes** on the right to the **Groups** list in the center column.

Each group folder corresponds to a section of product information. You can place the attribute wherever you want it to appear when the product is open in edit mode.



*Edit Attribute Set*

- 4. When complete, tap **Save**.
- 5. Repeat this step for each attribute set that needs to include fixed product tax.

**Step 4: Apply FPT to Specific Products**

- 1. On the Admin sidebar, tap **Products**. Then under **Inventory**, choose **Catalog**.
- 2. Open the product that needs a fixed product tax in edit mode.
- 3. Find the FPT section of fields that you added to the attribute set. Tap **Add Tax**, and do the following:

FPT	Website	Country/State	Tax	Action
	All Web: ▾	Belgium ▾	0.30	Delete Tax
		▾		
Add Tax				

*Fixed Product Tax for Belgium*

- a. If your Magento installation has multiple websites, choose the appropriate **Website** and base currency. In this example, the field is set by default to “All Websites [USD],”
- a. Set **Country/State** to the region where the fixed product tax applies.
- b. Enter the fixed product tax as a decimal amount in the **Tax** field.
- c. To add more fixed product taxes, tap **Add Tax**, and repeat the process.
- 4. When complete, tap **Save**.



## Price Display Settings

The price display settings determine if product and shipping prices include or exclude tax, or show two versions of the price; one with, and the other without tax.

If the product price includes tax, the tax appears only if there is a tax rule that matches the tax origin, or if a customer address matches the tax rule. Events that can trigger a match include when a customer creates an account, logs in, or generates a tax and shipping estimate from the shopping cart.

**Important!** Showing prices that include and exclude tax can be confusing to the customer. To avoid triggering a warning message, see the [guidelines](#) for your country, and [recommended settings](#). to avoid warning messages.

Price Display Settings		
Display Product Prices In Catalog	Excluding Tax	[STORE VIEW]
Display Shipping Prices	Excluding Tax	[STORE VIEW]

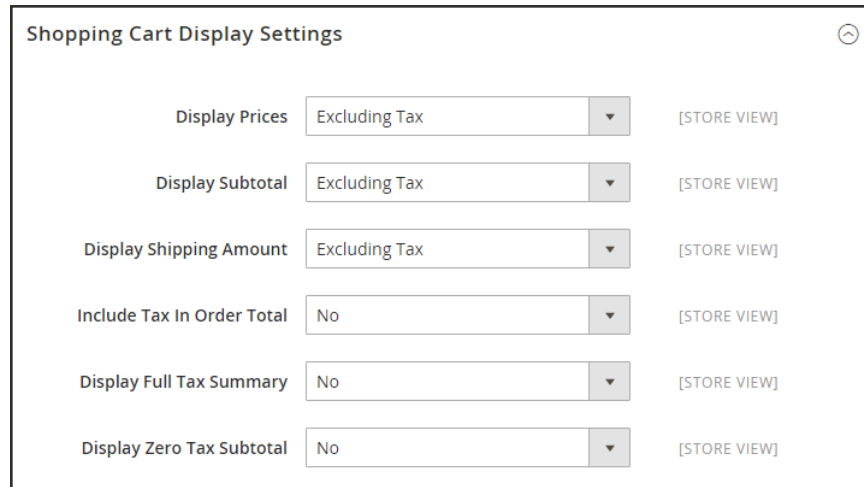
*Price Display Settings*

### Step 1: Configure Price Display Settings

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Taxes**.
3. Expand ☺ the **Price Display Settings** section. Then, do the following:
  - a. Set **Display Product Prices in Catalog** to one of the following:
    - Excluding Tax
    - Including Tax
    - Including and Excluding Tax
  - b. Set **Display Shipping Prices** to one of the following:
    - Excluding Tax
    - Including Tax
    - Including and Excluding Tax

## Step 2: Configure Shopping Cart Display Settings

1. Expand  the **Shopping Cart Display Settings** section. Then, do the following:



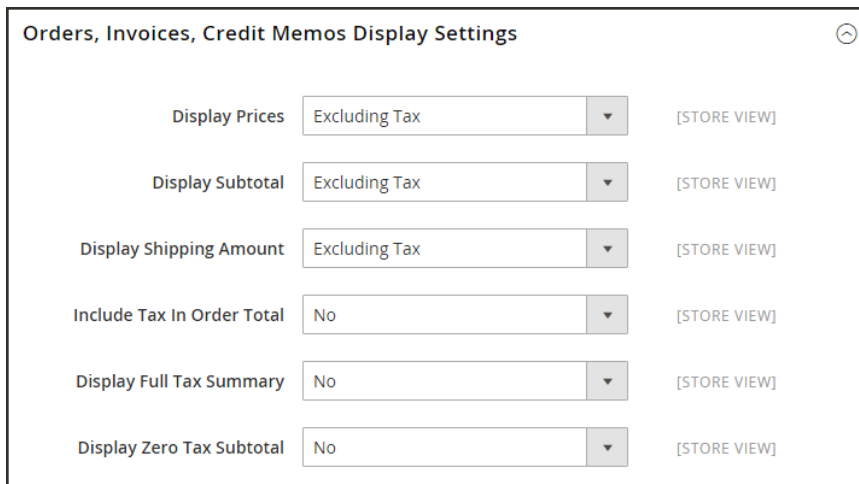
Shopping Cart Display Settings		
Display Prices	Excluding Tax	[STORE VIEW]
Display Subtotal	Excluding Tax	[STORE VIEW]
Display Shipping Amount	Excluding Tax	[STORE VIEW]
Include Tax In Order Total	No	[STORE VIEW]
Display Full Tax Summary	No	[STORE VIEW]
Display Zero Tax Subtotal	No	[STORE VIEW]

*Shopping Cart Display Settings*

- a. Set **Display Prices** to one of the following:
  - Excluding Tax
  - Including Tax
  - Including and Excluding Tax
- b. Set **Display Subtotal** to one of the following:
  - Excluding Tax
  - Including Tax
  - Including and Excluding Tax
- c. Set **Display Shipping Amount** to one of the following:
  - Excluding Tax
  - Including Tax
  - Including and Excluding Tax
- d. Set the following to “Yes” or “No” according to your preference:
  - Include Tax in Order Total
  - Display Full Tax Summary
  - Display Zero Tax Subtotal

### Step 3: Configure Order, Invoice & Credit Memo Display Settings

1. Expand  the **Orders, Invoices, Credit Memos Display Settings** section. Then, do the following:



Orders, Invoices, Credit Memos Display Settings		
Display Prices	Excluding Tax	[STORE VIEW]
Display Subtotal	Excluding Tax	[STORE VIEW]
Display Shipping Amount	Excluding Tax	[STORE VIEW]
Include Tax In Order Total	No	[STORE VIEW]
Display Full Tax Summary	No	[STORE VIEW]
Display Zero Tax Subtotal	No	[STORE VIEW]

*Orders, Invoices, Credit Memos Display Settings*

- a. Set **Display Prices** to one of the following:
    - Excluding Tax
    - Including Tax
    - Including and Excluding Tax
  - b. Set **Display Subtotal** to one of the following:
    - Excluding Tax
    - Including Tax
    - Including and Excluding Tax
  - c. Set **Display Shipping Amount** to one of the following:
    - Excluding Tax
    - Including Tax
    - Including and Excluding Tax
  - d. Set the following to “Yes” or “No” according to your preference:
    - Include Tax in Order Total
    - Display Full Tax Summary
    - Display Zero Tax Subtotal
2. When complete, tap **Save Config.**

## Tax Zones and Rates

Tax rates generally apply to transactions that take place within a specific geographical area. The Tax Zones and Rates tool enables you to specify the tax rate for each geographical area from which you collect and remit taxes. Because each tax zone and rate has a unique identifier, you can have multiple tax rates for a given geographic area (such as places that do not tax food or medicine, but do tax other items).

Store tax is calculated based on the store's address. The actual customer tax for an order is calculated after the customer completes the order information. Magento then calculates the tax based upon the tax configuration of the store.

Tax Identifier	Country	State/Region	Zip/Post Code	Rate
US-CA-*Rate 1	United States	CA	*	8.25
US-NY-*Rate 1	United States	NY	*	8.375

*Tax Zones and Rates*

### To define a new tax rate:

1. On the Admin sidebar, tap **Stores**. Under **Taxes**, choose **Tax Zones and Rates**.
2. In the upper-right corner, tap **Add New Tax Rate**.
3. Enter a **Tax Identifier**.
4. To apply the tax rate to a single ZIP or postal code, enter the code in the **Zip/Post Code** field.
5. The asterisk wildcard (\*) can be used to match up to ten characters in the code. For example, 90\* represents all ZIP codes from 90000 through 90999.
6. To apply the tax rate to a range of ZIP or postal codes, do the following::
  - a. Mark the **Zip/Post is Range** checkbox.
  - b. Enter the first ZIP or postal code in the range.
  - c. Enter the last ZIP or postal code in the range.
  - d. Choose the **State** where the tax rate applies.
  - e. Choose the **Country** where the tax rate applies.

- f. Enter the **Rate Percent** that is used for the tax rate calculation.
7. When complete, tap **Save Rate**.

The screenshot shows the 'New Tax Rate' form in the Magento Admin interface. The form is titled 'New Tax Rate' and has a sidebar on the left with navigation options: Dashboard, Sales, Products, Customers, Marketing, Content, Reports, Stores, and System. The form fields are: Tax Identifier (text input), Zip/Post is Range (checkbox), Zip/Post Code (text input with a note: '\* - matches any; 'xyz\*' - matches any that begins on 'xyz' and are not longer than 10), State (dropdown menu showing 'California'), Country (dropdown menu showing 'United States'), and Rate Percent (text input). At the top right of the form, there are buttons for 'Back', 'Reset', and 'Save Rate'.

*New Tax Rate*

### To edit an existing tax rate:

1. On the Admin sidebar, tap **Stores**. Then under **Taxes**, choose **Tax Zones and Rates**.
2. Find the tax rate in the Tax Zones and Rates grid, and open the record in edit mode.  
If there are many rates in the list, use the **filter controls** to find the rate you need.
3. Make the necessary changes to the **Tax Rate Information**.
4. Update the **Tax Titles** as needed.
5. When complete, tap **Save Rate**.

## Import/Export Tax Rates

If you conduct business in several states and ship a large quantity of product, entering tax rates manually can be very time consuming. It is faster and more efficient to download tax rates by ZIP code and import them into Magento. The following example shows how to import a set of California tax rates downloaded from the [Avalara](#) website. Avalara is a [Magento Technology Partner](#) and provides [tax rate tables](#) for every ZIP code in the United States, which you can download at no charge.

### Process Overview:

Step 1: [Export the Magento Tax Rate Data](#)

Step 2: [Prepare the Import Data](#)

Step 3: [Import the Tax Rates](#)

### Step 1: Export the Magento Tax Rate Data

1. On the Admin sidebar, tap **System**. Then under **Data Transfer**, choose **Import/Export Tax Rates**.
2. Tap **Export Tax Rates**. Look for the download file in the lower-left corner of the browser window.
3. Save the file, and then open it in a spreadsheet. (In this example, we use OpenOffice Calc.)

The exported Magento tax rate data includes the following columns:

- Code
- Country
- State
- Zip/Post Code
- Rate
- Range From
- Range To
- A column for each store view

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Code	Country	State	Zip/Post Code	Rate	Zip/Post is Range	Range From	Range To	english	french	german	spanish	
2	US-CA-*Rate 1	US	CA	*	8.25								
3	US-NY-*Rate 1	US	NY	*	8.375								
4	US-MI-*Rate 1	US	MI	*	8.25								
5													
6													

*Exported Tax Rate Data*

4. Open the new tax rate data in a second instance of the spreadsheet, so you can see both, side by side.


In the new tax rate data, take note of any additional tax rate data that you might need to set up in your store before the data is imported. For example, the tax rate data for California also includes:

- TaxRegionName
- CombinedRate
- StateRate
- CountyRate
- CityRate
- SpecialRate

If you need to import additional **tax zones and rates**, you must first define them from the Admin of your store, and update the **tax rules** as needed. Then, export the data, and open the file in OpenOffice Calc, so it can be used for reference. However, to keep this example simple, we will import only the standard tax rate columns.

## Step 2: Prepare the Import Data

You now have two spreadsheets open, side by side. One with the Magento export file structure, and the other with the new tax rate data that you want to import.

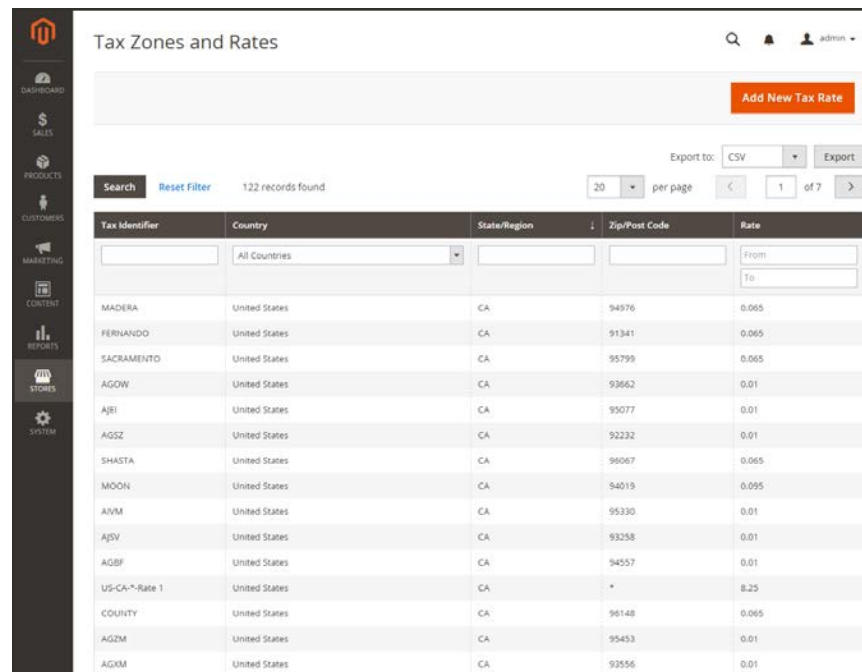
1. To create a place to work in the spreadsheet with the new data, insert as many blank columns at the far left as needed. Then, use cut and paste to rearrange the columns so they match the order of the Magento export data.
2. Rename the column headers to match the Magento export data.
3. Delete any columns that have no data. Otherwise, the structure of the import file should match the original Magento export data.
4. Before saving the file, scroll down and make sure that the tax rate columns contain only numeric data. Any text found in a tax rate column will prevent the data from being imported.
5. Save the prepared data as a .CSV file. When prompted, verify that a comma is used as a **Field delimiter**, and double quotes as the **Text delimiter**. Then, tap .

### Step 3: Import the Tax Rates

1. On the Admin sidebar, tap **System**. Then under **Data Transfer**, choose **Import/Export Tax Rates**.
2. Tap **Browse**, and choose the .CSV tax rate file that you prepared to import. Then, tap **Import Tax Rates**.

It might take several minutes to import the data. When the process is complete, the message, "The tax rate has been imported" appears. If you receive an error message, correct the problem in the data and try again.

3. On the Admin sidebar, tap **Stores**. Then under Taxes, choose **Tax Zones and Rates**. The imported rates appear in the list. Use the **page controls** to view the new tax rates.



The screenshot shows the 'Tax Zones and Rates' page in the Magento Admin. The left sidebar has the 'SYSTEM' menu item selected. The main content area has a search bar, a 'Reset Filter' button, and a message '122 records found'. Below this is a table with columns: Tax Identifier, Country, State/Region, Zip/Post Code, and Rate. The table lists various tax zones for the United States, including MADERA, FERNANDO, SACRAMENTO, AGOW, AJRI, AGSZ, SHASTA, MOON, AIVM, AJSV, AGBF, US-CA~Rate 1, COUNTY, AGZM, and AGXM. The 'Rate' column shows values like 0.065, 0.01, and 8.25. At the top right, there is an 'Add New Tax Rate' button and an 'Export' dropdown menu set to 'CSV'.

Tax Identifier	Country	State/Region	Zip/Post Code	Rate
MADERA	United States	CA	94376	0.065
FERNANDO	United States	CA	91341	0.065
SACRAMENTO	United States	CA	95799	0.065
AGOW	United States	CA	93662	0.01
AJRI	United States	CA	95077	0.01
AGSZ	United States	CA	92232	0.01
SHASTA	United States	CA	96067	0.065
MOON	United States	CA	94019	0.095
AIVM	United States	CA	95330	0.01
AJSV	United States	CA	93258	0.01
AGBF	United States	CA	94557	0.01
US-CA~Rate 1	United States	CA	*	8.25
COUNTY	United States	CA	96148	0.065
AGZM	United States	CA	95453	0.01
AGXM	United States	CA	93556	0.01

*Imported Tax Rates*

4. Run some test transactions in your store with customers from different ZIP codes to make sure that the new tax rates work correctly.



## Value Added Tax (VAT)

Some countries charge a value added tax, or VAT, on goods and services. There can be different VAT rates depending on which stage you as a merchant are at in the manufacture or distribution of the products, materials, or services that you sell to your customers. In this case you may need to use more than one VAT rate in your store for tax calculation purposes.

## Configuring VAT

The following instructions include a sample procedure to set up a 20% VAT in the U.K. for sales to retail customers. For other tax rates and countries, follow the general procedure but enter specific information that corresponds to your country, VAT rate, customer types, and so on.

Before proceeding, make sure to find out which rules and regulations apply to VAT in your area.

In certain business-to-business transactions, VAT is not assessed. Magento can validate a customer's VAT ID to ensure that VAT is assessed (or not assessed) properly. To learn more, see: VAT Validation.

### Process Overview:

Step 1: [Set Up Customer Tax Classes](#)

Step 2: [Set Up Product Tax Classes](#)

Step 3: [Set Up Tax Zones and Rates](#)

Step 4: [Set Up Tax Rules](#)

Step 5: [Apply Tax Classes to Products](#)

### Step 1: Set Up Customer Tax Classes

1. On the Admin sidebar, tap **Stores**. Then choose, select **Tax Zones and Rates**.
2. Ensure that there is a customer tax class that is appropriate to use with the VAT. For this example, ensure that there is a customer tax class named Retail Customer. If Retail Customer does not exist, click the **Add New** button and add it.

### Step 2: Set Up Product Tax Classes

1. On the Admin menu, select **Sales > Tax > Product Tax Classes**.
2. Click the **Add New** button and create three new classes:
  - VAT Standard
  - VAT Reduced
  - VAT Zero

3. Click the **Save Class** button for each new class that you add.

### Step 3: Set Up Tax Zones and Rates

1. On the Admin menu, select **Sales > Tax > Manage Tax Zones & Rates**.

For this example you can remove the U.S. tax rates, or leave them as they are.

2. Click the **Add New Tax Rate** button. Add new rates as follows:

NEW TAX RATE	SETTINGS	
VAT Standard	Tax Identifier:	VAT Standard
	Country and State:	United Kingdom
	Rate Percent:	20.00
VAT Reduced	Tax Identifier:	VAT Reduced
	Country and State:	United Kingdom
	Rate Percent:	5.00

3. Click the **Save Rate** button for each rate.

### Step 4: Set Up Tax Rules

A tax rule is a combination of a customer tax class, a product tax class, and a tax rate.

1. On the Admin menu, select **Sales > Tax > Manage Tax Rules**.

2. Add new tax rules as follows:

NEW TAX RULE	SETTINGS	
VAT Standard	Name:	VAT Standard
	Customer Tax Class:	Retail Customer
	Product Tax Class:	VAT Standard
	Tax Rate:	VAT Standard Rate
VAT Reduced	Name:	VAT Reduced
	Customer Tax Class:	Retail Customer
	Product Tax Class:	VAT Reduced
	Tax Rate:	VAT Reduced Rate

3. Click the **Save Rule** button for each rate.

### **Step 5: Apply Tax Classes to Products**

1. On the Admin menu, select **Catalog > Manage Products**.
2. Open a product from your catalog in edit mode.
3. On the General page, find the **Tax Class** field. Then, select the **VAT Class** that applies to the product.
4. When complete, click the **Save** button.

## VAT ID Validation

VAT ID Validation automatically calculates the required tax for B2B transactions that take place within the European Union (EU), based on the merchant and customer locale. Magento performs VAT ID validation using the web services of the [European Commission](#) server.

VAT-related tax rules do not influence other tax rules, and do not prevent the application of other tax rules. Only one tax rule can be applied at a given time.

- VAT is charged if the merchant and customer are located in the same EU country.
- VAT is not charged if the merchant and customer are located in different EU countries, and both parties are EU-registered business entities.

The store administrator creates more than one default customer group that can be automatically assigned to the customer during account creation, address creation or update, and checkout. The result is that different tax rules are used for intra-country (domestic) and intra-EU sales.

**Important:** If you sell virtual or downloadable products, which by their nature do not require shipping, the VAT rate of a customer's location country should be used for both intra-union and domestic sales. You must create additional individual tax rules for product tax classes that correspond to the virtual products.

### Customer Registration Workflow

If VAT ID Validation is enabled, after registration each customer is proposed to enter the VAT ID number. However only those who are registered VAT customers are expected to fill this field.

After a customer specifies the VAT number and other address fields, and chooses to save, the system saves the address and sends the VAT ID validation request to the European Commission server. According to the results of the validation, one of the default groups is assigned to a customer. This group can be changed if a customer or an administrator changes the VAT ID of the default address or changes the whole default address. The group can be temporarily changed (group change will be emulated) in some cases during one-page checkout.

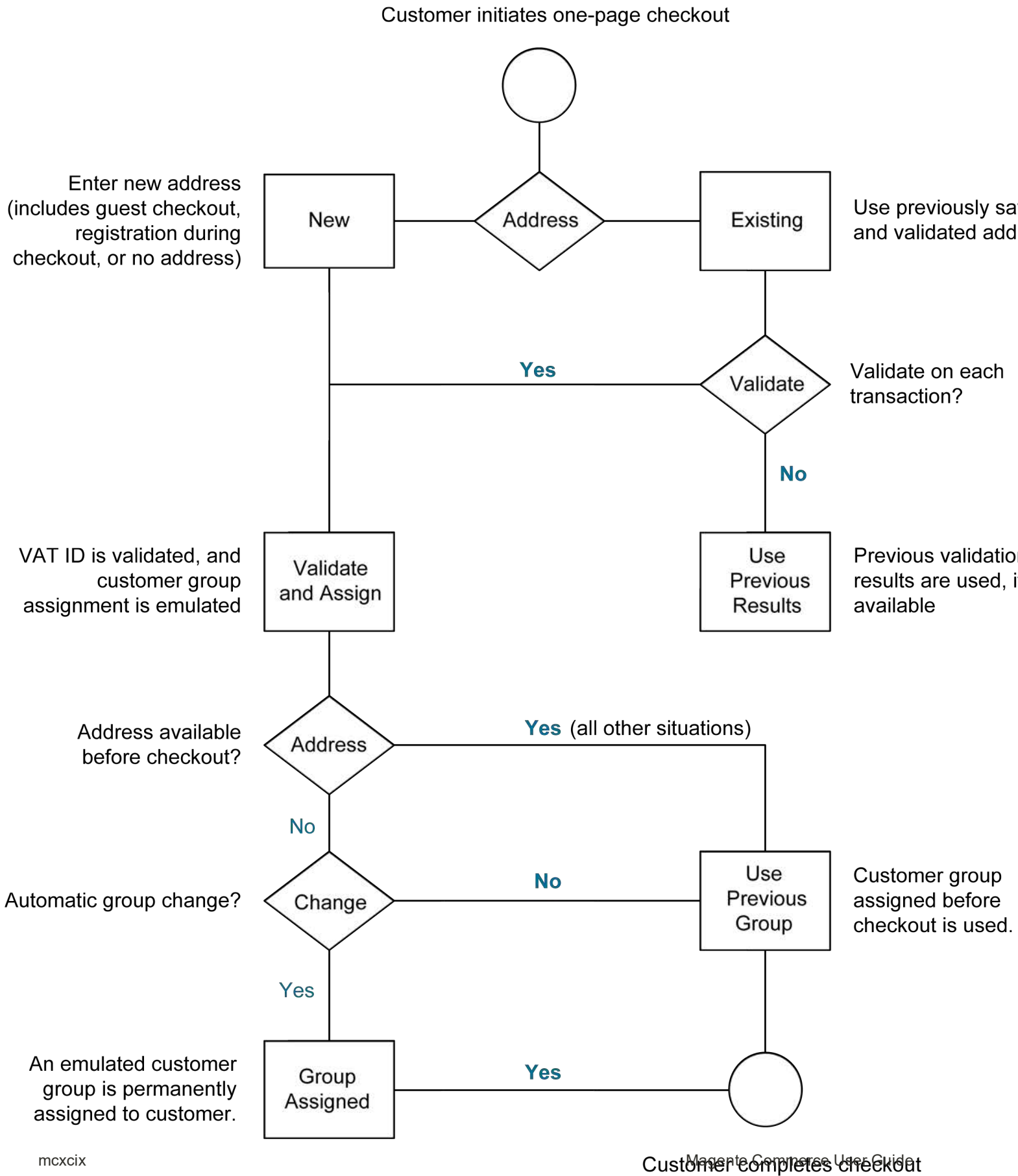
If enabled, you can override VAT ID Validation for individual customers by selecting the checkbox on the Customer Information page.

## Checkout Workflow

If a customer's VAT validation is performed during checkout, the VAT request identifier and VAT request date are saved in the Comments History section of the order.

The system behavior concerned with the VAT ID validation and the customer group change during the checkout depends on how the Validate on Each Transaction and the Disable Automatic Group Change settings are configured. This section describes the implementation of the VAT ID Validation functionality for the checkout on the frontend.

In case a customer uses Google Express Checkout, PayPal Express Checkout or another external checkout method, when the checkout is performed completely on the side of the external payment gateway, the Validate on Each Transaction setting cannot be applied. Thus the customer group cannot change during checkout.



## Configuring VAT ID Validation

To configure VAT ID validation, you must first set up the customer groups that are needed, and create the related tax classes, rates, and rules. Then, enable VAT ID validation for the store, and complete the configuration.

The following examples show how tax classes and rates are used for VAT ID Validation. Take a look at the examples, and then follow the instructions to set up the tax classes and rules that are needed for your store.

### Example: Minimal Tax Rules Required for VAT ID Validation

#### TAX RULE #1

Customer Tax Class	Customer tax classes must include: A class for domestic customers A class for customers with invalid VAT ID A class for customers, for whom VAT ID validation failed
Product Tax Class	Product tax classes must include a class for products of all types, except bundle and virtual.
Tax Rate	The tax rate must include the VAT rate of the merchant's country.

#### TAX RULE #2

Customer Tax Class	A class for intra-union customers.
Product Tax Class	A class for products of all types, except virtual.
Tax Rate	VAT rates for all EU countries, except merchant's country. Currently this rate is 0%.

#### TAX RULE #3 (REQUIRED FOR VIRTUAL AND DOWNLOADABLE PRODUCTS)

Customer Tax Class	Customer tax classes must include: A class for domestic customers A class for customers with invalid VAT ID A class for customers, for whom VAT ID validation failed
Product Tax Class	A class for virtual products.
Tax Rate	VAT rate of the merchant's country.

#### TAX RULE #4 (REQUIRED FOR VIRTUAL AND DOWNLOADABLE PRODUCTS)

Customer Tax Class	A class for intra-union customers.
--------------------	------------------------------------

**TAX RULE #4 (REQUIRED FOR VIRTUAL AND DOWNLOADABLE PRODUCTS)**

Product Tax Class	A class for virtual products.
Tax Rate	VAT rates for all EU countries, except merchant's country. Currently this rate is 0%.

**Process Overview:**Step 1: [Create VAT-Related Customer Groups](#)Step 2: [Create VAT-Related Classes, Rates and Rules](#)Step 3: [Enable and Configure VAT ID Validation](#)Step 4: [Set your VAT ID and Location Country](#)Step 5: [Verify the List of EU Member Countries](#)**Step 1: Create VAT-Related Customer Groups**

VAT ID Validation automatically assigns one of the four default customer groups to customers according to VAT ID validation results:

- Domestic
- Intra-EU
- Invalid VAT ID
- Validation error

You can create new customer groups for VAT ID Validation or use existing groups, if they comply with your business logic. When configuring VAT ID Validation, you must assign each of the created customer groups as a default for customers with appropriate VAT ID validation results.

**Step 2: Create VAT-Related Classes, Rates, and Rules**

Each tax rule is defined by three entities:

- Customer Tax Classes
- Product Tax Classes
- Tax Rates

Create the **tax rules** that you need to use VAT ID Validation effectively.

- Tax rules include tax rates and **tax classes**.
- Tax classes are assigned to **customer groups**.



### Step 3: Enable and Configure VAT ID Validation

1. On the Admin sidebar, tap **Stores**. Under **Settings**, choose **Configuration**.
2. If necessary, set the **Store View** for the configuration.
3. In the panel on the left under **Customers**, choose **Customer Configuration**.
4. Expand ☑ the **Create New Account Options** section.

Create New Account Options

Enable Automatic Assignment to Customer Group

Yes

Tax Calculation Based On

Billing Address

Use system value

Default Group

General

Use system value

Group for Valid VAT ID - Domestic

-- Please Select --

Group for Valid VAT ID - Intra-Union

-- Please Select --

Group for Invalid VAT ID

-- Please Select --

Validation Error Group

-- Please Select --

Validate on Each Transaction

No

Default Value for Disable Automatic Group Changes Based on VAT ID

Yes

Show VAT Number on Storefront

No

Use system value

To show VAT number on Storefront, set Show VAT Number on Storefront option to Yes.

Default Email Domain

example.com

Use system value

Default Welcome Email

New Account (Default)

Use system value

Email template chosen based on theme fallback when "Default" option is selected.

Default Welcome Email Without Password

New Account Without Password (Default)

Use system value

This email will be sent instead of the Default Welcome Email, if a customer was created without password.

Email template chosen based on theme fallback when "Default" option is selected.

Email Sender

General Contact

Use system value

Require Emails Confirmation

No

Use system value

Confirmation Link Email

New Account Confirmation Key (Default)

Use system value

Email template chosen based on theme fallback when "Default" option is selected.

Welcome Email

New Account Confirmed (Default)

Use system value

This email will be sent instead of the Default Welcome Email, after account confirmation.

Email template chosen based on theme fallback when "Default" option is selected.

Generate Human-Friendly Customer ID


No

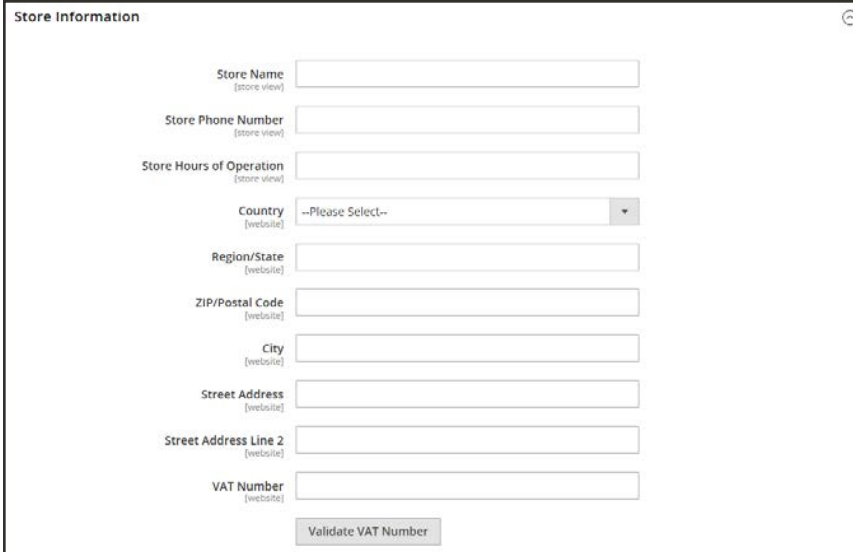
#### Create New Account Options

5. Set **Enable Automatic Assignment to Customer Group** to “Yes.” Then complete the following fields as needed.

- Default Group
  - Default Value for Disable Automatic Group Changes Based on VAT ID
  - Show VAT Number on Frontend
6. When complete, tap **Save Config.**

#### Step 4: Set Your VAT ID and Location Country

1. On the Admin sidebar, tap **Stores**. Under **Settings**, choose **Configuration**.
2. If needed, set **Store View** to the applicable store view.
3. In the panel on the left under **General**, choose **General**.
4. Expand  the **Store Information** section. Then, do the following:



The screenshot shows the 'Store Information' configuration panel. It contains the following fields and controls:

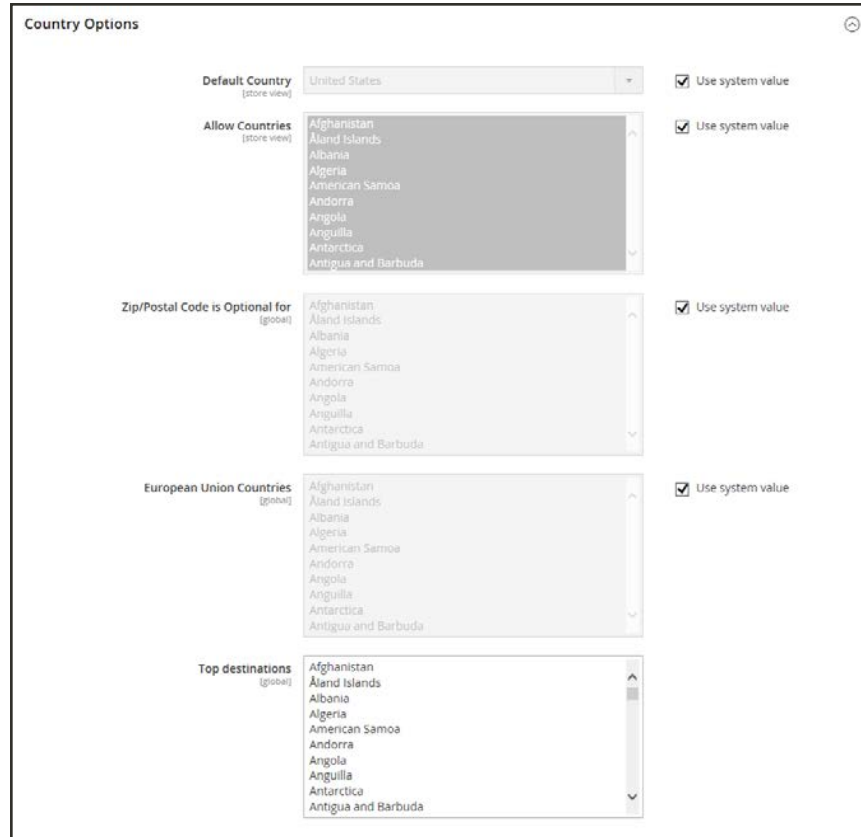
- Store Name** (store view): Text input field.
- Store Phone Number** (store view): Text input field.
- Store Hours of Operation** (store view): Text input field.
- Country** (website): Dropdown menu with the placeholder text '--Please Select--'.
- Region/State** (website): Text input field.
- ZIP/Postal Code** (website): Text input field.
- City** (website): Text input field.
- Street Address** (website): Text input field.
- Street Address Line 2** (website): Text input field.
- VAT Number** (website): Text input field.
- Validate VAT Number**: A button located below the VAT Number field.

#### *Store Information*

- a. Select your **Country**.
  - b. Enter your **VAT Number**. Then, tap **Validate VAT Number**. The result appears immediately.
5. When complete, tap **Save Config.**

## Step 5: Verify the List of EU Member Countries

1. Continuing in the General configuration section, expand  the **Countries Options** section.



### *Countries Options*

2. In the list of **European Union Countries**, verify that each member country of the EU is selected.
3. When complete, tap **Save Config.**

## Tax Quick Reference

Some tax settings have a choice of options that determines the way the tax is calculated and presented to the customer. To learn more, see: [International Tax Guidelines](#).

### Tax Calculation Methods

Tax calculation method options include Unit Price, Row Total, and Total. The following table explains how rounding (to two digits) is handled for different settings.

#### Tax Configuration Options

SETTING	CALCULATION AND DISPLAY
Unit Price	Magento calculates the tax for each item and displays prices tax-inclusive. To calculate the tax total, Magento rounds the tax for each item, and then adds them together.
Row Total	Magento calculates the tax for each line. To calculate the tax total, Magento rounds the tax for each line item and then adds them together.
Total	Magento calculates the tax for each item and adds those tax values to calculate the total unrounded tax amount for the order. Magento then applies the specified rounding mode to the total tax to determine the total tax for the order.

## Catalog Prices With or Without Tax

The possible display fields vary depending on the calculation method and whether the catalog prices include or exclude taxes. Display fields have two-decimal precision in normal computations. Some combinations of price settings display prices that both include and exclude tax. When both appear on the same line item, it can be confusing to customers, and triggers a **warning**.

### Tax Configuration Options

SETTING	CALCULATION AND DISPLAY
Excluding Tax	Using this setting, the base item price is used as it is entered and the tax calculation methods are applied.
IncludingTax	Using this setting, the base item price excluding tax is calculated first. This value is used as the base price, and the tax calculation methods are applied.

**Important!** Changes have been made from earlier versions for EU merchants or other VAT merchants who display prices including tax and operate in several countries with multiple store views. If you load prices with more than two digits of precision, Magento automatically rounds all prices to two digits to ensure that a consistent price is presented to buyers.

## Shipping Prices With or Without Tax

### Tax Configuration Options

SETTING	DISPLAY	CALCULATION
Excluding Tax	Appears without tax.	Normal calculation. Shipping is added to cart total, typically displayed as a separate item.
Including Tax	Can be tax inclusive, or tax can be displayed separately.	Shipping is treated as another item in cart with taxes, using the same calculations.

## Tax Amounts as Line Items

To display two different tax amounts as separate line items, such as GST and PST for Canadian stores, you must set different priorities for the related tax rules. However, in previous tax calculations, taxes with different priorities would automatically be compounded. To correctly display separate tax amounts without an incorrect compounding of the tax amounts, you can set different priorities, and also select the Calculate off subtotal only checkbox. This produces correctly calculated tax amounts that appear as separate line items.

# International Tax Guidelines

## U.S. Tax Configuration

TAX OPTION	RECOMMENDED SETTING
Load catalog prices	Excluding tax
FPT	No, because FPT is not taxed.
Tax based on	Shipping origin
Tax Calculation	On total
Tax shipping?	No
Apply Discount	Before tax
Comment	All tax zones are the same priority; ideally, a zone for state and one or more zones for zip code lookup.

## UK B2C Tax Configuration

TAX OPTION	RECOMMENDED SETTING
Load catalog prices	Excluding tax
FPT	Yes, including FPT and description
Tax based on	Shipping address
Tax Calculation	On total
Tax shipping?	Yes
Apply Discount	Before tax, discount on prices, including tax.
Comment	For merchants marking up supplier invoices (including VAT).

## U.K. B2B Tax Configuration

TAX OPTION	RECOMMENDED SETTING
Load catalog prices	Excluding tax
FPT	Yes, including FPT and description
Tax based on	Shipping address
Tax Calculation	On item

**U.K. B2B Tax Configuration (cont.)**

TAX OPTION	RECOMMENDED SETTING
Tax shipping?	Yes
Apply Discount	Before tax, discount on prices, including tax.
Comment	For B2B merchants to provide simpler VAT supply chain considerations. Tax calculation on row is also valid; however, check with your taxing jurisdiction. Setup assumes a merchant is in the supply chain and that goods sold are used by other vendors for VAT rebates and so on. This makes it easy to discern tax by item for faster rebate generation. Note that some jurisdictions require different rounding strategies not currently supported by Magento, and that not all jurisdictions allow item or row level tax.

**Canada Tax Configuration**

TAX OPTION	RECOMMENDED SETTING
Load catalog prices	Excluding tax
FPT	Yes, including FPT, description, and apply tax to FPT.
Tax based on	Shipping origin
Tax Calculation	On total
Tax shipping?	Yes
Apply Discount	Before tax
Comment	<p>Merchants located in a GST/PST province (Montreal) should create one tax rule and show a combined tax amount.</p> <p>Be sure to consult a qualified tax authority if you have any questions. For information about the tax requirements of specific provinces, see the following:</p> <p><a href="#">Revenu Québec</a></p> <p><a href="#">Government of Saskatchewan</a></p> <p><a href="#">Manitoba Information for Vendors</a></p>

## U.S. Tax Guidelines

These recommended settings can be used for most tax configurations for stores within the United States.

### Tax Classes

TAX CLASS	RECOMMENDED SETTING
Tax Class for Shipping	None

### Calculation Settings

CALCULATION	RECOMMENDED SETTING
Tax Calculation Method Based On	Total
Tax Calculation Based On	Shipping Origin
Catalog Prices	Excluding Tax
Shipping Prices	Excluding Tax
Apply Customer Tax	After Discount
Apply Discount on Prices	Excluding Tax

### Default Tax Destination Calculation

SETTING	RECOMMENDED SETTING
Default Country	United States
Default State	State where business is located.
Default Post Code	The postal code that is used in your tax zones.

### Price Display Settings

SETTING	RECOMMENDED SETTING
Display Product Prices in Catalog	Excluding Tax
Display Shipping Prices	Excluding Tax

### Shopping Cart Display Settings

SETTING	RECOMMENDED SETTING
Display Prices	Excluding Tax
Display Subtotal	Excluding Tax



SETTING	RECOMMENDED SETTING
Display Shipping Amount	Excluding Tax
Display Gift Wrapping Prices	Excluding Tax
Display Printed Card Prices	Excluding Tax
Include Tax in Grand Total	Yes
Display Full Tax Summary	Yes
Display Zero Tax Subtotal	Yes

### Orders, Invoices, Credit Memos, Display Settings

SETTING	RECOMMENDED SETTING
Display Prices	Excluding Tax
Display Subtotal	Excluding Tax
Display Shipping Amount	Excluding Tax
Include Tax in Grand Total	Yes
Display Full Tax Summary	Yes
Display Zero Tax Subtotal	Yes

### Fixed Product Taxes

SETTING	RECOMMENDED SETTING
Enable FPT	No, except in California.

## Canadian Tax Guidelines

The following example shows how to set up GST tax rates for Canada and PST tax rates for Saskatchewan, with tax rules that calculate and display the two tax rates. Because this is an example configuration, be sure to verify the correct tax rates and rules for your tax jurisdictions. When setting up taxes, set the store scope to apply the configuration to all applicable stores and websites.

- Fixed product tax is included for relevant goods as a product attribute.
- In Quebec, PST is referred to as TVQ. If you need to set up a rate for Quebec, make sure to use TVQ as the identifier.

### Process Overview:

Step 1: [Complete the Tax Calculation Settings](#)

Step 2: [Set Up Canadian Goods & Services Tax \(GST\)](#)

Step 3: [Set Up Canadian Provincial Sales Tax \(PST\)](#)

Step 4: [Create a GST Tax Rule](#)

Step 5: [Create a PST Tax Rule for Saskatchewan](#)

Step 6: [Save and Test the Results](#)

### Step 1: Complete Tax Calculation Settings

1. On the Admin menu, select **System > Configuration**. Then in the panel on the left, under Sales, select **Tax**.
2. Click to expand each section, and complete the following settings:

#### Tax Calculation Settings

FIELD	RECOMMENDED SETTING
Tax Calculation Method Based On	Total
Tax Calculation Based On	Shipping Address
Catalog Prices	Excluding Tax
Shipping Prices	Excluding Tax
Apply Customer Tax	After Discount
Apply Discount on Prices	Excluding Tax
Apply Tax On	Custom Price (if available)

**Tax Classes**

FIELD	RECOMMENDED SETTING
Tax Class for Shipping	Shipping (shipping is taxed)

**Default Tax Destination Calculation**

FIELD	RECOMMENDED SETTING
Default Country	Canada
Default State	(as appropriate)
Default Postal Code	* (asterisk)

**Shopping Cart Display Settings**

FIELD	RECOMMENDED SETTING
Include Tax in Grand Total	Yes
Display Full Tax Summary	Yes
Display Zero in Tax Subtotal	Yes

**Fixed Product Taxes**

FIELD	RECOMMENDED SETTING
Enable FPT	Yes
All FPT Display Settings	Including FPT and FPT description
Apply Discounts to FPT	No
Apply Tax to FPT	Yes
Include FPT in Subtotal	No

## Step 2: Set Up Canadian Goods & Services Tax (GST)

To print the GST number on invoices and other sales documents, include it in the name of the applicable tax rates. The GST will appear as part of the GST amount on any order summary.

### Manage Tax Zones & Rates

FIELD	RECOMMENDED SETTING
Tax Identifier	Canada-GST
Country	Canada
State	* (asterisk)
Zip/Post is Range	No
Zip/Post Code	* (asterisk)
Rate Percent	5.0000

## Step 3: Set Up Canadian Provincial Sales Tax (PST)

Set up another tax rate for the applicable province.

### Tax Rate Information

FIELD	RECOMMENDED SETTING
Tax Identifier	Canada-SK-PST
Country	Canada
State	Saskatchewan
Zip/Post is Range	No
Zip/Post Code	* (asterisk)
Rate Percent	5.0000

### Step 4: Create a GST Tax Rule

To avoid compounding the tax and to correctly display the calculated tax as separate line items for GST and PST, you must set different priorities for each rule, and select the “Calculate off subtotal only” checkbox. Each tax appears as a separate line item, but the tax amounts are not compounded.

#### Tax Rule Information

FIELD	RECOMMENDED SETTING
Name	Retail-Canada-GST
Customer Tax Class	Retail Customer
Product Tax Class	Taxable Goods Shipping
Tax Rate	Canada-GST
Priority	0
Calculate off subtotal only	Select this checkbox.
Sort Order	0

### Step 5: Create a PST Tax Rule for Saskatchewan

For this tax rule, make sure to set the priority to 0 and select the "Calculate off subtotal only" checkbox. Each tax appears as a separate line item, but the tax amounts are not compounded.

#### Tax Rule Information

FIELD	RECOMMENDED SETTING
Name	Retail-Canada-PST
Customer Tax Class	Retail Customer
Product Tax Class	Taxable Goods Shipping
Tax Rate	Canada-SK-PT
Priority	1
Calculate off subtotal only	Select this checkbox.
Sort Order	0

### Step 6: Save and Test the Results

1. When complete, click the **Save Config** button.
2. Return to your storefront, and create a sample order to test the results.

## EU Tax Guidelines

The following example depicts a store based in France that sells > 100k Euros in France and > 100k Euros in Germany.

- Tax calculations are managed at the website level.
- Currency conversion and tax display options are controlled individually at the store view level, (Click the Use Website checkbox to override the default).
- By setting the default tax country you can dynamically show the correct tax for the jurisdiction.
- Fixed product tax is included for relevant goods as a product attribute.
- It might be necessary to edit the catalog to ensure that it shows up in the correct category/website/store view.

### Process Overview:

- Step 1: [Create Three Product Tax Classes](#)
- Step 2: [Create Tax Rates for France and Germany](#)
- Step 3: [Set Up the Tax Rules](#)
- Step 4: [Set Up a Store View for Germany](#)
- Step 5: [Configure Tax Settings for France](#)
- Step 6: [Configure Tax Settings for Germany](#)

### Step 1: Create Three Product Tax Classes

For this example, it is assumed that multiple VAT-Reduced product tax classes are not needed.

1. Create a VAT-Standard product tax class.
2. Create a VAT-Reduced product tax class.
3. Create a VAT-Free product tax class.

## Step 2: Create Tax Rates for France and Germany

Create the following tax rates:

### Tax Rates

TAX RATE	SETTING	
France-StandardVAT	Country:	France
	State/Region:	*
	ZIP/Postal Code:	*
	Rate:	20%
France-ReducedVAT	Country:	France
	State/Region:	*
	ZIP/Postal Code:	*
	Rate:	5%
Germany-StandardVAT	Country:	Germany
	State/Region:	*
	ZIP/Postal Code:	*
	Rate:	19%
Germany-ReducedVAT	Country:	Germany
	State/Region:	*
	ZIP/Postal Code:	*
	Rate:	7%





### Step 3: Set Up the Tax Rules

Create the following tax rules:

#### Tax Rules

TAX RULE	SETTING	
Retail-France-StandardVAT	Customer Class:	Retail Customer
	Tax Class:	VAT-Standard
	Tax Rate:	France-StandardVAT
	Priority:	0
	Sort Order:	0
Retail-France-ReducedVAT	Customer Class:	Retail Customer
	Tax Class:	VAT Reduced
	Tax Rate:	France-ReducedVAT
	Priority:	0
	Sort Order:	0
Retail-Germany-StandardVAT	Customer Class:	Retail Customer
	Tax Class:	VAT-Standard
	Tax Rate:	Germany-StandardVAT
	Priority:	0
	Sort Order:	0
Retail-Germany-ReducedVAT	Customer Class:	Retail Customer
	Tax Class:	VAT-Reduced
	Tax Rate:	Germany-ReducedVAT
	Priority:	0
	Sort Order:	0

### Step 4: Set Up a Store View for Germany

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **All Stores**.
2. Under the default website, create a store view for **Germany**. Then, do the following:
  - a. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
  - a. In the upper-left corner, set **Default Config** to the French store.
  - b. On the General page, expand  the **Countries Options** section, and set the default country to “France.”
  - c. Complete the locale options as needed.
3. In the upper-left corner, choose the German **Store View**. Then, do the following:
  - a. On the General page, expand  **Countries Options**, and set the default country to “Germany.”
  - b. Complete the locale options as needed.

### Step 5: Configure Tax Settings for France

Complete the following General tax settings:

#### General Settings

FIELD	RECOMMENDED SETTING
<b>TAX CLASSES</b>	
Tax Class for Shipping	Shipping (shipping is taxed)
<b>CALCULATION SETTINGS</b>	
Tax Calculation Method Based On	Total
Tax Calculation Based On	Shipping Address
Catalog Prices	Including Tax
Shipping Prices	Including Tax
Apply Customer Tax	After Discount
Apply Discount on Prices	Including Tax

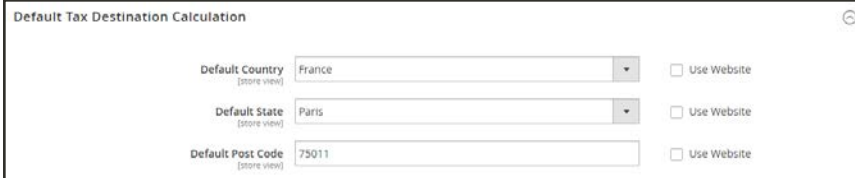
**General Settings (cont.)**

FIELD	RECOMMENDED SETTING
Apply Tax On	Custom Price (if available)
<b>DEFAULT TAX DESTINATION CALCULATION</b>	
Default Country	France
Default State	
Default Postal Code	* (asterisk)
<b>SHOPPING CART DISPLAY SETTINGS</b>	
Include Tax in Grand Total	Yes
<b>FIXED PRODUCT TAXES</b>	
Enable FPT	Yes
All FPT Display Settings	Including FPT and FPT description
Apply Discounts to FPT	No
Apply Tax to FPT	Yes
Include FPT in Subtotal	Yes

## Step 6: Configure Tax Settings for Germany

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the upper-right corner, set **Store View** to the view to the German store. When prompted to confirm, tap **OK**.
3. In the panel on the left, under **Sales**, choose **Tax**.
4. In the **Default Tax Destination Calculation** section, do the following:
  - a. Clear the **Use Website** checkbox after each field,
  - b. Update the following values to match your site's Shipping Settings **point of origin**.
    - Default Country
    - Default State
    - Default Post Code

This setting ensures that tax is calculated correctly when product prices include tax.

A screenshot of the 'Default Tax Destination Calculation' configuration panel. It contains three rows of settings. The first row is 'Default Country' with a dropdown menu showing 'France' and a 'Use Website' checkbox. The second row is 'Default State' with a dropdown menu showing 'Paris' and a 'Use Website' checkbox. The third row is 'Default Post Code' with a text input field containing '75011' and a 'Use Website' checkbox. All three 'Use Website' checkboxes are unchecked. The panel has a title bar at the top and a close button in the top right corner.

Default Tax Destination Calculation	
Default Country <small>(store view)</small>	France <input type="checkbox"/> Use Website
Default State <small>(store view)</small>	Paris <input type="checkbox"/> Use Website
Default Post Code <small>(store view)</small>	75011 <input type="checkbox"/> Use Website

*Default Tax Destination Calculation*

5. When complete, tap **Save Config.**

## Warning Messages

Some combinations of tax-related options might be confusing to customers and trigger a warning. These conditions might occur when the tax calculation method is set to “Row” or “Total,” and the customer is presented with prices that both exclude and include tax, or a tax on an item basis in the cart. Because the tax calculation is rounded, the amount that appears in the cart might differ from the amount that a customer expects to pay.

If your tax calculation is based on a problematic configuration, the following warnings appear:



**Warning.** Tax discount configuration might result in different discounts than a customer might expect for store(s); Europe Website (French), Europe Website (German). Please see source for more details.



**Warning.** Tax configuration can result in rounding errors for store(s): Europe Websites (French), Europe Websites (German).

## Calculation Settings

Use the following tables for reference when configuring tax calculation settings:

### Tax Calculation Method Based On: Excluding Tax

#### Tax Excluded

PRICE DISPLAY	UNIT PRICE	ROW TOTAL	TOTAL
Tax Class for Shipping Shipping (is taxed)			
Excluding tax	OK	OK	OK
Including tax	OK	OK	OK
Including and Excluding tax	OK	OK	<b>Warning</b>

### Catalog Prices: Including Tax

#### Tax Included

PRICE DISPLAY	UNIT PRICE	ROW TOTAL	TOTAL
Excluding tax	OK	OK	OK
Including tax	OK	OK	OK
Including and Excluding tax	OK	<b>Warning</b>	<b>Warning</b>

Calculation Settings

Tax Calculation Method Based On

Total

[WEBSITE]

Tax Calculation Based On

Shipping Address

[WEBSITE]

Catalog Prices

Excluding Tax

[WEBSITE]

This sets whether catalog prices entered from Magento Admin include tax.

Shipping Prices

Excluding Tax

[WEBSITE]

This sets whether shipping amounts entered from Magento Admin or obtained from gateways include tax.

Apply Customer Tax

After Discount

[WEBSITE]

Apply Discount On Prices

Excluding Tax

[WEBSITE]

Apply discount on price including tax is calculated based on store tax if "Apply Tax after Discount" is selected.

Apply Tax On

Custom price if available

[WEBSITE]

Enable Cross Border Trade

No

[WEBSITE]

When catalog price includes tax, enable this setting to fix the price no matter what the customer's tax rate.

Calculation Settings

## Discount Settings

We strongly recommend that you use the following settings to avoid issues when configuring taxes in relation to discounts.

### Recommended Settings

FIELD	RECOMMENDED SETTING	
Apply Customer Tax	After Discount	
Apply Discount on Prices	US and Canada	Excluding Tax
	EU	Including Tax



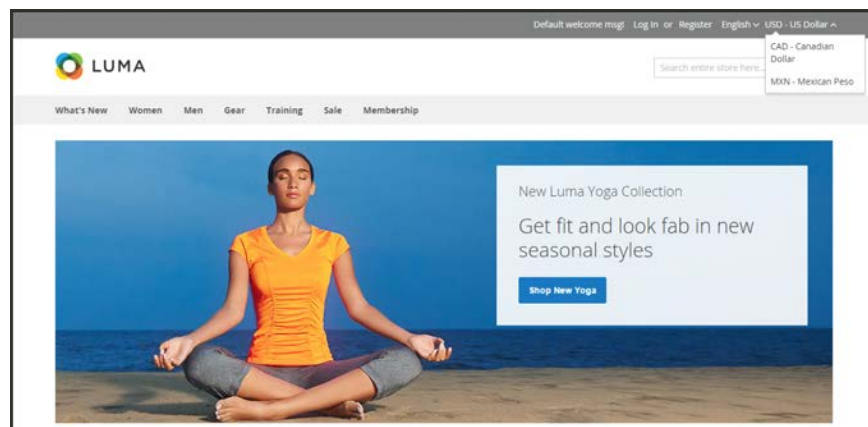
## CHAPTER 85:

# Currency

Magento Commerce gives you the ability to accept currencies from more than two hundred countries around the world. If the store supports multiple currencies, a Currency Chooser appears in the header after currency rates are **updated**.

If you accept payment in multiple currencies, make sure to monitor the currency rate settings, because any fluctuation can impact your profit margin.

Currency symbols appear in product prices and sales documents such as orders and invoices. You can customize the currency symbols as needed, and also set the display of the price separately for each store or view.

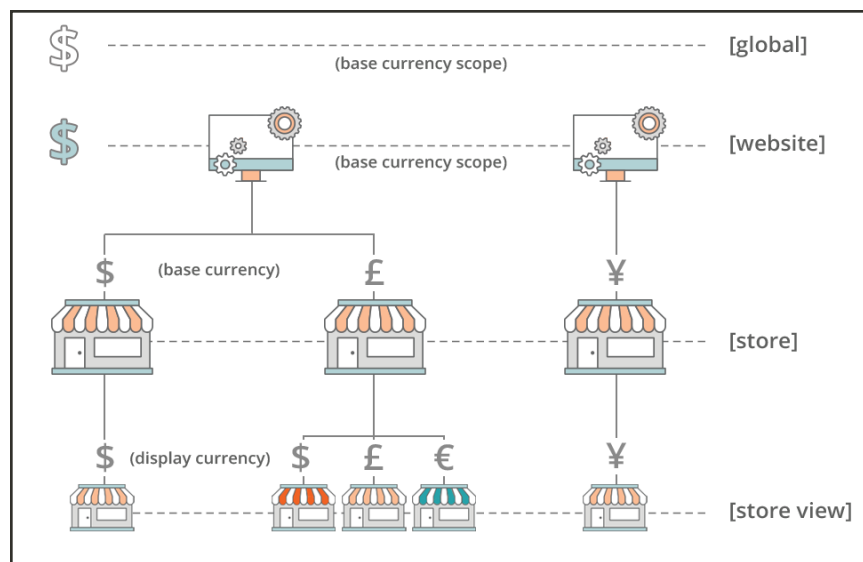


*Currency Chooser*

## Currency Configuration

Before setting up individual currency rates, you must first set the scope of the **base currency**. By default, it is set to global, which applies the base currency setting to the entire **store hierarchy**. If you have a multisite installation of Magento, you can manage multiple base currencies by setting the scope to the website level.

Then, specify which currencies you accept, and the currency that you want to use for the display of **prices** in your store. In the following illustration, the scope of the base currency is set at the website level, so each website can have a different base currency.



*Scope of Base Currency*

### Process Overview:

- Step 1: **Choose the Accepted Currencies**
- Step 2: **Configure the Import Connection**
- Step 3: **Configure the Scheduled Import Settings**
- Step 4: **Update the Currency Rates**



## Step 1: Choose the Accepted Currencies

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Currency Setup**.
3. Expand ☑ the **Currency Options** section, and do the following:
  - a. Set **Base Currency** to the primary currency that you use for online transactions.
  - b. Set **Default Display Currency** to the currency that you use to display pricing in your store.
  - c. In the **Allowed Currencies** list, select all currencies that you accept as payment in your store. Make sure to also select your primary currency. (For multiple currencies, hold down the Ctrl key and select each option.)

**Currency Options**

**Base Currency** (website) US Dollar ☒ Use system value  
Base currency is used for all online payment transactions. The base currency scope is defined by the catalog price scope ("Catalog" > "Price" > "Catalog Price Scope").

**Default Display Currency** (store view) US Dollar ☒ Use system value

**Allowed Currencies** (store view) ☒ Use system value

- Alghani Afghani
- Albanian Lek
- Algerian Dinar
- Angolan Kwanza
- Argentine Peso
- Armenian Dram
- Aruban Florin
- Australian Dollar
- Azerbaijani Manat
- Azerbaijani Manat (1993-2006)

*Currency Options*


4. When prompted to refresh the cache, tap the **Close** ✕ box in the upper-right corner of the system message. We'll refresh the cache later.
5. To define the scope of the base currency, do the following:
  - a. In the panel on the left under **Catalog**, choose **Catalog**. Then, scroll down and expand ☑ the **Price** section.
  - b. Set **Catalog Price Scope** to either "Global" or "Website."

**Price**

**Catalog Price Scope** (global) Global ☒ Use system value  
This defines the base currency scope ("Currency Setup" > "Currency Options" > "Base Currency").

*Price*


## Step 2: Configure the Import Connection

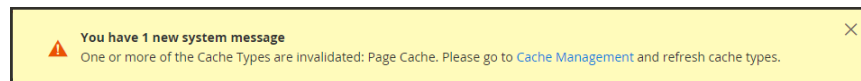
1. Scroll back up to the top of the page. In the panel on the left under **General**, choose **Currency Setup**.
2. Expand  the **WebserviceX** section.
3. In the **Connection Timeout in Seconds** field, enter the number of seconds of inactivity to allow before the connection times out.



*WebserviceX*

## Step 3: Configure the Scheduled Import Settings

1. Continuing with Currency Setup, expand  the **Scheduled Import Settings** section.
2. To automatically update currency rates, set **Enabled** to "Yes." Then, do the following:
  - a. Set **Service** to the rate provider. The default value is "Webservicex."
  - b. Set **Start Time** to the hour, minute, and second that the rates will be updated according to the schedule.
  - c. To determine how often the rates are updated, set **Frequency** to one of the following:
    - Daily
    - Weekly
    - Monthly
  - d. In the **Error Email Recipient** field, enter the email address of the person who is to receive email notification if an error occurs during the import process. To enter multiple email addresses, separate each with a comma.
  - e. Set **Error Email Sender** to the **store contact** that appears as the sender of the error notification.
  - f. Set **Error Email Template** to the email template used for the error notification.
3. When complete, tap **Save Config.**
4. When prompted to update the cache, tap the **Cache Management** link. Then, refresh the invalid cache.



### *Refresh Cache*

A form titled "Scheduled Import Settings" with a close button in the top right. The form contains several fields: "Enabled" (dropdown menu with "No" selected, and a checkbox "Use system value" which is checked), "Service" (dropdown menu with "Yahoo Finance Exchange" selected), "Start Time" (three dropdown menus showing "00", "00", and "00"), "Frequency" (dropdown menu with "Daily" selected), "Error Email Recipient" (text input field), "Error Email Sender" (dropdown menu with "General Contact" selected, and a checkbox "Use system value" which is checked), and "Error Email Template" (dropdown menu with "Currency Update Warnings (Default)" selected, and a checkbox "Use system value" which is checked). Below the "Error Email Template" dropdown, there is a small note: "Email template chosen based on theme fallback when 'Default' option is selected."

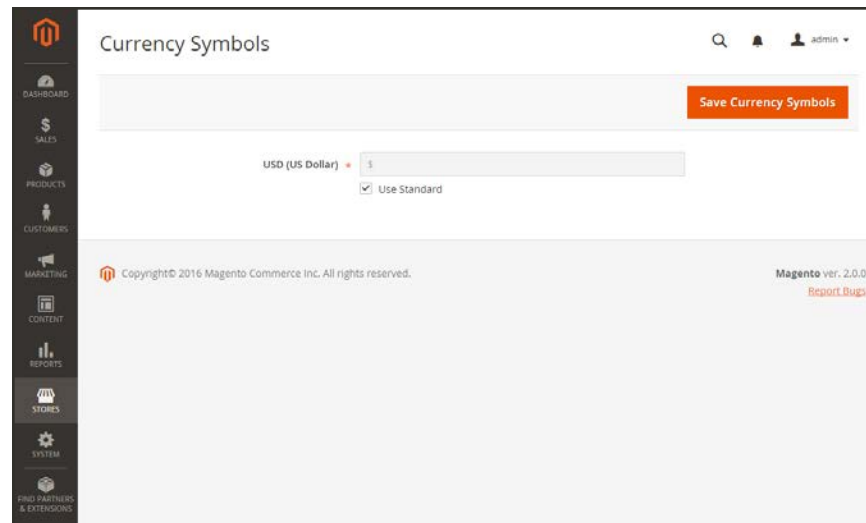
### *Scheduled Import Settings*

## Step 4: Update the Currency Rates

The currency rates must be updated with the current values before they go into effect. Follow the instructions to **update the rates** manually or to import the rates automatically.

## Currency Symbols

Manage Currency Symbols gives you the ability to customize the symbol associated with each currency that is accepted as payment in your store.



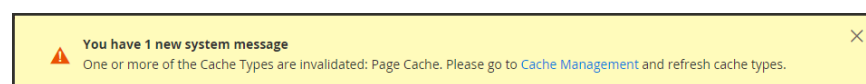
*Currency Symbols*

### To customize currency symbols:

1. On the Admin sidebar, tap **Stores**. Then under **Currency**, choose **Currency Symbols**.  
Each currency that is currently enabled for your store appears in the Currency list.
2. Enter a custom symbol for each currency you want to use, or mark the **Use Standard** checkbox to the right of each currency.
3. To override the default symbol, clear the **Use Standard** checkbox. Then, enter the symbol that you want to use.

It is not possible to change the alignment of the currency symbol from left to right.

4. When complete, tap **Save Currency Symbols**.
5. When prompted to update the cache, tap the **Cache Management** link. Then, refresh any invalid cache.

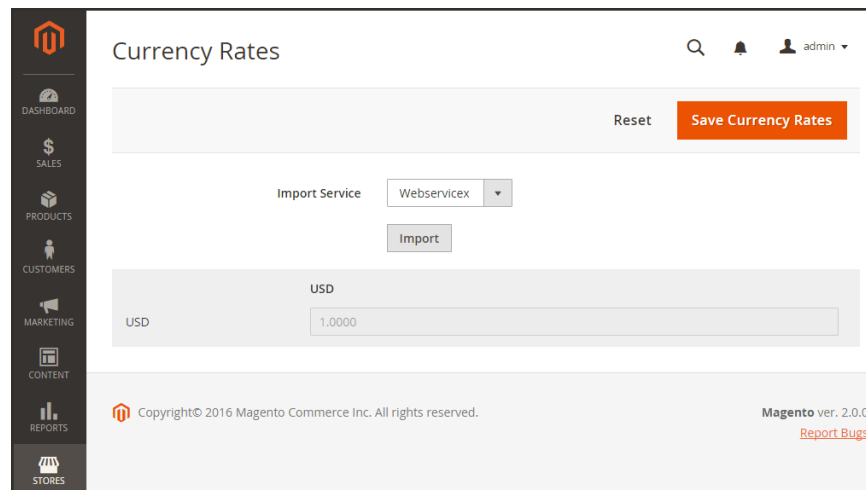


*Refresh Cache*

## Updating Currency Rates

Currency rates can be set manually, or imported into the store. To ensure that your store has the most current rates, you can configure the currency rates to be updated automatically on schedule.

Before importing currency rates, complete the [Currency Rate Setup](#) to specify the currencies that you accept, and to establish the import connection and schedule.



*Updating Currency Rates*

### To manually update a currency rate:

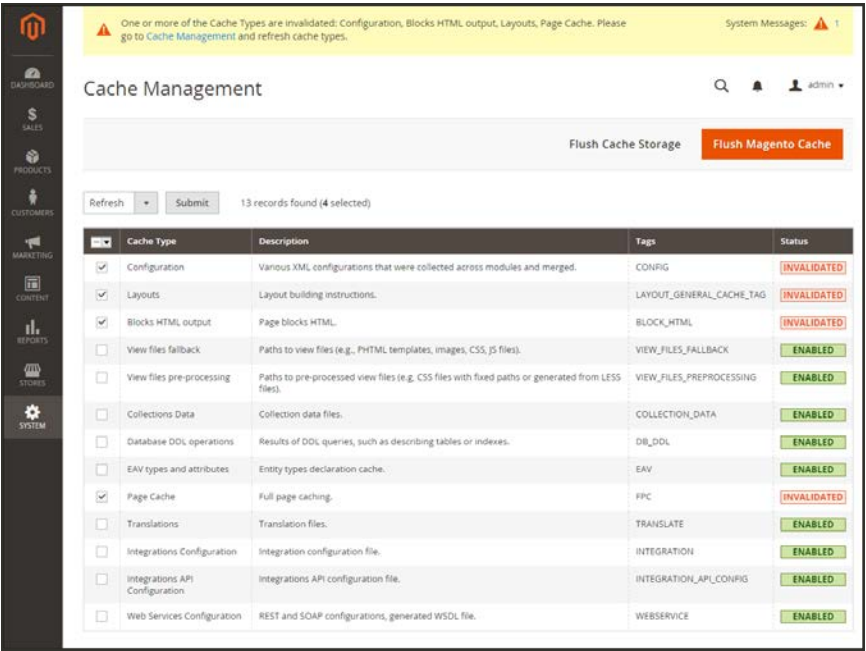
1. On the Admin sidebar, click **Stores**. Then under **Currency**, choose **Currency Rates**.
2. Tap the rate you want to change, and enter the new value for each currency supported.
3. When complete, tap **Save Currency Rates**.

### To import currency rates:

1. On the Admin sidebar, tap **Stores**. Then under **Currency**, choose **Currency Rates**.
2. Set **Import Service** to the currency rate provider. WebserviceX is the default provider.
3. Tap **Import**.

The updated rates appear in the Currency Rates list. If the rates have changed since the last update, the old rate appears below for reference.

4. When complete, tap **Save Currency Rates**.
5. When prompted to update the cache, tap the **Cache Management** link. Then, refresh all invalid caches.



Refresh Invalid Caches

To import currency rates on schedule:

- 1. Make sure that Cron is enabled for your store.
- 2. Complete the Currency Rate Setup to specify the currencies that you accept, and to establish the import connection and schedule.
- 3. To verify that the rates are imported on schedule, check the Currency Rates list. Then, wait for the duration of the frequency setting established for the schedule, and check the rates again.



## CHAPTER 86:

# Attributes

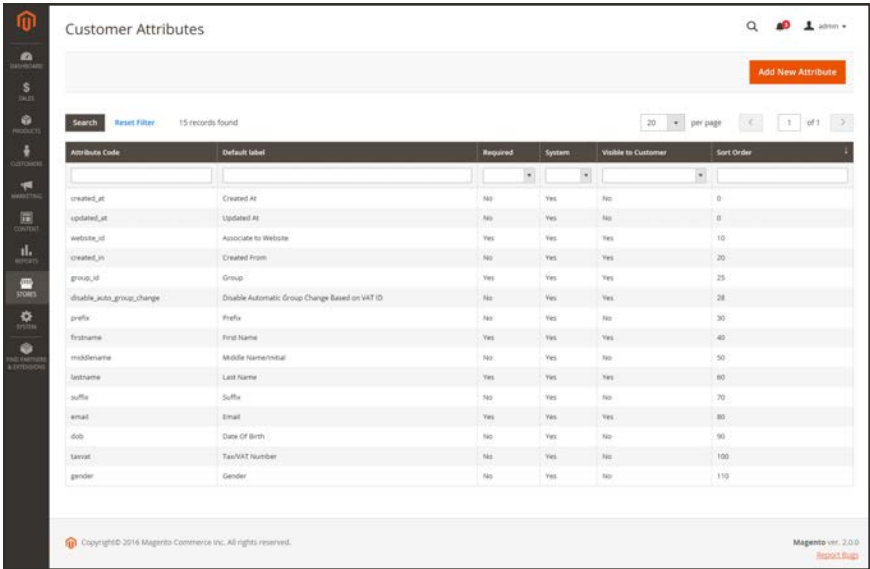
Magento uses attributes to manage the information associated with products, customers, and product ratings. Attributes are pieces of information that might appear as fields in forms, reports, product reviews, [layered navigation](#), and email messages. Some attributes are built into the system, and others can be created to address specific needs.

You can find more information about attributes in the [Products](#) and [Data Transfer](#) sections of this guide. To learn more, see:

- [Using Product Attributes](#)
- [Product Attribute Reference](#)
- [Customer Attribute Reference](#)

# Customer Attributes

Magento’s customer attributes provide the information required to support the order, fulfillment, and customer management processes. Because your business is unique, you might need fields in addition to those provided by the system. You can add custom attributes to the Account Information, Address Book, and Billing Information sections of the customer’s account. Customer **address attributes** can also be used in the Billing Information section during checkout, or when guests register for an account.

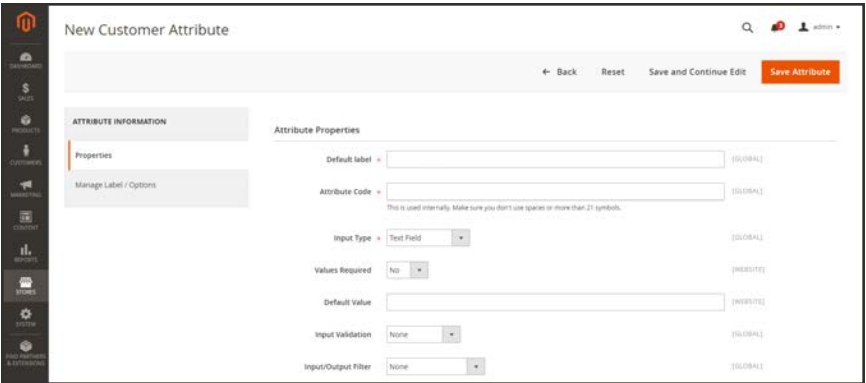


Attribute Code	Default label	Required	System	Visible to Customer	Sort Order
created_at	Created At	No	Yes	No	0
updated_at	Updated At	No	Yes	No	0
website_id	Associate to Website	Yes	Yes	Yes	10
created_in	Created From	No	Yes	Yes	20
group_id	Group	Yes	Yes	Yes	25
disable_auto_group_change	Disable Automatic Group Change Based on VAT ID	No	Yes	Yes	28
prefix	Prefix	No	Yes	No	30
firstname	First Name	Yes	Yes	Yes	40
middlename	Middle Name/Initial	No	Yes	No	50
lastname	Last Name	Yes	Yes	Yes	60
suffix	Suffix	No	Yes	No	70
email	Email	Yes	Yes	Yes	80
dob	Date Of Birth	No	Yes	No	90
taxvat	Tax/VAT Number	No	Yes	No	100
gender	Gender	No	Yes	No	110

Customer Attributes

## Step 1: Complete the Attribute Properties

1. On the Admin sidebar, tap **Stores**. Then under **Attributes**, choose **Customer**.



ATTRIBUTE INFORMATION

Attribute Properties

Properties

Manage Label / Options

Default label

Attribute Code

This is used internally. Make sure you don't use spaces or more than 21 symbols.

Input Type

Text Field

Values Required

No

Default Value

Input Validation

None

Input/Output Filter

None

Customer Attribute Properties

2. In the **Attribute Properties** section, do the following:



- a. Enter a **Default Label** to identify the attribute during data entry.
- b. Enter an **Attribute Code** to identify the attribute within the system.

The attribute code must begin with a letter, and can include any combination of lowercase letters (a-z) and numbers (0-9). The code must be less than thirty characters in length, and cannot include special characters or spaces. The underscore character ( \_ ) can be used to indicate a space.

**Shortcut:** To complete only the required fields at this time, scroll down to Storefront Properties, enter the Sort Order, and save.

3. Complete the following:

### Data Entry Properties

1. To determine the type of input control that is used for data entry, set **Input Type** to one of the following:
2. If the customer must enter a value in the field, set **Values Required** to “Yes.”
3. Enter a **Default Value** to assign an initial value to the field.
4. To check the data entered into the field for accuracy before saving the record, set **Input Validation** to the type of data that should be entered into the field.
5. To limit the size of Text Field and Text Area input types, enter the **Minimum Text Length** and **Maximum Text Length**.
6. To apply a filter to a Text Field, Text Area, or Multiple Line input type, set **Input/Output Filter** to one of the following:

None	Does not apply a filter to text entered into the field.
Strip HTML Tags	Removes HTML tags from the text. This filter can help clean up data that is pasted into a field from another source that includes HTML tags.
Escape HTML Entities	Converts special characters found in the text to a valid HTML escape sequence, such as & .Escape sequences are enclosed between an ampersand and a semi-colon, and are frequently used for typographer’s smart quotes, copyright and trademark symbols. Escape sequences are also used to identify characters such as the less than (<) and greater than (>) symbols, and the ampersand character which are also used in the code. This filter can help clean up special characters that are sometimes pasted into database fields from word processors.

A screenshot of the 'Data Entry Properties' configuration form. It contains five rows of settings: 'Input Type' is set to 'Text Field' with a '[GLOBAL]' scope; 'Values Required' is set to 'No' with a '[WEBSITE]' scope; 'Default Value' is an empty text field with a '[WEBSITE]' scope; 'Input Validation' is set to 'None' with a '[GLOBAL]' scope; and 'Input/Output Filter' is set to 'None' with a '[GLOBAL]' scope.

*Data Entry Properties*

**Customers Grid Properties**

1. To be able to include the column in the Customers grid, set **Add to Column Options** to “Yes.”
2. To filter the Customers grid by this attribute, set **Use in Filter Options** to “Yes.”
3. To search the Customers grid by this attribute, set **Use in Search Options** to “Yes.”
4. To make this attribute available to **customer segments**, set **Use in Customer Segment** to “Yes.”

**Step 2: Complete the Storefront Properties**

1. To make the attribute visible to customers, set **Show on Storefront** to “Yes.”
2. Enter a number in the **Sort Order** field to determine its order of appearance when listed with other attributes.
3. Set **Forms to Use** to each form that is to include the attribute. To choose multiple options, hold the Ctrl key down and click each form.
  - **Customer Registration**
  - Customer Account Edit
  - Admin Checkout

A screenshot of the 'Storefront Properties' configuration form. It contains three rows of settings: 'Show on Storefront' is set to 'No' with a '[WEBSITE]' scope; 'Sort Order' is an empty text field with a '[GLOBAL]' scope; and 'Forms to Use In' is a multi-select dropdown menu with '[GLOBAL]' scope, currently showing 'Customer Registration', 'Customer Account Edit', and 'Admin Checkout' as selected options.

*Storefront Properties*

### Step 3: Complete the Labels/Options

1. In the panel on the left, choose **Manage Labels/Options**.
2. Under **Manage Titles**, enter a label to identify the attribute for each **store view**.
3. When complete, tap **Save Attribute**.



*Manage Labels/Options*

### Default Customer Attributes

ATTRIBUTE CODE	DESCRIPTION
created_at	The date the customer account was created.
updated_at	The date the customer account was last updated.
website_id	The website ID of the site where the customer account was created.
created_in	The store view where the account was created.
group_id	The ID of the customer group where the customer is assigned.
disable_auto_group_change	Determines if customer groups can be dynamically assigned during <b>VAT ID validation</b> .
prefix	Any prefix that is used with the customer name.(Mr., Ms., Mrs., Dr., etc.)
firstname	The first name of the customer.
middlename	The middle name or middle initial of the customer.
lastname	The last name of the customer.

**Default Customer Attributes (cont.)**

ATTRIBUTE CODE	DESCRIPTION
suffix	Any suffix that is used with the customer name. (Jr., Sr., Esquire, etc.)
email	The customer's email address.
dob	The customer's date of birth.
taxvat	The Value Added Tax (VAT) ID that is assigned to the customer. The default label of this attribute is "VAT Number.". The VAT number field is always present in all shipping and billing customer addresses when viewed from the Admin, but is not a required field.
gender	The customer gender.

## Customer Address Attributes

Custom address attributes can be set up if you need to provide additional information such as an optional email address, Skype account, alternate phone number, building, or county. The custom attribute can then be incorporated into the **address template** that is used to produce sales documents. The process to create a custom address attribute is almost the same as creating a **customer attribute**. Customer address attributes can be used in the following forms:

- **Customer Registration**
- **Address Book**
- **Customer Billing and Shipping Address**

### To create a new customer address attribute:

1. On the Admin sidebar, tap **Stores**. Then under **Attributes**, choose **Customer Address**.
2. In the upper-right corner, tap **Add New Rating**.
3. Follow the same process as you would to create a **customer attribute**.

The screenshot shows the 'New Customer Address Attribute' form. The left sidebar contains navigation icons for various Magento features. The main content area is titled 'New Customer Address Attribute' and includes a search bar and user profile in the top right. Below the title are navigation links: 'Back', 'Reset', 'Save and Continue Edit', and 'Save Attribute'. The form is organized into two main sections: 'ATTRIBUTE INFORMATION' and 'Attribute Properties'. The 'Attribute Properties' section contains the following fields and options:

- Default label**: Text input field.
- Attribute Code**: Text input field with a note: 'This is used internally. Make sure you don't use spaces or more than 30 symbols.'
- Input Type**: Dropdown menu set to 'Text Field'.
- Values Required**: Dropdown menu set to 'No'.
- Default Value**: Text input field.
- Input Validation**: Dropdown menu set to 'None'.
- Input/Output Filter**: Dropdown menu set to 'None'.
- Add to Column Options**: Dropdown menu set to 'No'.
- Use in Filter Options**: Dropdown menu set to 'No'.
- Use in Search Options**: Dropdown menu set to 'No'.
- Use in Customer Segment**: Dropdown menu set to 'No'.
- Storefront Properties**:
  - Show on Storefront**: Dropdown menu set to 'No'.
  - Sort Order**: Text input field.
  - Forms to Use In**: Dropdown menu with selected options: 'Customer Address Registration' and 'Customer Account Address'.

*New Customer Address Attribute Properties*

## Customer Address Templates

You can modify the template that controls the format of customer billing and shipping addresses that appear on printed invoices, shipments, and refunds, as well as in the addresses book of the customer account. If you need to include additional information, you can create **custom attributes** that are associated with the customer account and **address**, and incorporate them into the template.

### Example 1: Short Format

#### For Text One Line Template

```
{{depend prefix}}{{var prefix}} {{/depend}}{{var firstname}} {{depend
middlename}}{{var middlename}} {{/depend}}{{var lastname}}{{depend suffix}}
{{var suffix}}{{/depend}}, {{var street}}, {{var city}}, {{var region}} {{var
postcode}}, {{var country}}
```

### Example 2: Long Format

#### For Text, HTML, and PDF Address Templates

```
{{depend prefix}}{{var prefix}} {{/depend}}{{var firstname}} {{depend
middlename}}{{var middlename}} {{/depend}}{{var lastname}}{{depend suffix}}
{{var suffix}}{{/depend}}{{depend firstname}}<br/>{{/depend}}
{{depend company}}{{var company}}<br />{{/depend}}
{{if street1}}{{var street1}}<br />{{/if}}
{{depend street2}}{{var street2}}<br />{{/depend}}
{{depend street3}}{{var street3}}<br />{{/depend}}
{{depend street4}}{{var street4}}<br />{{/depend}}
{{if city}}{{var city}}, {{/if}}{{if region}}{{var region}}, {{/if}}{{if
postcode}}{{var postcode}}{{/if}}<br/>
{{var country}}<br/>
{{depend telephone}}T: {{var telephone}}{{/depend}}
{{depend fax}}<br/>F: {{var fax}}{{/depend}}
{{depend vat_id}}<br/>VAT: {{var vat_id}}{{/depend}}
```

**Address Templates**

Template Type	Store View	Template Code	Use system value
Text	[store view]	<pre> {{depend prefix}}{{var prefix}} {{/depend}}{{var firstname}} {{depend middlename}}{{var middlename}} {{/depend}}{{var lastname}}{{depend suffix}} {{var suffix}}{{/depend}} {{depend company}}{{var company}}{{/depend}} {{if street1}}{{var street1}} </pre>	<input checked="" type="checkbox"/>
Text One Line	[store view]	<pre> {{depend prefix}}{{var prefix}} {{/depend}}{{var firstname}} {{depend middlename}}{{var middlename}} {{/depend}}{{var lastname}}{{depend suffix}} {{var suffix}}{{/depend}}, {{var street}}, {{var city}}, {{var region}}, {{var postcode}}, {{var country}} </pre>	<input checked="" type="checkbox"/>
HTML	[store view]	<pre> {{depend prefix}}{{var prefix}} {{/depend}}{{var firstname}} {{depend middlename}}{{var middlename}} {{/depend}}{{var lastname}}{{depend suffix}} {{var suffix}}{{/depend}} {{depend company}}&lt;br/&gt;{{/depend}} {{depend company}}{{var company}}&lt;br /&gt; </pre>	<input checked="" type="checkbox"/>
PDF	[store view]	<pre> {{depend prefix}}{{var prefix}} {{/depend}}{{var firstname}} {{depend middlename}}{{var middlename}} {{/depend}}{{var lastname}}{{depend suffix}} {{var suffix}}{{/depend}} {{depend company}}{{var company}} {{/depend}} {{if street1}}{{var street1}} </pre>	<input checked="" type="checkbox"/>

### Address Templates

#### To change the order of address fields:

1. On the Admin sidebar, tap **Stores**. Then under Settings, choose **Configuration**.
2. In the panel on the left, under Customers, select **Customer Configuration**.
3. Click to expand the **Address Templates** section. The section includes a separate set of formatting instructions for each of the following:
  - Text
  - Text One Line
  - HTML
  - PDF
4. Edit each template as needed, using the examples for reference.
5. When complete, tap **Save Config.**

# Product Attributes

Product attribute properties determine how an attribute can be used in the catalog, its appearance and behavior in the store, and in data transfer operations. The properties and labels associated with each attribute determine how it can be used, and its presentation in the store.

- Properties** The Properties section includes both basic and advanced attribute properties.
- Labels** The label identifies an attribute in the Admin and also in the storefront of each store view. If your store is available in multiple languages, you can enter a different translated label for each language.
- Storefront Properties** The Storefront Properties determine how an attribute can be used in your store, its appearance, and behavior. You can specify if attributes are available for search, layered navigation, product comparisons, price rules, and sorting. For text attributes, you can enable the WYSIWYG editor, and determine if HTML tags can be used to format the values.

To learn how to use attributes while creating a product, see: [Using Product Attributes](#).

Attribute Code	Default label	Required	System	Visible	Scope	Searchable	Use in Layered Navigation	Comparable
activity	Activity	No	No	Yes	Global	No	Filterable (with results)	Yes
category_gear	Category Gear	No	No	Yes	Global	No	Filterable (with results)	No
category_ids	Categories	No	Yes	No	Global	No	No	No
climate	Climate	No	No	Yes	Global	No	Filterable (with results)	No
collar	Collar	No	No	Yes	Global	No	Filterable (with results)	No
color	Color	No	No	No	Global	No	Filterable (with results)	No
cost	Cost	No	No	No	Web Site	No	No	No
country_of_manufacture	Country of Manufacture	No	Yes	No	Web Site	No	No	No
custom_design	Custom Design	No	Yes	No	Store View	No	No	No
custom_design_from	Active From	No	Yes	No	Store View	No	No	No

*Product Attributes Page*



## Properties

### Property Descriptions

PROPERTY		DESCRIPTION
<b>ATTRIBUTE PROPERTIES</b>		
Default Label	The label that identifies the attribute during data entry.	
Catalog Input Type for Store Owner	Determines the data type and input control that is used to manage the product from the store Admin. Options include:	
	Text Field	A single line input field for text.
	Text Area	A multiple-line input field that can display paragraphs of text formatted with HTML.
	Date	An input field for date values. The date can be typed directly into the field, or selected from a list or calendar.
	Yes/No	A drop-down list with predefined options of “Yes” and “No.”
	Multiple Select	A drop-down list of options that allows multiple selections. To select more than one option, hold down the Ctrl key and click each item.
	Dropdown	A drop-down list of options that allows only one selection.
	Price	An input type that can be used to create price fields in addition to the predefined attributes: Price, Special Price, Tier Price and Cost.
	Media Image	An additional image that can be included in the attribute set of a product.
	Visual Swatch	Displays a swatch that depicts the color, texture, or pattern of a configurable product. A visual swatch can be filled with a hexadecimal color value, or display an uploaded image that represents the color, material, texture, or pattern of the option.

## Property Descriptions (cont.)

PROPERTY	DESCRIPTION
Text Swatch	A text-based representation of a configurable product option that is frequently used for size. Text swatches can also include hexadecimal color values.
Fixed Product Tax	An input type that gives you the ability to define FPT rates based on the requirements of your locale.
Values Required	To require that a value to be entered in this field before the record can be saved, set Values Required to “Yes.” Options include: Yes / No

## ADVANCED ATTRIBUTE PROPERTIES

Attribute Code	(Required) A unique identifier for internal use. The Attribute Code must begin with a letter, but can include a combination of lowercase letters (a-z) and numbers (0-9). The code must be less than thirty characters in length and cannot include any special characters or spaces, although an underscore ( <code>_</code> ) can be used to indicate a space.
Scope	Limits the use of an attribute to a specific store view or website. Options include: Store View Website Global
Default Value	Assigns a starting value to the attribute to help during data entry. To assign a default value for Multiple Select or Dropdown input types, see: <a href="#">Creating Product Attributes</a> . <div>A default value cannot be set for Multiple Select, Dropdown, or Fixed Product Tax input types.</div>
Unique Value	Requires the attribute value to be different from all other values entered in the same attribute, within the context of the scope setting. Unique value should be enabled for any attribute that is used as an ID number. For example, because SKU is used to identify products throughout the hierarchy, it has a unique value with a global scope. Options: Yes / No
Input Validation for Store Owner	Performs a validation check of the data entered in the field, based on the following options:

**Property Descriptions (cont.)**

PROPERTY	DESCRIPTION
	None
	Decimal Number
	Integer Number
	Email
	URL
	Letters
	Letters (a-z, A-Z) or Numbers (0-9)
Add to Column Options	Determines if the column appears in the product grid. Options: Yes / No
Use in Filter Options	Determines if the attribute is used as a filter control at the top of columns in the grid. Options: Yes / No

**Storefront Properties****Property Descriptions**

PROPERTY	DESCRIPTION				
Use in Search	<p>Select “Yes” if you want people to be able to search the catalog based on the value of this attribute. Options include: Yes / No</p> <p>The following attributes appear when Search is enabled:</p> <table> <tr> <td>Search Weight</td><td>To weight the search results, set Search Weight to a number from 1 to 10.</td></tr> <tr> <td>Visible in Advanced Search</td><td>Gives shoppers the ability to enter search criteria through a form. Options include: Yes / No</td></tr> </table> <div>Using too many attributes can slow down search.</div>	Search Weight	To weight the search results, set Search Weight to a number from 1 to 10.	Visible in Advanced Search	Gives shoppers the ability to enter search criteria through a form. Options include: Yes / No
Search Weight	To weight the search results, set Search Weight to a number from 1 to 10.				
Visible in Advanced Search	Gives shoppers the ability to enter search criteria through a form. Options include: Yes / No				
Comparable on Storefront	Select “Yes” to include this attribute as a row in the Compare Products report. Options include: Yes / No				
Use In Layered Navigation	(Dropdown, Multiple Select and Price input types only) Includes the attribute as a filter in the “Shop By” section of layered navigation. Options include:				

## Property Descriptions (cont.)

PROPERTY	DESCRIPTION	
	No	The attribute is not available to be used as a filter in layered navigation.
	Filterable (with results)	<p>Layered navigation includes only those filters for which matching products can be found. Any attribute value that already applies to all products shown in the list does not appear as an available filter. Attribute values with a count of zero (0) product matches are also omitted from the list of available filters.</p> <p>The filtered list of products includes only those that match the filter. The products list is updated only if the selected filter(s) change what is currently shown.</p>
	Filterable (no results)	Layered navigation includes filters for all available attribute values and their product counts, including those with zero (0) product matches. If the attribute value is a swatch, the value appears as a filter, but is crossed out.
Use In Search Results Layered Navigation	To include the attribute in the layered navigation for search results, select "Yes." Options include: Yes / No	
Position	Determines the position of the attribute in layered navigation in relation to other filterable attributes.	
Use for Promo Rule Conditions	To make the attribute available for use in price rules, select "Yes." Options include: Yes / No	
Allow HTML Tags on Storefront	(Text Field and Text Area input types only) To be able to format the attribute value with HTML tags, select "Yes." Options include: Yes / No	
Visible on Catalog Pages on Storefront	(Simple and virtual products only) To include the attribute on the Additional Information tab of the product page, select "Yes." Options include: Yes / No	
Used in Product Listing	Depends on the theme. To include the attribute in product summaries that appear in catalog listings, select "Yes."	
Used for Sorting in Product Listing	Depending on theme, includes the attribute as a "Sort By" option for catalog listings. Options: Yes / No	

# Creating Product Attributes

Attributes can be created while working on a product, or from the Product Attributes page. The following example shows how to create attributes from the Stores menu. To learn how to add attributes while working on a product, see: [Using Product Attributes](#).

Any attribute that is used as a drop-down list of values for a **configurable product** must have the following properties:

PROPERTY	VALUE
Catalog Input Type for Store Owner	Dropdown
Scope	Global

Dashboard

Sales

Products

Customers

Marketing

Content

Reports

Stores

System

New Product Attribute

← Back

Reset

Save and Continue Edit

Save Attribute

ATTRIBUTE INFORMATION

Properties

Manage Labels

Frontend Properties

Attribute Properties

Attribute Label

Catalog Input Type for Store Owner

Values Required

Advanced Attribute Properties

Attribute Code

Scope

Default Value

Unique Value

Input Validation for Store Owner

New Attribute Properties

**Process Overview:**

- Step 1: [Describe the Basic Properties](#)
- Step 2: [Describe the Advanced Properties](#)
- Step 3: [Enter the Field Label](#)
- Step 4: [Describe the Storefront Properties](#)

## Step 1: Describe the Basic Properties

1. On the Admin sidebar, tap **Stores**. Then under Attributes, choose **Product**.
2. Tap **Add New Attribute**.

*Attribute Properties*

3. Under Attribute Properties, enter a **Default Label** to identify the attribute.
4. Set **Catalog Input Type for Store Owner** to the type in input control to be used for data entry.
5. For Dropdown and Multiple Select input types, do the following:
  - a. Under **Manage Options**, tap **Add Option**.
  - b. Enter the first value that you want to appear in the list. You can enter one value for the Admin, and a translation of the value for each store view. If you have only one store view, you can enter only the Admin value and it will be used for the storefront as well.
  - c. Tap **Add Option** and repeat the previous step for each option that you want to include in the list.
  - d. Select **Is Default** to use the option as the default value.
6. If you want to require the customer to choose an option before the product can be purchased, set **Values Required** to “Yes.”

	Is Default	English	Admin	French	German	Spanish	
<input checked="" type="radio"/>	Vanilla	Vanilla	Vanille	Vanille	Vainilla		
<input type="radio"/>	Chocolate	Chocolate	Chocolat	Schokolade	Chocolate		
<input type="radio"/>	Strawberry	Strawberry	Fraise	Erdbeere	Fresa		

Add Value

*Manage Options*

## Step 2: Describe the Advanced Properties (if needed)

1. Enter a unique **Attribute Code** in lowercase characters, and without spaces.

**Advanced Attribute Properties**

Attribute Code:   
This is used internally. Make sure you don't use spaces or more than 30 symbols.

Scope:   
Declare attribute value saving scope.

Unique Value: ☐ No  
Not shared with other products.

Input Validation for Store Owner:

Add to Column Options: ☒ Yes  
Add this attribute to the list of column options in the product grid.

Use in Filter Options: ☒ Yes  
Add this attribute to the list of filter options in the product grid.

*Advanced Attribute Properties*

2. Set **Scope** to indicate where in your store hierarchy the attribute can be used.
3. If you want to prevent duplicate values from being entered, set **Unique Value** to “Yes.”
4. To run a validity test of any data entered into a text field, set **Input Validation for Store Owner** to the type of data that the field should contain. This field is not available for input types with values that are selected. The test can validate any of the following:
  - Decimal Number
  - Integer Number
  - Email
  - URL
  - Letters
  - Letters (a-z, A-Z) or Numbers (0-9)

Input Validation for Store Owner

- None
- Decimal Number
- Integer Number
- Email
- URL
- Letters
- Letters (a-z, A-Z) or Numbers (0-9)

*Input Validation*

5. To add this attribute to the product grid, set the following options to "Yes."

Add to Column Options	Includes the attribute as a column in the Products grid.
Use in Filter Options	Adds a filter control to the column header in the Products grid.

### Step 3: Enter the Field Label

1. Expand ☑ the **Manage titles** section.
2. Enter a **Title** to be used as a label for the field. If your store is available in different languages, you can enter a translated title for each view.



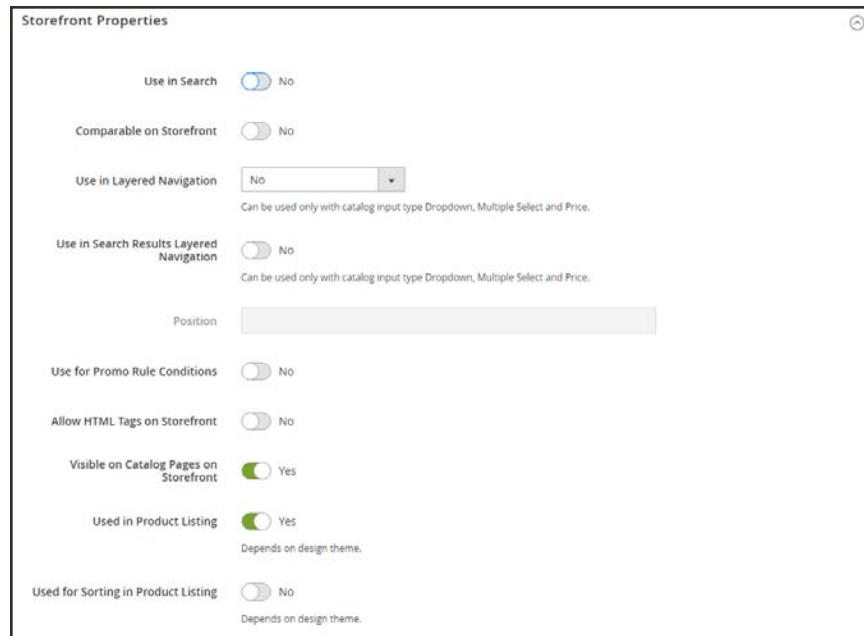
*Manage Titles*

### Step 4: Describe the Storefront Properties

1. In the panel on the left, choose **Storefront Properties**.
2. If the attribute is to be available for search, set **Use in Search** to “Yes.”
3. To include the attribute in Product Compare, set **Comparable on Storefront** to “Yes.”
4. For dropdown, multiple select and price fields, do the following:
  - a. To use the attribute as a filter in layered navigation, set **Use in Layered Navigation** to “Yes.”
  - b. to use the attribute in layered navigation on search results pages, set **Use in Search Results Layered Navigation** to “Yes,”
  - c. In the **Position** field, enter a number to indicate the relative position of the attribute in the layered navigation block.
5. To use the attribute in price rules, set **Use for Promo Rule Conditions** to “Yes,”
6. To allow the text to be formatted with HTML, set **Allow HTML Tags on Frontend** to “Yes.” This setting makes the WYSIWYG editor available for the field.  
  
To include the attribute in catalog page listings, set **Visible on Catalog Pages on Storefront** to “Yes.”
7. Complete the following settings if supported by your theme:



- a. To include the attribute on the product detail page, set **Visible on Catalog Pages on Storefront** to “Yes.”
  - b. To include the attribute in product listings, set **Used in Product Listing** to “Yes.”
  - c. To use attribute as a sort parameter for product listings, set **Used for Sorting in Product Listing** to “Yes.”
8. When complete, tap **Save Attribute**.



The screenshot shows the 'Storefront Properties' configuration screen for a product attribute. The screen has a title bar 'Storefront Properties' with a close button in the top right corner. The configuration options are as follows:

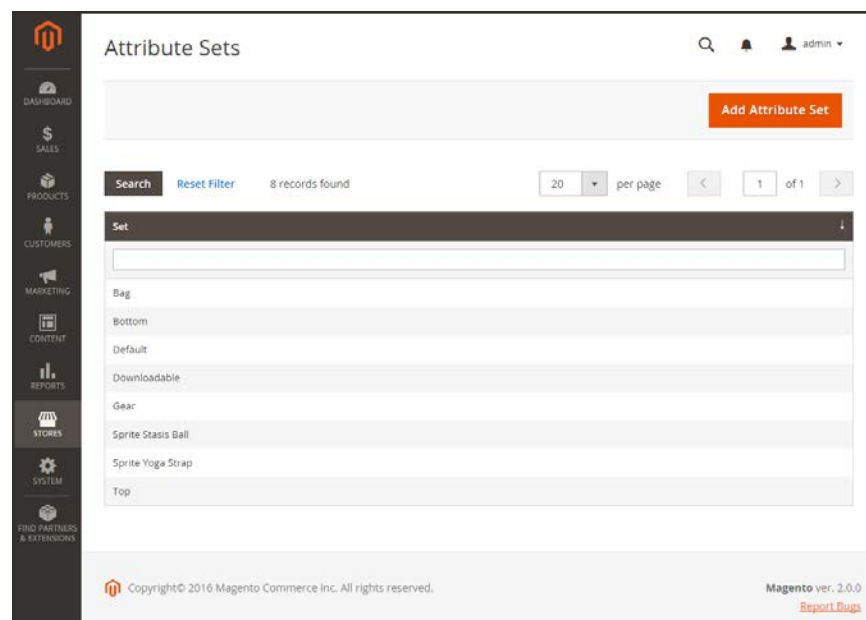
- Use in Search:** Toggle switch set to 'No'.
- Comparable on Storefront:** Toggle switch set to 'No'.
- Use in Layered Navigation:** Dropdown menu set to 'No'. Below it, a note states: 'Can be used only with catalog input type Dropdown, Multiple Select and Price.'
- Use in Search Results Layered Navigation:** Toggle switch set to 'No'. Below it, a note states: 'Can be used only with catalog input type Dropdown, Multiple Select and Price.'
- Position:** A horizontal input field.
- Use for Promo Rule Conditions:** Toggle switch set to 'No'.
- Allow HTML Tags on Storefront:** Toggle switch set to 'No'.
- Visible on Catalog Pages on Storefront:** Toggle switch set to 'Yes'.
- Used in Product Listing:** Toggle switch set to 'Yes'. Below it, a note states: 'Depends on design theme.'
- Used for Sorting in Product Listing:** Toggle switch set to 'No'. Below it, a note states: 'Depends on design theme.'

*Storefront Properties*

## Attribute Sets

One of the first steps when creating a product is to choose the attribute set that is used as a template for the product record. The attribute set determines the fields that are available during data entry, and the values that appear to the customer.

The attributes are organized into groups that determine where they appear in the product record. Your store comes with an initial attribute set called “default” which includes a set of commonly-used attributes. If you would like to add only a small number of attributes, you can add them to the default attribute set. However, if you sell products that require specific types of information, such as cameras, it might be better to create a dedicated attribute set that includes the specific attributes that are needed to describe the product.



*Attribute Sets*

### To create an attribute set:

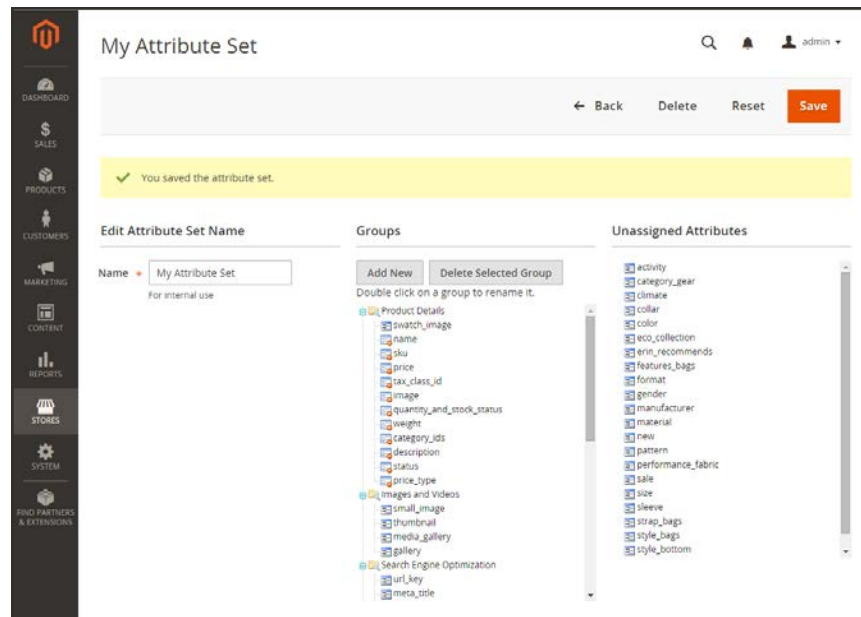
1. On the Admin sidebar, tap **Stores**. Then under **Attributes**, choose **Attribute Set**.
2. Tap **Add New Set**. Then, do the following:

### *Edit Set Name*

- a. Enter a **Name** for the attribute set.
- b. Set **Based On** to an existing attribute set to be used as a template.
- c. Tap **Save** . The next page displays the following:
  - The left column shows the name of the attribute set. The name is for internal reference, and can be changed as needed.
  - The center of the page lists the current selection of attribute groups.
  - The right column lists the selection of attributes that are currently not assigned to the attribute set.
- d. To add a new attribute to the set, drag the attribute from the **Unassigned Attributes** list to the appropriate folder in the **Groups** column.

System attributes are marked with a dot and cannot be removed from the Groups list. They can however, be dragged to another Group in the attribute set.

3. When complete, tap **Save**.



*Edit Attribute Set*

### To create a new attribute group:

1. In the Groups column the attribute set, tap **Add New**.
2. Enter a **Name** for the new group, and tap **OK**.
3. Do either of the following:
  - Drag **Unassigned Attributes** to the new group.
  - Drag attributes from any other group to the new group.

The new group becomes a section of attributes in any product that is based on the attribute set.

# S ystem

## Contents

In this section of the guide, you'll learn how to import and export data, manage security and permissions, install extensions and integrations, and use the many tools that are available to maintain your store at peak performance.

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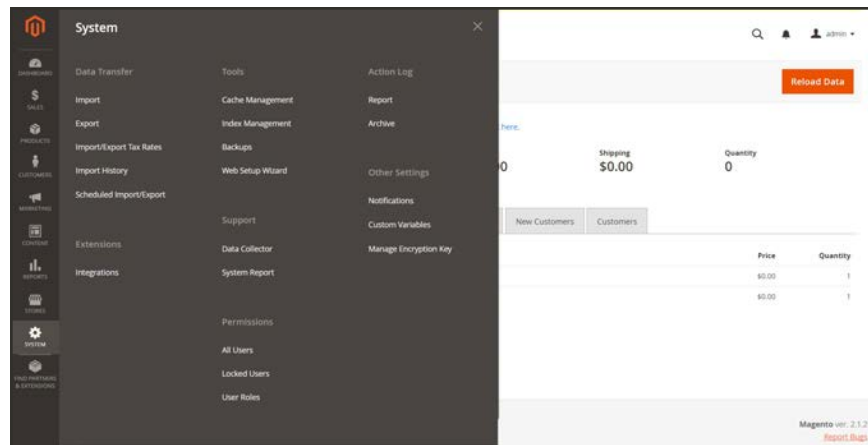
##### Data Collector

##### System Report

## CHAPTER 87:

# System Menu

The System Menu includes tools to import and export data, install extensions, manage system caches and indexes, manage permissions, backups, system notifications, and custom variables.

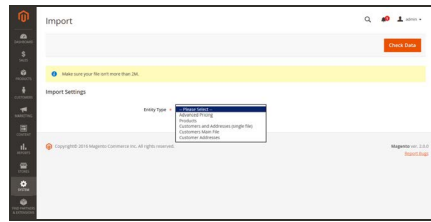


*System Menu*

## To display the System menu:

On the Admin sidebar, tap **System**.

## Menu Options



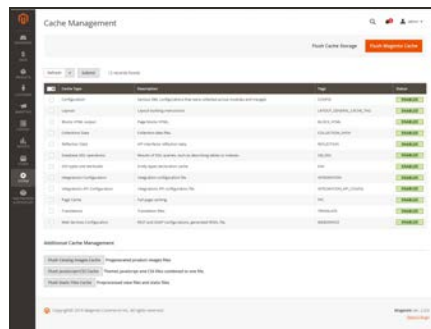
## Data Transfer

The Import and Export tools give you the ability to manage multiple records in a single operation. You can import new items, and also update, replace, and delete existing products and tax rates.



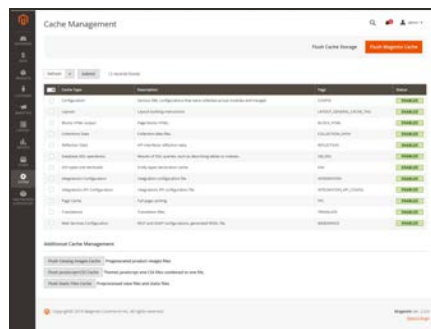
## Extensions

Manage integrations and extensions for your store.



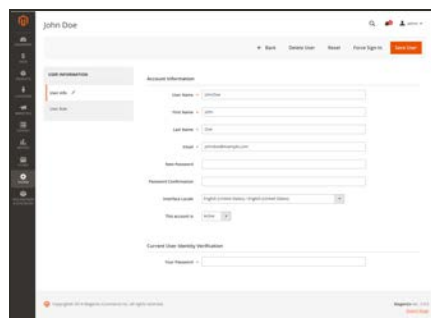
## Tools

Manage your system resources, including cache and index management, backups, and installation settings.



## Support

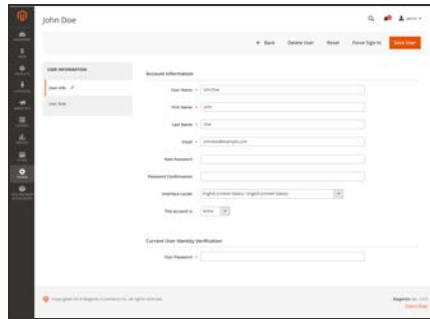
The Support Tools can be used as a resource during the development and optimization processes, and as a diagnostic tool to help our Support team identify and resolve issues with your system.



## Permissions

Magento uses roles and permissions to create different levels of access for Admin users, which gives you the ability to grant permission on a “need to know” basis to people who work on your site.





## Action Log

The Action Log tracks the activities of administrators who work in your store. For most events, the available information includes the action, the name of the user who performed it, whether it was a success or failure, and the ID of the object that was the target of the action. The Admin Actions archive lists the CSV log files that are stored on the server.



## Other Settings

Manage the **notifications** in your inbox, create **custom variables**, and generate a new **encryption key**.





## CHAPTER 88:

# Data Transfer

The Import and Export tools give you the ability to manage multiple records in a single operation. You can not only import new items, but also update, replace, and delete existing sets of products. For example, you can add new products to your inventory, update product data and advanced price data, and replace a set of existing products with new products. If you have a large catalog of products, it's much easier to export the data, edit the data in a spreadsheet, and import it back into your store.

- [Working with CSV Files](#)
- [Import](#)
- [Export](#)
- [Scheduled Import/Export](#)
- [Product Attribute Reference](#)
- [Customer Attribute Reference](#)

## Working with CSV Files

The comma-separated-value (CSV) file format is used as the basis of data transfer operations, and is supported by all spreadsheet and database applications. The following file types are supported for import and export:

Import	CSV and ZIP (a compressed CSV file.)
Export	CSV

**Important!** We recommend that you use a program that supports UTF-8 encoding, such as **Notepad++** or **OpenOffice Calc**, to edit CSV files. Microsoft Excel inserts additional characters into the column header of the CSV file, which can prevent the data from being imported back into Magento. If you work on the Mac, you can save your data in the CSV (Windows) format.

CSV files have a specific structure that must match the database. Each column heading corresponds to the Attribute Code of the field that is represented by the column. To ensure that the column headings can be read by Magento, first export the data from your store as a CSV file. You can then edit the data and re-import it into Magento.

If you open an exported CSV file in a text editor, you will see that values are separated by commas, and multiple values are enclosed in double-quotes. During import, you can specify a custom separator character, although a comma is the default.

### Product CSV Structure

A full export of the product database contains information about each product in the catalog, and the relationships between them. Each record has fixed selection of columns that corresponds to the attributes in the catalog, although the order of the attributes is ignored during the import process.

	A	B	C	D	E	F	G	H	I
1	id	store_view_code	attribute_set_code	product_type	categories	product_websites	name	description	short_description
2	24-48001		Bag	simple	Default	Category/Gear/Bag	base	base	short
3	24-48004		Bag	simple	Default	Category/Collections/Default	Category/Gear/Bag/Default	base	Category/Collections/Em
4	24-48003		Bag	simple	Default	Category/Gear/Default	Category/Gear/Bag	base	Driver
5	24-48005		Bag	simple	Default	Category/Collections/Default	Category/Gear/Bag/Default	base	Category/Collections/New
6	24-48006		Bag	simple	Default	Category/Collections/Default	Category/Gear/Bag/Default	base	Category/Collections/New
7	24-48002		Bag	simple	Default	Category/Gear/Default	Category/Gear/Bag	base	Fusion
8	24-48002		Bag	simple	Default	Category/Gear/Default	Category/Gear/Bag	base	Impulse
9	24-48001		Bag	simple	Default	Category/Gear/Default	Category/Gear/Bag	base	Vintage
10	24-48002		Bag	simple	Default	Category/Gear/Default	Category/Gear/Bag	base	Complete
11	24-48005		Bag	simple	Default	Category/Collections/Default	Category/Gear/Bag/Default	base	Category/Collections/Em
12	24-48006		Bag	simple	Default	Category/Collections/Default	Category/Gear/Bag/Default	base	Category/Collections/Em
13	24-48003		Bag	simple	Default	Category/Gear/Default	Category/Gear/Bag	base	Driver
14	24-48007		Bag	simple	Default	Category/Collections/Default	Category/Gear/Default	base	Category/Collections/New
15	24-48004		Bag	simple	Default	Category/Collections/Default	Category/Gear/Default	base	Category/Collections/Performance
16	24-UG06		Gear	simple	Default	Category/Gear/Default	Category/Gear/Fitness	Equipment	base
17	24-UG07		Gear	simple	Default	Category/Collections/Default	Category/Gear/Default	Category/Gear/Fitness	Equipment/Default
18	24-UG04		Gear	simple	Default	Category/Gear/Default	Category/Gear/Fitness	Equipment	base
19	24-UG02		Gear	simple	Default	Category/Gear/Default	Category/Gear/Fitness	Equipment	base
20	24-UG05		Gear	simple	Default	Category/Gear/Default	Category/Gear/Fitness	Equipment/Default	Category/Promotions
21	24-UG01		Gear	simple	Default	Category/Gear/Default	Category/Gear/Fitness	Equipment	base
22	24-UG084		Gear	simple	Default	Category/Gear/Default	Category/Gear/Fitness	Equipment	base
23	24-UG088		Gear	simple	Default	Category/Gear/Default	Category/Gear/Fitness	Equipment	base
24	24-UG03		Gear	simple	Default	Category/Gear/Default	Category/Gear/Fitness	Equipment	base

*Exported Product CSV in OpenOffice Calc*

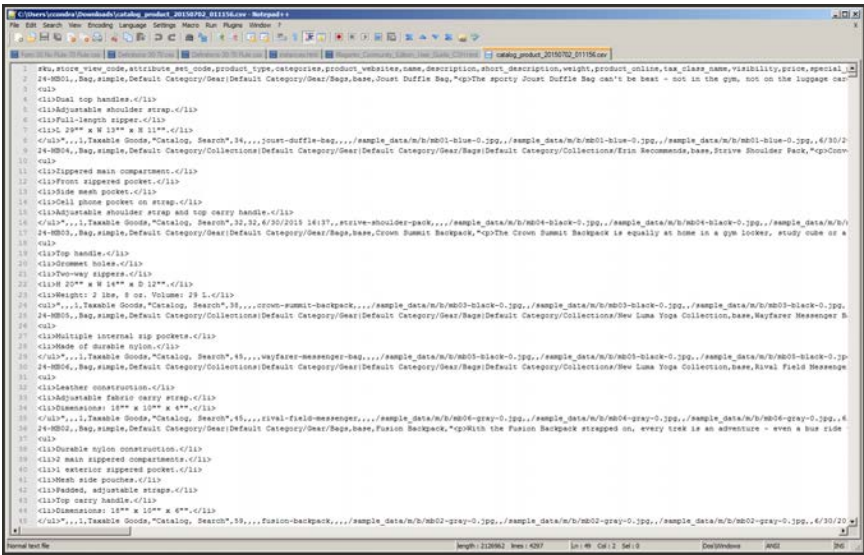
The first row of the table contains the names of each attribute, which are used as column headers. The remaining rows describe the individual product records. Any row that begins with a value in the SKU column is the beginning of a new product record. A single product might include several rows that contain information about multiple images or product options. The next row that has a value in the SKU column begins a new product.

The category column contains a path for each category to which the product is assigned. The path includes the root category, followed by a forward slash (/) between each level. By default, the pipe “|” character is used to separate different category paths. For example:

Default Category/Gear|Default Category/Gear/Bags.

To import data, you need to include only the SKU and any columns with changes. Any blank columns are ignored during the import process. It is not possible to add attributes during the import process. You can include only existing attributes.

For a detailed description of each product attribute, see: [Product Attribute Reference](#).



Exported Product CSV in Notepad++

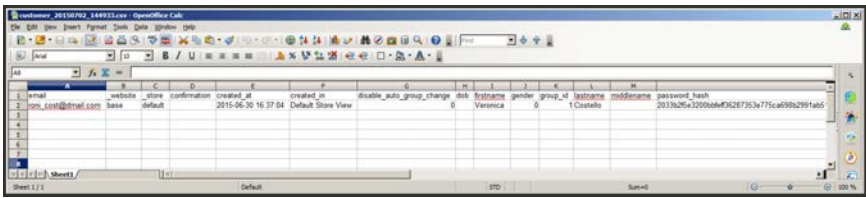
CSV Product Structure

COLUMN NAME	DESCRIPTION
<u>&lt;name&gt;</u>	Column headers that begin with an underscore contain service entity properties or complex data. Service columns are not product attributes.
<attribute name>	Column headers with an attribute code or field name identify the column of data. A column might represent a system attribute, or one that was created by the store administrator.

Customer CSV Structure

The customers CSV file contains customer information from the database, and has the

following structure:

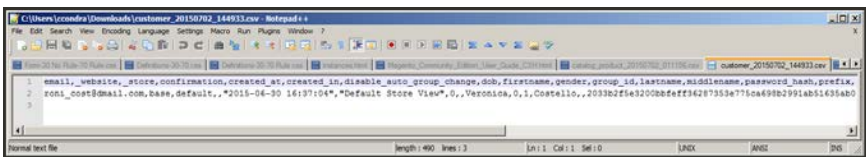


*Exported Customer CSV in OpenOffice Calc*

The first row of the table contains the names of the attribute columns (which are the same as attribute codes). There are two types of column names, as shown in the following table. Other rows contain attribute values, service data, and complex data. Each row with non-empty values in the “email” and “\_website” columns starts the description of the subsequent customer. Each row can represent customer data with or without address data, or the address data only. In case a row contains only the address data, values in the columns, related to the customer profile, will be ignored and may be empty.

To add or replace more than one address for a customer, in the import file add a row for each new address with empty customer data and the new or updated address data below the customer data row.

For a detailed description of each customer attribute, see: [Customer Attribute Reference](#).



*Exported Customer CSV in Notepad++*

### CSV Customer Structure

COLUMN NAME	DESCRIPTION
<u>&lt;name&gt;</u>	Column headers that begin with an underscore contain service entity properties or complex data. Service columns are not customer attributes.
<attribute name>	The names of the columns with values of both system-created attributes, and attributes created by the store administrator.

## Data Validation

All data must pass validation before it can be imported into the store, to ensure that the values are consistent with the system database. Validation begins when you tap the Check Data button. During the process, all entities in the import file are verified for the following:

Attributes	Column header names are verified to ensure that they match the corresponding attributes in the system database. The value of each attribute is checked to ensure that it meets the requirements of the data type (decimal, integer, varchar, text, and datetime)
Complex Data	Values that originate from a defined set, such as a drop-down or multiple select input type, are verified to ensure that the values exist in the defined set.
Service Data	The values in service data columns are verified to ensure that the properties or complex data values are consistent with what is already defined in the system database.
Required Values	For new entities, the presence of required attribute values in the file is checked. For existing entities, there is no need to re-check the existence of required attribute values.
Separators	Although the separators aren't visible when viewed in a spreadsheet, data values in a CSV file are separated by comma, and text values are enclosed in double-quotes. During the validation process, the separators are verified, and each set of quotes that enclose character strings is verified to be formatted correctly.

The results of the validation appear in the Validation Results section, and include the following information:

- The number of entities checked
- The number of invalid rows
- The number of errors found

If the data is valid, an “Import Success” message appears.



*File is Valid!*

If validation fails, read the description of each error, and correct the problem in the CSV file. For example, if a row contains an invalid SKU, the import process stops, and that row, and all subsequent rows are not imported. After correctly the problem, import the data again. If many errors are encountered, it might take several attempts to pass validation.

## Data Validation Messages

### MESSAGES

#### DATA VALIDATION

- Product with specified SKU not found in rows: 1
- URL key for specified store already exists
- '7z' file extension is not supported
- 'txt' file extension is not supported

#### ERRORS

- Wrong field type. Type in the imported file %decimal%, expected type is %text%.
- Value is not allowed. Attribute value does not exist in the system.
- Field %column name% is required.
- Wrong value separator is used.
- Wrong encoding used. Supported character encoding is UTF-8 and Windows-1252.
- Imported file does not contain SKU field.
- SKU does not exist in the system.
- Column name %column name% is invalid. Should start with a letter. Alphanumeric.
- Imported file does not contain a header.
- %website name% website does not exist in the system.
- %storeview name% storeview does not exist in the system.
- Imported attribute %attribute name% does not exist in the system.
- Imported resource (image) could not be downloaded from external resource due to timeout or access permissions.
- Imported resource (image) does not exist in the local media storage.
- Product creation error displayed to the user equal to the one seen during manual product save.
- Advanced Price creation error displayed to the user equal to the one seen during the manual product save.
- Customer creation error displayed to the user equal to the one seen during the manual customer save.

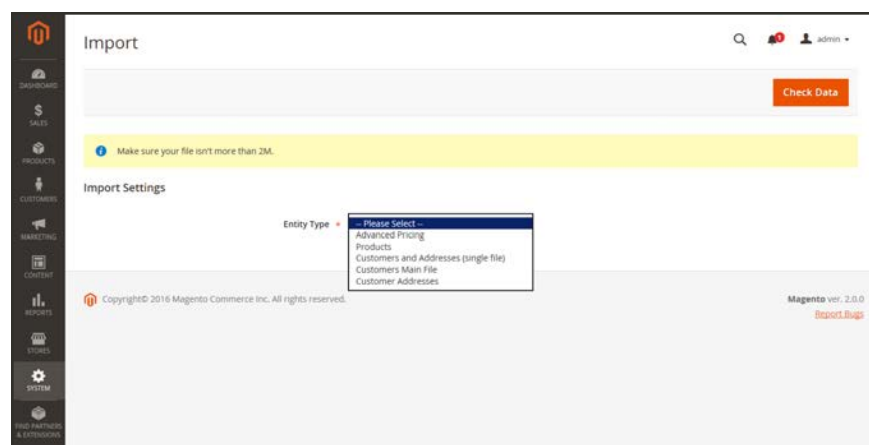


## Import

Data for all product types can be imported into the store. In addition, you can import customer data, customer address data, and product images. Import supports the following operations:

- Add/Update
- Replace Existing Complex Data
- Delete Entities

The size of the import file is determined by the settings in the php.ini file on the server. The system message on the Import page indicates the current size limit.



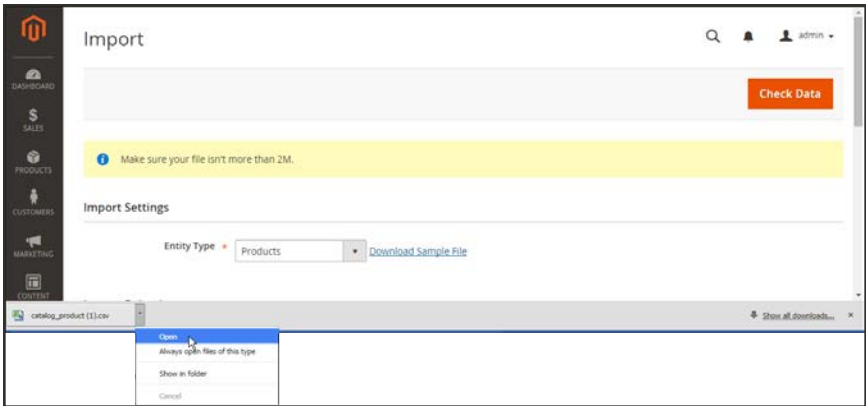
*Import*

### Process Overview:

- Step 1: **Prepare the Data**
- Step 2: **Choose the Import Behavior**
- Step 3: **Identify the Import File**
- Step 4: **Check the Import Data**

Step 1: Prepare the Data

- 1. On the Admin sidebar, tap **System**. Then under **Data Transfer**, choose **Import**.
- 2. Under Import Settings, set **Entity Type** to one of the following:
  - Advanced Pricing
  - Products
  - Customers and Addresses
  - Customers Main File
  - Customer Addresses
- 3. Tap **Download Sample File**. Then on the download menu in the lower-left corner of your browser window, choose **Open**.



Download Sample File

The sample file includes column headings with placeholder data for example product types.

	A	B	C	D	E	F	G	H	I
1	sku	website_code	store_view_code	attribute_set_code	product_type	name	description	short_description	weight
2	simple sku1	base	default	default	simple	Simple	Product		1 Simple
3	simple sku2 with custom options	base	default	default	simple	Simple	Product	2 With	
4	configurable sku1	base	default	default	configurable	Configurable	Product	<p>Line 1</p><p>Line 2</p><p>Line 3</p><p>Configurable Product 1 Description</p>	1</td>
5	bundle sku1	base	default	default	bundle	Bundle	Product	<p>Line 1</p><p>Line 2</p><p>Line 3</p><p>Bundle Product 1 Description</p>	1</td>
6	bundle sku2	base	default	default	bundle	Bundle	Product	<p>Line 1</p><p>Line 2</p><p>Line 3</p><p>Bundle Product 2 Description</p>	2</td>
7	grouped sku1	base	default	default	grouped	Grouped	Product	<p>Line 1</p><p>Line 2</p><p>Line 3</p><p>Grouped Product 1 Description</p>	1</td>

Downloaded Sample File

4. Examine the structure of the sample file. As you prepare your CSV import file, make sure that the column headings are spelled correctly.
5. Verify that the size of your import file does not exceed the limit shown in the message.



6. If the import data includes paths to product images, make sure that the image files have been uploaded to the appropriate location. The default location on the Magento server is: `pub/media/import`.

If the images reside on an external server, make sure that you have the full URL to the directory that contains the images.

## Step 2: Choose the Import Behavior

1. Set **Import Behavior** to one of the following:
  - Add/Update
  - Replace Existing Complex Data
  - Delete Entities
2. Do the following:
  - a. Accept the default value of a comma (,) for the **Field separator**.
  - b. Accept the default value of a comma (,) for the **Multiple value separator**.

In a CSV file, a comma is the default separator. To use a different character, make sure that the data in the CSV file matches the character that you specify.

 A screenshot of the 'Import Behavior' configuration form. It has a title 'Import Behavior' at the top. Below the title, there are three rows of configuration options:
 

- 'Import Behavior' with a dropdown menu currently showing 'Add/Update'.
- 'Field separator' with a text input field containing a comma (,).
- 'Multiple value separator' with a text input field containing a comma (,).

*Import Behavior*

## Step 3: Identify the Import File

1. Tap **Choose File** to select the file to import.
2. Find the CSV file that you prepared to import, and tap **Open**.

- 3. In the **Images File Directory** field, enter the relative path to the location on the Magento server where uploaded images are stored. For example: `var/import`.

To learn more about importing product images, see: [Importing Product Images](#).

File to Import

Select File to Import \*

Choose File

import\_data.csv

Images File Directory

var/import

For Type "Local Server" use relative path to Magento installation, e.g. var/export, var/import, var/export/some/dir

File to Import

Step 4: Check the Import Data

- 1. In the upper-right corner, tap **Check Data**.
- 2. Then, wait a few moments for the validation process to complete. If the import data is valid, the following message appears:

Validation Results

Checked rows: 2, checked entities: 1, invalid rows: 0, total errors: 0

File is valid! To start import process press "import" button

Import

File is Valid!

- 3. If the file is valid, tap **Import**. Otherwise, correct each problem with the data that is listed in the message, and try to import the file again.
- 4. The import process continues to the end of the data, unless an error is encountered.

If an error message appears in the Validation Results, correct the problem in the data, and import the file again.

Validation Results

URL key for specified store already exists.

URL Key Already Exists

A message appears when the import is complete.

Import Behavior

OPERATION	DESCRIPTION
Add/Update	New product data is added to the existing product data for the existing entries in the database. All fields except sku can be updated.

**Import Behavior (cont.)**

OPERATION	DESCRIPTION
	<p>New tax classes that are specified in the import data are created automatically.</p> <p>New product categories that are specified in the import file are created automatically.</p> <p>New SKUs that are specified in the import file are created automatically</p>
Replace Existing Complex Data	<p>The existing product data is replaced with new data.</p> <div data-bbox="711 625 1446 720"> <p>Exercise caution when replacing data because the existing product data will be completely cleared and all references in the system will be lost.</p> </div> <p>If a SKU in the import data matches the SKU of an existing entity, all fields, including the SKU are deleted, and a new record is created using the CSV data.</p> <p>An error occurs if the CSV file references a SKU that does not exist in the database. You can Check Data to display error.</p>
Delete Entities	<p>Any entities in the import data that already exist in the database are deleted from the database.</p> <p>Delete ignores all columns in the import data, except for SKU. You can disregard all other attributes in the data.</p> <p>An error occurs if the CSV file references a SKU that does not exist in the database. You can Check Data to display error.</p>

## Import History

Maintains a record of data that has been imported into your store, including the start date and time, user, execution time, and a link to the imported file.

### To view the import history:

1. On the Admin sidebar, tap **System**.
2. Under **Data Transfer**, choose **Import History**.

The screenshot displays the 'Import History' page in the Magento Admin interface. The page features a sidebar on the left with navigation links for Dashboard, Sales, Products, Customers, Marketing, Content, and Reports. The main content area has a header with the title 'Import History' and a search bar. Below the header, there is a table with the following columns: ID, Start Date&Time, User, Imported File, Error File, Execution Time, and Summary. The table contains one record with the following details: ID 1, Start Date&Time Dec 4, 2015, 11:45:41 AM, User, Imported File (Download link), Error File, Execution Time 05:00:36, and Summary Created: 1994, Updated: 0, Deleted: 0. The page also includes a footer with the Magento logo, copyright information, and the version number 'Magento ver. 2.0.0'.

ID	Start Date&Time	User	Imported File	Error File	Execution Time	Summary
1	Dec 4, 2015, 11:45:41 AM		<a href="#">Download</a>		05:00:36	Created: 1994, Updated: 0, Deleted: 0

*Import History*

## Importing Product Images

Multiple product images of each type can be imported into Magento, and associated with a specific product. The path and file name of each product image is entered in the CSV file, and the image files to be imported are uploaded to the corresponding path on the Magento server or external server.

Magento creates its own directory structure for product images that is organized alphabetically. When you export product data with existing images to a CSV file, you can see the alphabetized path before the file name of each image. However, when you import new images, you don't need to specify a path, because Magento manages the directory structure automatically. Just make sure to enter the relative path to the import directory before the file name of each image to be imported.

To upload images, you must have login credentials and correct permissions to access to the Magento folder on the server. With the correct credentials, you can use any SFTP utility to upload the files from your desktop computer to the server.

Before you try to import a large amount of images, review the steps in the import method that you want to use, and run through the process with a few products. After you understand how it works, you'll feel confident importing large quantities of images.

**Important!** We recommend that you use a program that supports UTF-8 encoding to edit CSV files, such as **Notepad++** or **OpenOffice Calc**. Microsoft Excel inserts additional characters into the column header of the CSV file, which can prevent the data from being imported back into Magento.

### Method 1: Import Images from the Local Server

1. On the Magento server, upload the image files to the `pub/media/import` folder. This is the default folder for importing product images.

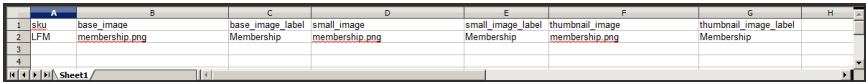
```
[magento installation folder]/pub/media/import
```

You can use a different folder on the Magento server, as long as the path to the folder is specified during the import process.

2. In the CSV data, enter the name of each image file to be imported on the correct row, by sku, and in the correct column according to image type (`base_image`, `small_image`, `thumbnail_image`, or `additional_images`).

For images in the default import folder (`/pub/media/import`), do not include the path before the filename in the CSV data.

The CSV file must include only the sku column and the related image columns.



	A	B	C	D	E	F	G	H
1	sku	base_image	base_image_label	small_image	small_image_label	thumbnail_image	thumbnail_image_label	
2	LFM	membership.png	Membership	membership.png	Membership	membership.png	Membership	
3								
4								

CSV Import Image from Default Location

3. Follow the instructions to **import** the data.

After selecting the file to import, enter the relative path following **Images File Directory**:

`/pub/media/import`

File to Import

Select File to Import \*  catalog-images.csv

Images File Directory

For Type "Local Server" use relative path to Magento installation, e.g. var/export, var/import, var/export/some/dir

Images File Directory

If importing multiple images for a single sku, insert a blank row below the sku, and enter the additional image file names in the appropriate columns. The additional rows are understood to belong to the parent sku.

**Method 2: Import Images from External Server**

1. Upload the images to be imported to the designated folder on the external server.
2. In the CSV data, enter the full URL for each image file in the correct column by image type (base\_image, small\_image, thumbnail\_image, or additional\_images).

`http://example.com/images/image.jpg`

3. Follow the instructions to **import** the data.



## Import Guidelines

### New Entities

- ☒ Entities are added with the attribute values specified in the CSV file.
- ☒ If there is no value, or there is a non-valid value, for a required attribute with no default value set, then the entity (the corresponding row or rows) cannot be imported.
- ☒ If there is no value, or there is a non-valid value, for a required attribute with the default value set, then the entity (the corresponding row or rows) is imported, and the default value is set for the attribute.
- ☒ If the complex data is not valid, then the entity (the corresponding row or rows) cannot be imported.

### Existing Entities

- ☒ For attributes that are not complex data, the values from the import file, including the empty values for the non-required attributes, replace the existing values.
- ☒ If there is no value, or there is a non-valid value, for a required attribute, then the existing value is not replaced.
- ☒ If the complex data for the entity is invalid, the entity (the corresponding row or rows) cannot be imported, except the case, when Delete Entities was selected in the Import Behavior drop-down menu.

## Complex Data

If an attribute that is specified in the import file already exists, and its value is derived from a defined set of values, the following applies:

- ☒ If the value is not already included in the defined set of values, the row can be imported and a default value, if defined, is set for the attribute.
- ☒ If the value is already included in the defined set, the corresponding row cannot be imported.

If an attribute name is specified in the import file but is not yet defined in the system, it is not created, and its values are not imported.

## Invalid Files

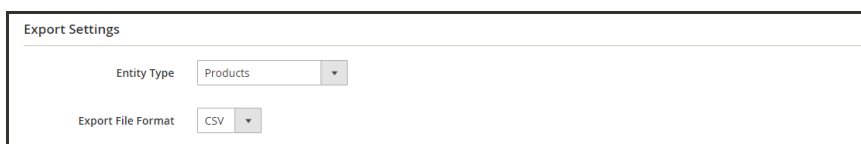
- ☒ A file cannot be imported if all rows are invalid.
- ☒ A non-existing service data or complex data name is specified in the import file, such as a column with a `_<non-existing name>` heading.

## Export

The best way to become familiar with the structure of your database is to export the data and open it in a spreadsheet. Once you become familiar with the process, you'll find that it is an efficient way to manage large amounts of information.

### To export data:

1. On the Admin sidebar, tap **System**. Then under **Data Transfer**, choose **Export**.
2. In the Export Settings section, specify the following:
  - a. Set **Entity Type** to one of the following:
    - Products
    - Customers Main File
    - Customer Addresses
  - b. Accept the default **Export File Format** of "CSV."



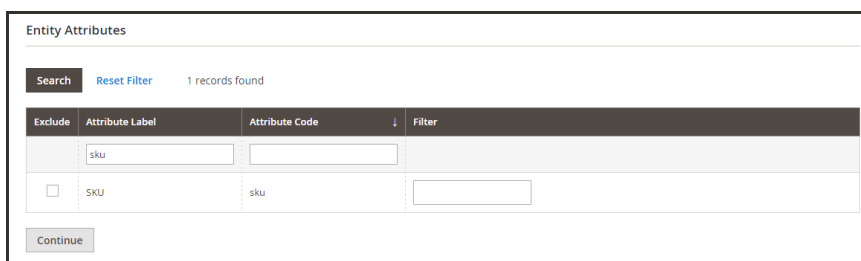
Export Settings

Entity Type: Products

Export File Format: CSV

*Export Settings*

3. The Entity Attributes section lists all the available attributes in alphabetical order. You can use the standard **list controls** to search for specific attributes, and to sort the list. The Search and Reset Filter controls control the display of the list, but have no effect on the selection of attributes to be included in the export file.



Entity Attributes

Search Reset Filter 1 records found

Exclude	Attribute Label	Attribute Code	Filter
<input type="checkbox"/>	SKU	sku	

Continue

*Filtered Entity Attributes*

4. To filter the exported data based on attribute value, do the following:
- To export only records with specific attribute values, enter the required value in the **Filter** column. The following example exports only a specific SKU.

The screenshot shows the 'Entity Attributes' export interface. At the top, there are 'Search' and 'Reset Filter' buttons, and a status '1 records found'. Below is a table with columns: 'Exclude', 'Attribute Label', 'Attribute Code', and 'Filter'. The first row has an empty 'Exclude' checkbox, 'sku' in 'Attribute Label', an empty 'Attribute Code' field, and an empty 'Filter' field. The second row has a checked 'Exclude' checkbox, 'SKU' in 'Attribute Label', 'sku' in 'Attribute Code', and 'V-Neck T' in 'Filter'. A callout bubble points to the 'Filter' field with the text 'SKU to export'. At the bottom left is a 'Continue' button.

*Export Product Based on SKU*

- To omit an attribute from the export, mark the **Exclude** checkbox at the beginning of the row. For example, to export only the sku and image columns, select the checkbox of every other attribute. The column appears in the export file, but without any values.

The screenshot shows the 'Entity Attributes' export interface with '85 records found'. The table has columns: 'Exclude', 'Attribute Label', 'Attribute Code', and 'Filter'. The first row has an empty 'Exclude' checkbox, an empty 'Attribute Label' field, an empty 'Attribute Code' field, and an empty 'Filter' field. The second row has a checked 'Exclude' checkbox, 'activity\_bags' in 'Attribute Label', 'activity\_bags' in 'Attribute Code', and a dropdown menu in 'Filter'. The third row has a checked 'Exclude' checkbox, 'activity\_general' in 'Attribute Label', 'activity\_general' in 'Attribute Code', and a dropdown menu in 'Filter'. The fourth row has a checked 'Exclude' checkbox, 'Category Gear' in 'Attribute Label', 'category\_gear' in 'Attribute Code', and a dropdown menu in 'Filter'. The fifth row has a checked 'Exclude' checkbox, 'Categories' in 'Attribute Label', 'category\_ids' in 'Attribute Code', and an empty 'Filter' field. A callout bubble points to the 'Exclude' checkbox of the second row with the text 'Exclude'. At the bottom left is a 'Continue' button.

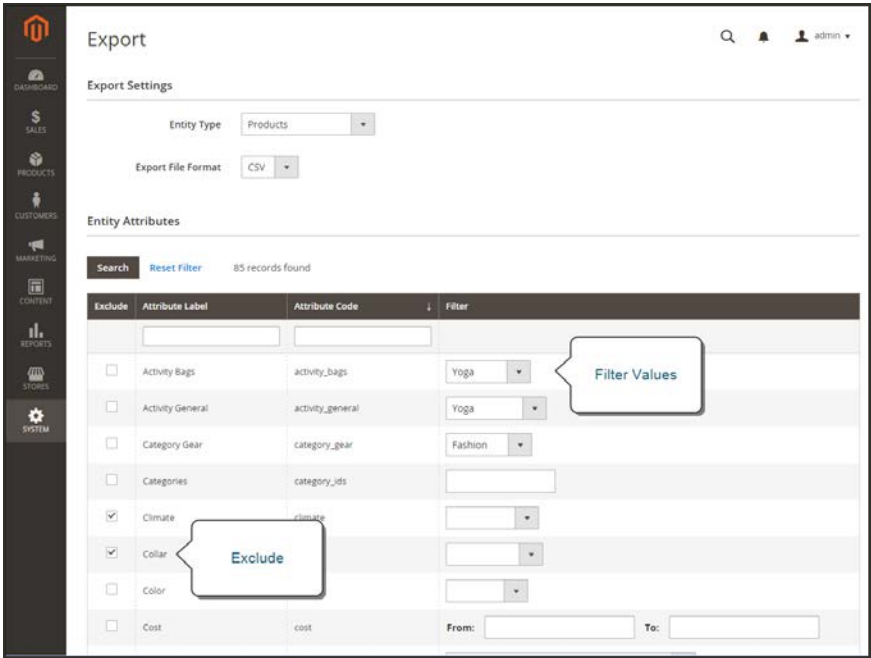
*Exclude Attributes*

5. Scroll down and tap **Continue** in the lower-right corner of the page.

Look for the download prompt in the lower-right corner of your browser. The exported CSV file can be saved or opened in a spreadsheet. You can edit the data and import it back into your store.

# Export Criteria

Export filters are used to specify the data that you want to in the export file, based on attribute value. In addition, you can specify which attribute data you want to include or exclude from the export.



Export Criteria

## Export Filters

You can use filters to determine which SKUs are included in the export file. For example, if you enter a value in the Country of Manufacture filter, the exported CSV file will include only products manufactured in that country.

The type of filter corresponds to the data type. For date fields, you can choose the date from the Calendar . To learn more, see: [Attribute Input Types](#). The format of the date is determined by the [locale](#).

To include only records with a specific value, such as a sku, type the value into the Filter field. Some fields such as Price, Weight, and Set Product as New have a from/to range of values.

## Exclude Attributes

The checkbox in the first column is used to exclude attributes from the export file. If an attribute is excluded, the associated column in the export data is included, but empty.

### Export Criteria

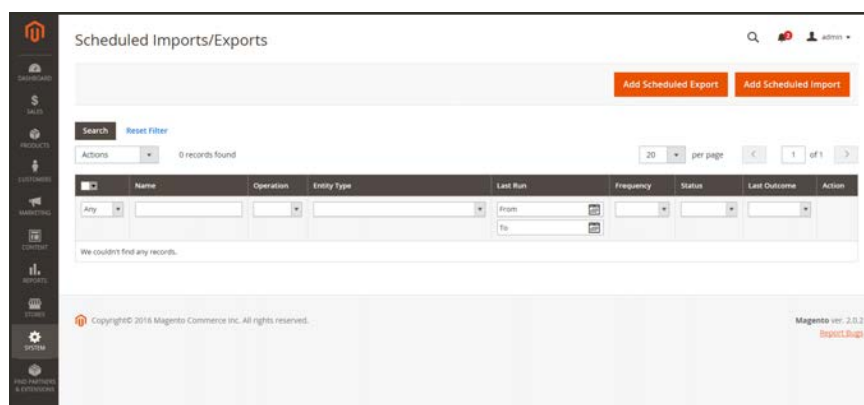
EXCLUDE	FILTER	RESULT
<input type="checkbox"/>	No	The exported file contains each attribute for all existing records.
<input type="checkbox"/>	Yes	The export file contains each attribute with only the records allowed by the filter.
<input checked="" type="checkbox"/>	No	The export file does not include the column for the excluded attribute, but does include all existing records.
<input checked="" type="checkbox"/>	Yes	The export file does not include the column for the excluded attribute, and contains only the records allowed by the filter.

## Scheduled Import/Export

Scheduled imports and exports can be run on a daily, weekly or monthly basis. The files to be imported or exported can be located on local Magento servers, or on remote FTP servers. Scheduled Import/Export is implemented by default, and does not require additional configuration. All scheduled imports and exports are managed by the Cron job scheduler.

### To access scheduled import/export:

1. On the Admin sidebar, tap **System**. Then under **Data Transfer**, choose **Scheduled Imports/Exports**.



*Scheduled Import/Export*

2. To create a new scheduled import or export job, tap the appropriate button. Then follow the instructions for the type of scheduled job.
  - [Add Scheduled Export](#)
  - [Add Scheduled Import](#)

When the record is saved, the job appears in the Scheduled Import/Export grid.

3. After each scheduled job, a copy of the file is placed in the `var/log/import_export` directory on the Magento local server.

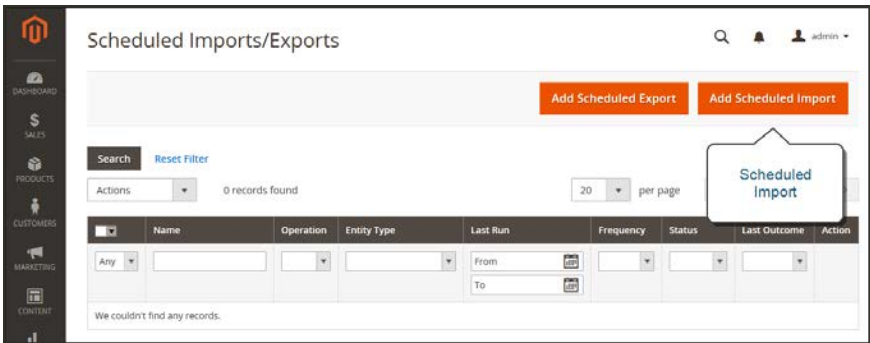
The details of each operation are not written to the log. If an error occurs, notification is sent of the failed import/export job, with a description of the error.

## Scheduling an Import

The Scheduled Import process is similar to the manual Import process, with respect to the available import file format and types of import entities:

- The import file should be in .CSV format
- You can import product and customer data

The advantage of using Scheduled Import is that you can import a data file multiple times automatically, after specifying the import parameters, and schedule only once.



*Add Scheduled Import*

The details of each import operation are not written to a log, but in case of failure you will receive an Import Failed email, with a description of the error. The result of the last scheduled import job is shown in the Last Outcome column on the Scheduled Import/Export page.

After each import operation, a copy of the import file is placed in the `var/log/import_export` directory on the server where Magento is deployed. The timestamp, the marker of the imported entity (products or customers), and the type of the operation (in this case, import) are added to the import file name.

After each scheduled import job, a reindex operation is performed automatically. On the frontend, changes in the descriptions and other text information are reflected after the updated data goes to the database, and the changes in prices are reflected only after the reindex operation.

**Process Overview**

- Step 1: [Complete the Import Settings](#)
- Step 2: [Complete the Import File Information](#)
- Step 3: [Configure the Import Failed Emails](#)



## Step 1: Complete the Import Settings

1. On the Admin sidebar, tap **System**. Then under **Data Transfer**, choose **Import/Export**.
2. In the upper-right corner, tap **Add Scheduled Import**. Then, do the following:
  - a. Enter a **Name** for the scheduled import.
  - b. Enter a brief **Description** that explains the purpose of the import, and how it is to be used.
  - c. Set **Entity Type** to one of the following:
    - Products
    - Customers
  - d. Set **Import Behavior** to one of the following:
 

Append Complex Data	Adds new complex data to the existing complex data for existing entries in the database. This is the default value.
Replace Existing Complex Data	Writes over existing complex for existing entities in the database.
Delete Entities	Deletes existing entries in the database.
  - e. Set **Start Time** to the hour, minute, and second that the import is scheduled to begin.
  - f. Set **Frequency** to one of the following:
    - Daily
    - Weekly
    - Monthly
3. In the **Field Separator** field, enter the character that is used to separate fields in the import file. The default character is a comma.
4. In the **Multiple Value Separator** field, enter the character that is used to separate multiple values within a field.
5. To activate the scheduled import, set **Status** to “Enabled.”

*Import Settings*

## Step 2: Complete the Import File Information

1. Set **Server Type** to one of the following:

Local Server                      Imports the data from the same server where Magento is installed.

Remote FTP                      Imports the data from a remote server.

*Import File Information*

2. Enter the **File Directory** where the import file originates.
  - For Local Server, enter a relative path in the Magento installation. For example, var/import.
  - For Remote FTP server, enter the full URL and path to the import folder on the remote server.
3. Enter the **File Name** to be imported.

4. In the **Images File Directory** field, enter the path to the directory where product images are stored. On a local server, enter a relative path such as: `var/import`.

### Step 3: Configure the Import Failed Emails

1. Set **Failed Email Receiver** to the store contact who is to receive notification if an error occurs during the import.
2. Set **Failed Email Sender** to the store contact that appears as the sender of the notification.
3. Set **Failed Email Template** to the template that is used for the notification.
4. In the **Send Failed Email Copy To** field, enter the email address of anyone who is to receive a copy of the notification. Separate multiple email addresses with a comma.
5. Set **Failed Email Copy Method** to one of the following:

**Bcc** Sends a blind courtesy copy of the failed import notification. The name and address of the recipient is included in the original email distribution, but hidden from view.

**Separate Email** Sends a copy of the failed import notification as a separate email.

*Import Failed Emails*

6. When complete, tap **Save**.

The new scheduled import job is added to the list on the Scheduled Import/Export page. From this page it can be run immediately for testing and edited. The import file is validated before the execution of each import job.

## Field Descriptions

FIELD	DESCRIPTION						
<b>IMPORT SETTINGS</b>							
Name	The name of the import. Helps you to distinguish it if many different scheduled imports are created.						
Description	(Optional) You can enter an additional description.						
Entity Type	Defines the data to be imported. Options: Products / Customers.						
Import Behavior	<p>Defines how complex data is handled if entities, which are being imported, already exist in the database. Complex data for products include categories, websites, custom options, tier prices, related products, up-sells, cross-sells, and associated products data. Complex data for customers include addresses. Options:</p> <table> <tr> <td>Append Complex Data</td><td>The new complex data will be added to the existing complex data for the already existing entries in the database. This is the default value.</td></tr> <tr> <td>Replace Existing Complex Data</td><td>The existing complex data for the already-existing entities will be replaced.</td></tr> <tr> <td>Delete Entities</td><td>If entities which are being imported already exist in the database, they will be deleted from the database.</td></tr> </table>	Append Complex Data	The new complex data will be added to the existing complex data for the already existing entries in the database. This is the default value.	Replace Existing Complex Data	The existing complex data for the already-existing entities will be replaced.	Delete Entities	If entities which are being imported already exist in the database, they will be deleted from the database.
Append Complex Data	The new complex data will be added to the existing complex data for the already existing entries in the database. This is the default value.						
Replace Existing Complex Data	The existing complex data for the already-existing entities will be replaced.						
Delete Entities	If entities which are being imported already exist in the database, they will be deleted from the database.						
Start Time	Set the start hour, minutes, and seconds of the import.						
Frequency	Define how often the import will be run. Options: Daily/Weekly/Monthly.						
On Error	<p>Define the system behavior in case errors are found during file validation. Options:</p> <table> <tr> <td>Stop Import</td><td>The file is not imported if any errors are found during validation. This is the default value.</td></tr> <tr> <td>Continue Processing</td><td>In case errors are found during validation, but importing is possible, the file is imported.</td></tr> </table>	Stop Import	The file is not imported if any errors are found during validation. This is the default value.	Continue Processing	In case errors are found during validation, but importing is possible, the file is imported.		
Stop Import	The file is not imported if any errors are found during validation. This is the default value.						
Continue Processing	In case errors are found during validation, but importing is possible, the file is imported.						
Status	The import is enabled by default. You can suspend it by setting the Status to Disabled.						
Field Separator	Determines the character that is used to separate fields. Default value: , (comma)						

**Field Descriptions (cont.)**

FIELD	DESCRIPTION
Multiple Value Separator	Determines the character that is used to separate multiple values within a field. Default value: , (comma)

**IMPORT FILE INFORMATION**

Server Type	You can import from a file located on the same server where Magento is deployed (select Local Server) or from the remote FTP server (select Remote FTP). If you select Remote FTP, additional options for credentials and file transfer settings appear.
File Directory	Specify the directory where the import file is located. If Server Type is set to Local Server, specify the path relative to the Magento installation directory. For example, var/import.
File Name	Specify the name of the import file.
Images File Directory	Enter the path to the directory where product images are stored. For a local server, enter a relative path. For example: var/import

**IMPORT FAILED EMAILS**

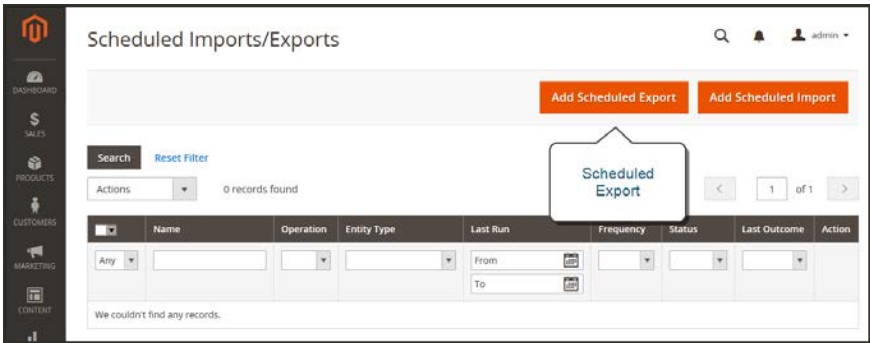
Failed Email Receiver	Specify the email address to which an email notification (failed import email) is sent if the import fails.
Failed Email Sender	Specify the email address that is used as the sender for the import failed email.
Failed Email Template	Select a template for the import failed email. By default, only the Import Failed (Default Template from Locale option is available. Custom templates can be created under System > Transactional Emails.
Send Failed Email Copy To	The email address to which a copy of import failed email is sent.
Send Failed Email Copy Method	Select the copy sending method for the import failed email.

# Scheduling an Export

Scheduled Export is similar to manual **Export**, with respect to the available export file format and types of entities that can be exported:

- You can export to .CSV format
- You can export product and customer data

The advantage of using Scheduled Export is that you can export data multiple times automatically, after specifying the export parameters, and schedule only once



*Add Scheduled Export*

The details of each export are not written to a log, but in case of failure you will receive an Export Failed email, which contains the error description. The result of the last export job appears in the Last Outcome column on the Scheduled Import/Export page.

After each export, the export file is placed in the user-defined location, and a copy of the file is placed in the `var/log/import_export` directory on the server where Magento is deployed. The timestamp and the marker of the exported entity (products or customers) and type of the operation (in this case, export) are added to the export file name.

## Process Overview

- Step 1: **Complete the Export Settings**
- Step 2: **Complete the Export File Information**
- Step 3: **Configure the Export Failed Emails**
- Step 4: **Choose the Entity Attributes**

## Step 1: Complete the Export Settings

1. On the Admin sidebar, tap **System**. Then under **Data Transfer**, choose **Scheduled Import/Export**.
2. In the upper-right corner, tap **Add Scheduled Export**. Then, do the following:
  - a. Enter a **Name** for the scheduled export.
  - b. Enter a brief **Description** that explains the purpose of the export, and how it is to be used.
  - c. Set **Entity Type** to one of the following:
    - Products
    - Customers

The Entity Attributes section at the bottom of the page is updated to reflect the selected Entity Type.
  - d. Set **Start Time** to the hour, minute, and second that the export is scheduled to begin.
  - e. Set **Frequency** to one of the following:
    - Daily
    - Weekly
    - Monthly
  - f. To activate the scheduled export, set **Status** to “Enabled.”
  - g. Accept “CSV” as the default **File Format**.

Export Settings

Name \*

Description

Entity Type \*

-- Please Select --

Start Time \*

00 : 00 : 00

Frequency \*

Daily

Status \*

Enabled

File Format \*

CSV

*Export Settings*

## Step 2: Complete the Export File Information

1. Set **Server Type** to one of the following:

Local Server                      To save the export file on the same server where Magento is installed.

Remote FTP                      To save the export file on a remote server.

Export File Information

Server Type \* Local Server

File Directory \*

For Type "Local Server" use relative path to Magento installation, e.g. var/export, var/import, var/export/some/dir

*Export File Information*

2. Enter the **File Directory** where the export file is to be saved as follow:
  - For Local Server, enter a relative path within the Magento installation. For example, var/export.
  - For Remote FTP server, enter the full URL and path to the target folder on the destination server.

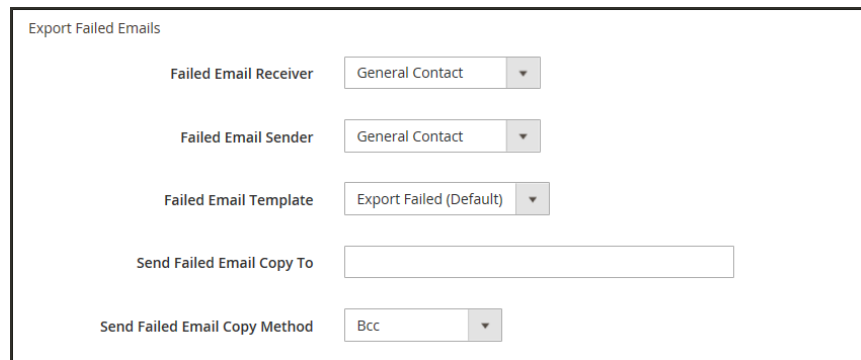
## Step 3: Configure the Export Failed Emails

1. Set **Failed Email Receiver** to the store contact who is to receive notification if an error occurs during the export.
2. Set **Failed Email Sender** to the store contact that appears as the sender of the notification.
3. Set **Failed Email Template** to the template that is used for the notification.
4. In the **Send Failed Email Copy To** field, enter the email address of anyone who is to receive a copy of the notification. Separate multiple email addresses with a comma.
5. Set **Failed Email Copy Method** to one of the following:

Bcc                                  Sends a blind courtesy copy. The name and address of the recipient is included in the original email distribution, but is hidden from view.

Separate Email                      Sends the copy as a separate email.





The screenshot shows a form titled "Export Failed Emails" with the following fields:

- Failed Email Receiver:** A dropdown menu with "General Contact" selected.
- Failed Email Sender:** A dropdown menu with "General Contact" selected.
- Failed Email Template:** A dropdown menu with "Export Failed (Default)" selected.
- Send Failed Email Copy To:** A text input field.
- Send Failed Email Copy Method:** A dropdown menu with "Bcc" selected.

*Export Failed Emails*

### Step 4: Choose the Entity Attributes

1. In the Entity Attributes section, choose the attributes that you want to include in the export data.
  - To filter export data by attributes value, enter the attribute value in the Filter column.
  - To exclude products or customers with certain attribute values, enter the values of the attributes that you want to exclude, and select the checkbox in the Skip column.
2. When complete, tap **Save**.

The new scheduled export job is added to the list on the Scheduled Import/Export page. From this page it can be run immediately, for testing, and edited.

## Field Descriptions

FIELD	DESCRIPTION				
<b>EXPORT SETTINGS</b>					
Name	The name of the export. Helps you to distinguish it if many different scheduled exports are created.				
Description	(Optional) A description of the scheduled export.				
Entity Type	Identifies the data to be exported. After the selection is made, the Entity Attributes appear below. Options include: Products /Customers.				
Start Time	Set the start hour, minutes, and seconds of the export.				
Frequency	Define how often the export job will be executed. Options include: Daily/Weekly/Monthly.				
Status	A new scheduled export is enabled by default. You can suspend it by setting Status to Disabled. Options include: Enabled/Disabled.				
File Format	Select the format of the export file. Currently only the .CSV option is available.				
<b>EXPORT SETTINGS INFORMATION</b>					
Server Type	Determines the location of the export file. Options include: <table> <tr> <td>Local Server</td><td>Places the export file on the same server where Magento is deployed.</td></tr> <tr> <td>Remote FTP</td><td>Places the export file on a remote server. Additional options for credentials and file transfer settings appear.</td></tr> </table>	Local Server	Places the export file on the same server where Magento is deployed.	Remote FTP	Places the export file on a remote server. Additional options for credentials and file transfer settings appear.
Local Server	Places the export file on the same server where Magento is deployed.				
Remote FTP	Places the export file on a remote server. Additional options for credentials and file transfer settings appear.				
File Directory	Specify the directory where the export file is placed. In case Server Type is set to Local Server, specify the relative to Magento installation path. For example, var/export.				
<b>EXPORT FAILED EMAILS</b>					
Failed Email Receiver	Specify the email address to which an email notification (export failed email) is sent if the export fails.				
Failed Email Sender	Specify the email address that is used as export failed email sender.				
Failed Email Template	Select a template for the failed export email. By default, only the Export Failed (Default Template from Locale) option is available.				

**Field Descriptions (cont.)**

FIELD	DESCRIPTION
Send Failed Email Copy To	The email address to which a copy of the failed export email is sent.
Send Failed Email Copy Method	Specify the copy sending method for the export failed email.

## Product Attribute Reference

The following table lists the attributes from a typical product export, in the default order in which they appear. Each attribute is represented in the CSV file as a column, and product records are represented by rows. Columns that begin with an underscore contain service data such as properties or option values for complex data.

The installation used to export this data has the sample data installed, and has two websites and several store views. Although this list includes all columns that are typically exported, the sku is the only required value. To import data, you can include only the columns with changes. The sku should be the first column, but the order of the rest of the attributes doesn't matter.

### Simple Product CSV File Structure

ATTRIBUTE	DESCRIPTION				
sku	<p>(Required) The Stock-Keeping Unit is a unique, alphanumeric identifier that is used to track inventory. A SKU can be up to 64 characters in length. For example: sku123</p> <div>A SKU longer than 64 characters will cause import to fail.</div>				
store_view_code	Identifies the specific store view(s) where the product is available. If blank, the product is available at the default store view. For example: storeview1,english,spanish				
attribute_set_code	Assigns the product to a specific attribute set or product template, according to product type. Once the product is created, the attribute set cannot be changed. For example: default				
product_type	<p>Indicates the type of product. Values:</p> <table> <tr> <td>simple</td><td>Tangible items that are generally sold as single units or in fixed quantities.</td></tr> <tr> <td>grouped</td><td>A group of separate products that is sold as a set.</td></tr> </table>	simple	Tangible items that are generally sold as single units or in fixed quantities.	grouped	A group of separate products that is sold as a set.
simple	Tangible items that are generally sold as single units or in fixed quantities.				
grouped	A group of separate products that is sold as a set.				

## Simple Product CSV File Structure (cont.)

ATTRIBUTE	DESCRIPTION
	<p><b>configurable</b> A product with multiple options that the customer must select before making a purchase. Inventory can be managed for each set of variations because they represent a separate product with a distinct SKU. For example, a combination of color and size for a configurable product is associated with a specific SKU in the catalog.</p> <p><b>virtual</b> A non-tangible product that does not require shipping and is not kept in inventory. Examples include services, memberships, and subscriptions.</p> <p><b>bundle</b> A customizable product set of simple products that are sold together.</p>
categories	<p>Indicates each category that is assigned to the product. Separate categories and subcategories with a forward slash. To indicate multiple category paths, separate each path with a pipe “ ” symbol. For example:</p> <p>Default Category/Gear Default Category/Gear/Bags</p>
product_websites	<p>The <b>website code</b> of each website where the product is available. A single product can be assigned to multiple websites, or limited to one. If specifying multiple websites, separate each with a comma and without a space. For example:</p> <p>base</p> <p>base,website2</p>
name	The product name appears in all product listings, and is the name that customers use to identify the product.
description	The product description provides detailed information about the product, and might include simple HTML tags.

**Simple Product CSV File Structure (cont.)**

ATTRIBUTE	DESCRIPTION								
short_description	The use of the short product description depends on the theme. It might appear in product listings and is sometimes used in RSS feed listings sent to shopping sites.								
weight	The weight of the individual product. The actual product weight is determined by the carrier at the time of shipment.								
product_online	Determines if the product is available for sale in the store. Values: <table> <tr> <td>1</td><td>(Yes) The product is enabled, and available for sale.</td></tr> <tr> <td>2</td><td>(No) The product is disabled, and is not available for sale.</td></tr> </table>	1	(Yes) The product is enabled, and available for sale.	2	(No) The product is disabled, and is not available for sale.				
1	(Yes) The product is enabled, and available for sale.								
2	(No) The product is disabled, and is not available for sale.								
tax_class_name	The name of the tax class that is associated with this product.								
visibility	Determines if the product is visible in the catalog, and made available for search. Values: <table> <tr> <td>Not Visible Individually</td><td>The product is not included in product listings, although it might be available as a variation of another product.</td></tr> <tr> <td>Catalog</td><td>The product appears in all catalog listings.</td></tr> <tr> <td>Search</td><td>The product is available for search operations.</td></tr> <tr> <td>Catalog, Search</td><td>The product is included in catalog listings and is also available for search.</td></tr> </table>	Not Visible Individually	The product is not included in product listings, although it might be available as a variation of another product.	Catalog	The product appears in all catalog listings.	Search	The product is available for search operations.	Catalog, Search	The product is included in catalog listings and is also available for search.
Not Visible Individually	The product is not included in product listings, although it might be available as a variation of another product.								
Catalog	The product appears in all catalog listings.								
Search	The product is available for search operations.								
Catalog, Search	The product is included in catalog listings and is also available for search.								
price	The price that the product is offered for sale in your store.								
special_price	The discounted price of the product during the specified date range.								
special_price_from_date	The beginning date of the time period when the special price is in effect.								

**Simple Product CSV File Structure (cont.)**

ATTRIBUTE	DESCRIPTION
special_price_to_date	The last date of the time period when the special price is in effect.
url_key	The part of the URL that identifies the product. The default value is based on the product name. For example: product-name
meta_title	The meta title appears in the title bar and tab of the browser and search results lists. The meta title should be unique to the product, incorporate high-value keywords, and be less than 70 characters in length.
meta_keywords	Meta keywords are visible only to search engines, and are ignored by some search engines. Choose high-value keywords, separated by a comma. For example: keyword1,keyword2,keyword3.
meta_description	Meta descriptions provide a brief overview of the product for search results listings. Ideally, a meta description should be between 150-160 characters in length, although the field accepts up to 255 characters.
base_image	The relative path for the main image on the product page. Magento stores files internally in an alphabetical folder structure. You can see the exact location of each image in the exported data. For example: /sample_data/m/b/mb01-blue-0.jpg To upload a new image or write over an existing image, enter the file name, preceded by a forward slash. For example: /image.jpg
base_image_label	The label that is associated with the base image.
small_image	The file name of the small image that is used on catalog pages, preceded by a forward slash. For example: /image.jpg
small_image_label	The label associated with the small image. For example: Small Image 1, Small Image 2
thumbnail_image	The file names of any thumbnail image to appear in the gallery on the product page, preceded by a forward slash. For example: /image.jpg

**Simple Product CSV File Structure (cont.)**

ATTRIBUTE	DESCRIPTION
thumbnail_image_label	The label associated with any thumbnail images. For example: Thumbnail 1, Thumbnail 2
created_at	Indicates the date when the product was created. The date is automatically generated when the product is created, but can be edited later.
updated_at	Indicates the date when the product was last updated.
new_from_date	Specifies the “from” date for new product listings, and determines if the product is featured as a new product.
new_to_date	Specifies the “to” date for new product listings, and determines if the product is featured as a new product.
display_product_options_in	If the product has multiple options, determines where they appear on the product page. Values: Product Info Column Block after Info Column
map_price	The minimum advertised price of the product. (Appears only if MAP is enabled.)
msrp_price	The manufacturer's suggested retail price for the product. (Appears only if MAP is enabled.)
map_enabled	Determines if Minimum Advertised Price is enabled in the configuration. Values:  1                    (Yes) MAP is enabled.  0 (or blank)      (No) MAP is not enabled.
gift_message_available	Determines if a gift message can be included with the product purchase. Values:  1                    (Yes) The option to include a gift message is presented to the customer.  0 (or blank)      (No) The option to include a gift message is not presented to the customer.
custom_design	Lists the available themes that can be applied to the product page.



**Simple Product CSV File Structure (cont.)**

ATTRIBUTE	DESCRIPTION												
custom_design_from	Specifies the beginning date when the selected theme is applied to the product page.												
custom_design_to	Specifies the end date when the selected theme is applied to the product page.												
custom_layout_update	Additional XML code that is applied as a layout update to the product page.												
page_layout	<p>Determines the page layout of the product page. Values:</p> <table> <tr> <td>No layout updates</td><td>No change is made to the page layout.</td></tr> <tr> <td>1 column</td><td>Applies a one- column layout to the product page.</td></tr> <tr> <td>2 columns with left bar</td><td>Applies a two-column layout with a left sidebar to the product page.</td></tr> <tr> <td>2 columns with right bar</td><td>Applies a two-column layout with a right sidebar to the product page.</td></tr> <tr> <td>3 columns</td><td>Applies a three-column layout to the product page.</td></tr> <tr> <td>empty</td><td>Applies a blank layout to the product page.</td></tr> </table>	No layout updates	No change is made to the page layout.	1 column	Applies a one- column layout to the product page.	2 columns with left bar	Applies a two-column layout with a left sidebar to the product page.	2 columns with right bar	Applies a two-column layout with a right sidebar to the product page.	3 columns	Applies a three-column layout to the product page.	empty	Applies a blank layout to the product page.
No layout updates	No change is made to the page layout.												
1 column	Applies a one- column layout to the product page.												
2 columns with left bar	Applies a two-column layout with a left sidebar to the product page.												
2 columns with right bar	Applies a two-column layout with a right sidebar to the product page.												
3 columns	Applies a three-column layout to the product page.												
empty	Applies a blank layout to the product page.												
product_options_container	<p>If the product has multiple options, determines where they appear on the product page. Values:</p> <p>Product Info Column</p> <p>Block after Info Column</p>												
msrp_display_actual_price_type	Determines where the actual price of a product is visible to the customer. Values:												

**Simple Product CSV File Structure (cont.)**

ATTRIBUTE	DESCRIPTION	
	In Cart	Displays the actual product price in the shopping cart.
	Before Order Confirmation	Displays the actual product price at the end of the checkout process, just before the order is confirmed.
	On Gesture	Displays the actual product price in a popup when the customer clicks the “Click for price” or “What’s this?” link.
country_of_manufacture	Identifies the country where the product was manufactured.	
additional_attributes	Additional attributes created for the product. For example: has_options=0,required_options=0 color=Black,has_options=0,required_options=0,size_general=XS	
qty	The quantity of the product that is currently in stock.	
out_of_stock_qty	The stock level that determines the product to be out of stock.	
use_config_min_qty	Determines if the default value from the configuration is used, and corresponds to the Use Config Settings checkbox. Values:	
	1	(Yes) The default configuration setting is used for the value of this attribute.
	0 (or blank)	(No) The default configuration can be overridden for the value of this attribute.
is_qty_decimal	Determines if the qty attribute has a decimal value. Values:	
	1	(Yes) The value of the qty attribute is a decimal value.
	0 (or blank)	(No) The value of the qty attribute is a whole number (integer).

**Simple Product CSV File Structure (cont.)**

ATTRIBUTE	DESCRIPTION
allow_backorders	Determines if your store allows backorders, and how they are managed.
use_config_backorders	<p>Determines if the default configuration setting for backorders is used, and corresponds to the state of the Use Config Settings checkbox. Values:</p> <p>1 (Yes) The default configuration setting is used for the value of this attribute.</p> <p>0 (or blank) (No) The default configuration can be overridden for the value of this attribute.</p>
min_cart_qty	Specifies the minimum quantity of the item that can be purchased in a single order.
use_config_min_sale_qty	<p>Determines if the default configuration setting for minimum quantity is used, and corresponds to the state of the Use Config Settings checkbox.. Values:</p> <p>1 (Yes) The default configuration setting is used for the value of this attribute.</p> <p>0 (or blank) (No) The default configuration can be overridden for the value of this attribute.</p>
max_cart_qty	Specifies the maximum quantity of the product that can be purchased in a single order.
use_config_max_sale_qty	<p>Determines if the default configuration setting for maximum quantity is used, and corresponds to the state of the Use Config Settings checkbox.. Values:</p> <p>1 (Yes) The default configuration setting is used for the value of this attribute.</p> <p>0 (or blank) (No) The default configuration can be overridden for the value of this attribute.</p>
is_in_stock	Indicates if the product is in stock.
notify_on_stock_below	Specifies the stock level that triggers an “out of stock” notification.
use_config_notify_stock_qty	Determines if the default configuration setting is used to trigger stock level notification, and corresponds to the state of the Use Config Settings checkbox. Values:

**Simple Product CSV File Structure (cont.)**

ATTRIBUTE	DESCRIPTION	
	1	(Yes) The default configuration setting is used for the value of this attribute.
	0 (or blank)	(No) The default configuration can be overridden for the value of this attribute.
manage_stock	Determines if inventory control is used to manage the product. Values:	
	1	(Yes) Activates full inventory control to manage stock levels of the product.
	0 (or blank)	(No) The system does not keep track of the number of items that are currently in stock.
use_config_manage_stock	Determines if the default configuration setting for managing stock is used, and corresponds to the state of the Use Config Settings checkbox. Values:	
	1	(Yes) The default configuration setting is used for the value of this attribute.
	0 (or blank)	(No) The default configuration can be overridden for the value of this attribute.
use_config_qty_increments	Determines if the default configuration setting for quantity increments is used, and corresponds to the state of the Use Config Settings checkbox.. Values:	
	1	(Yes) The default configuration setting is used for the value of this attribute.
	0 (or blank)	(No) The default configuration can be overridden for the value of this attribute.
qty_increments	Determines if the product is sold in quantity increments. Options: Yes / No	
use_config_enable_qty_inc	Determines if the default configuration setting to enable quantity increments is used, and corresponds to the state of the Use Config Settings checkbox. Values:	

**Simple Product CSV File Structure (cont.)**

ATTRIBUTE	DESCRIPTION
	1 (Yes) The default configuration setting is used for the value of this attribute.
	0 (or blank) (No) The default configuration can be overridden for the value of this attribute.
enable_qty_increments	Determines if quantity increments are enabled for the product.
is_decimal_divided	Determines if parts of the product can be shipped separately. Options: Yes / No
website_id	For installations with multiple websites, identifies a specific website where the product is available. If blank, the product is available in all websites.
related_skus	Lists the sku of each product that has been identified as a <b>Related Product</b> . For example: 24-WG080,24-UG03,24-UG01,24-UG02
crosssell_skus	Lists the sku of each product that has been identified as a <b>Cross-sell</b> .
upsell_skus	Lists the sku of each product that has been identified as an <b>Upsell</b> .
additional_images	The file names of any additional image to be associated with the product, preceded by a forward slash. For example: /image.jpg
additional_image_labels	The labels associated with any additional images. For example: Label 1, Label 2
custom_options	Specifies the properties and values assigned to each custom option. For example: name=Color,type=drop_down,required=1,price= price_ type=fixed, sku=,option_ title=Black name=Color,type=drop_ down,required=1,price=, price_type=fixed,sku=,option_ title=White

**SERVICE DATA FOR PRODUCT VARIATIONS**

**Simple Product CSV File Structure (cont.)**

ATTRIBUTE	DESCRIPTION
<code>_super_products_sku</code>	The generated SKU for a configurable product variation. For example: WB03-XS-Green  Applies to: Configurable Products
<code>_super_attribute_code</code>	The attribute code of a configurable product variation. For example: color  Applies to: Configurable Products
<code>_super_attribute_option</code>	The value of a configurable product variation. For example: green  Applies to: Configurable Products
<code>_super_attribute_price_corr</code>	A price adjustment that is associated with a configurable product variation.  Applies to: Configurable Products
<code>_associated_sku</code>	The SKU of a product that is associated with a grouped product.  Applies to: Grouped Products Bundle Products
<code>_associated_default_qty</code>	Determines the quantity of the associated product that is included. Applies to: Configurable Products Grouped Products Bundle Products
<code>_associated_position</code>	Determines the position of the associated product when listed with other associated products. Applies to: Configurable Products Grouped Products Bundle Products

## Complex Data

The term **complex data**<sup>1</sup> refers to the data that is associated with multiple product options. The following product types use data that originates from separate products to create product variations and multiple options.

- **Configurable**
- **Grouped**
- **Bundle**

If you were to export a configurable product, you would find the standard attributes that make up a simple product, plus the additional attributes that are needed to manage complex data.

sku	store_view_code	attribute_set_code	product_type	categories
WT08-XS-Black		Top	simple	Default/Collections/Default/Women/Default/Women/Tops/Default/Women/Tops/Bras & Tanks/Default/Promotions/Default/Promotions/Women Sale/Default/Collections/Perk
WT08-XL-Yellow		Top	simple	Default/Collections/Default/Women/Default/Women/Tops/Default/Women/Tops/Bras & Tanks/Default/Promotions/Default/Promotions/Women Sale/Default/Collections/Perk
WT08-XL-Purple		Top	simple	Default/Collections/Default/Women/Default/Women/Tops/Default/Women/Tops/Bras & Tanks/Default/Promotions/Default/Promotions/Women Sale/Default/Collections/Perk
WT08-XL-Black		Top	simple	Default/Collections/Default/Women/Default/Women/Tops/Default/Women/Tops/Bras & Tanks/Default/Promotions/Default/Promotions/Women Sale/Default/Collections/Perk
WT08-L-Yellow		Top	simple	Default/Collections/Default/Women/Default/Women/Tops/Default/Women/Tops/Bras & Tanks/Default/Promotions/Default/Promotions/Women Sale/Default/Collections/Perk
WT08-L-Purple		Top	simple	Default/Collections/Default/Women/Default/Women/Tops/Default/Women/Tops/Bras & Tanks/Default/Promotions/Default/Promotions/Women Sale/Default/Collections/Perk
WT08-L-Black		Top	simple	Default/Collections/Default/Women/Default/Women/Tops/Default/Women/Tops/Bras & Tanks/Default/Promotions/Default/Promotions/Women Sale/Default/Collections/Perk
WT08-M-Yellow		Top	simple	Default/Collections/Default/Women/Default/Women/Tops/Default/Women/Tops/Bras & Tanks/Default/Promotions/Default/Promotions/Women Sale/Default/Collections/Perk
WT08-M-Purple		Top	simple	Default/Collections/Default/Women/Default/Women/Tops/Default/Women/Tops/Bras & Tanks/Default/Promotions/Default/Promotions/Women Sale/Default/Collections/Perk
WT08-M-Black		Top	simple	Default/Collections/Default/Women/Default/Women/Tops/Default/Women/Tops/Bras & Tanks/Default/Promotions/Default/Promotions/Women Sale/Default/Collections/Perk
WT08-S-Yellow		Top	simple	Default/Collections/Default/Women/Default/Women/Tops/Default/Women/Tops/Bras & Tanks/Default/Promotions/Default/Promotions/Women Sale/Default/Collections/Perk
WT08-S-Purple		Top	simple	Default/Collections/Default/Women/Default/Women/Tops/Default/Women/Tops/Bras & Tanks/Default/Promotions/Default/Promotions/Women Sale/Default/Collections/Perk
WT08-S-Black		Top	simple	Default/Collections/Default/Women/Default/Women/Tops/Default/Women/Tops/Bras & Tanks/Default/Promotions/Default/Promotions/Women Sale/Default/Collections/Perk
WT08-XS-Yellow		Top	simple	Default/Collections/Default/Women/Default/Women/Tops/Default/Women/Tops/Bras & Tanks/Default/Promotions/Default/Promotions/Women Sale/Default/Collections/Perk
WT08-XS-Purple		Top	simple	Default/Collections/Default/Women/Default/Women/Tops/Default/Women/Tops/Bras & Tanks/Default/Promotions/Default/Promotions/Women Sale/Default/Collections/Perk
WT08			configurable	Default/Collections/Default/Women/Default/Women/Tops/Default/Women/Tops/Bras & Tanks/Default/Promotions/Default/Promotions/Women Sale/Default/Collections/Perk

*Exported Configurable Product Data*

### Complex Data Attributes

#### ATTRIBUTE

E

DESCRIPTION

#### CONFIGURABLE PRODUCTS

**configurable** Labels that identify product variations. For example:

**e\_variation\_labels** Choose Color:  
Choose Size:

**configurable** Describes the values associated with a product variation. For example:

**e\_variations** sku=sku-red  
xs,color=red,size=xs,price=10.99,display=1,image=/pub/media/import/image1.png  
sku=sku-red-  
m,color=red,size=m,price=20.88,display=1,image=/pub/media/import/image2.png

<sup>1</sup>Data that is associated with multiple product options.

**Complex Data Attributes (cont.)**

ATTRIBUTE	DESCRIPTION
<b>GROUPED PRODUCTS</b>	
associated_skus	Identifies the SKUs of the individual products that make up the group.
<b>BUNDLE PRODUCTS</b>	
bundle_price_type	Determines if the price of a bundle item is fixed or dynamic.
bundle_sku_type	Determines if each item is assigned a variable, dynamic SKU, or if a fixed SKU is used for the bundle. Options include: Fixed / Dynamic.
bundle_weight_type	Determines if the weight of a bundle item is variable or fixed.
bundle_values	Describes each value associated with a bundle option. For example: name=Bundle Option One,type=dropdown; required=1, sku=sku-option2,price=10, price_type=fixed



## Advanced Pricing

Advanced Price Import/Export allows you to quickly update pricing information for product groups and tier prices. The process to **import** and **export** advanced price data is the same as any other entity type. The sample CSV file contains tier and group prices for each product type that supports advanced pricing. Making changes to advanced pricing does not affect the rest of the product record.

	A	B	C	D	E	F	G	H	I
1	sku	tier_price_website	tier_price_customer_group	tier_price_qty	tier_price	group_price_website	group_price_customer_group	group_price_price	
2	sku123	website1	General	2	10				
3	sku124	All Websites [USD]	ALL GROUPS	3	15				
4	sku123					website1	General		11
5	sku124					All Websites [USD]	General		12

*Advanced Price Sample File*

### Advanced Pricing Attributes

ATTRIBUTE	DESCRIPTION
sku	<p>(Required) The Stock-Keeping Unit is a unique, alphanumeric identifier that is used to track inventory. A SKU can be up to 64 characters in length. For example: sku123</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;">A SKU longer than 64 characters will cause import to fail.</div>
tier_price_website	<p>The <b>website code</b> identifies each website where tier pricing is available. For example:</p> <p>website1</p> <p>All Websites [USD]</p>
tier_price_customer_group	<p>Identifies the <b>customers groups</b> where tier pricing is available. For example:</p> <p>ALL GROUPS</p> <p>NOT LOGGED IN</p> <p>General</p> <p>Wholesale</p> <p>Retailer</p>
tier_price_qty	<p>The quantity of the product that must be ordered to receive the tier price discount.</p>
tier_price	<p>The discounted tier price of the product. For <b>bundle</b> products, tier price is calculated as a percentage.</p>
group_price_website	<p>The <b>website code</b> of each website where group pricing is available. If specifying multiple websites, separate each with a comma and without a space. For example:</p> <p>website1</p>

**Advanced Pricing Attributes (cont.)**

ATTRIBUTE	DESCRIPTION
	All Websites [USD]
group_price_customer_group	Identifies the <b>customers groups</b> where group pricing is available. For example: NOT LOGGED IN General Wholesale Retailer
group_price	The discounted group price of the product. For <b>bundle</b> products, group price is calculated as a percentage.

## Customer Attribute Reference

The following tables list the attributes from a typical export of the Customers Main File and Customer Addresses. The installation that was used to export this data has two websites and several store views, with the sample data installed.

Each attribute, or field, is represented in the CSV file as a column, and customer records are represented by rows. Columns that begin with an underscore are service entities that contain properties or complex data.

### Customers Main File

ATTRIBUTE	DESCRIPTION
email	
_website	
_store	
confirmation	
created_at	
created_in	
disable_auto_group_change	
dob	
firstname	
gender	
group_id	
lastname	
middlename	
password_hash	
prefix	
rp_token	
rp_token_created_at	
store_id	
suffix	

**Customers Main File (cont.)**

ATTRIBUTE	DESCRIPTION
taxvat	
website_id	
password	

**Customer Addresses**

ATTRIBUTE	DESCRIPTION
_website	
_email	
_entity_id	
city	
company	
country_id	
fax	
firstname	
lastname	
middlename	
postcode	
prefix	
region	
region_id	
street	
suffix	
telephone	
vat_id	
vat_is_valid	
vat_request_date	
vat_request_id	

**Customer Addresses (cont.)**

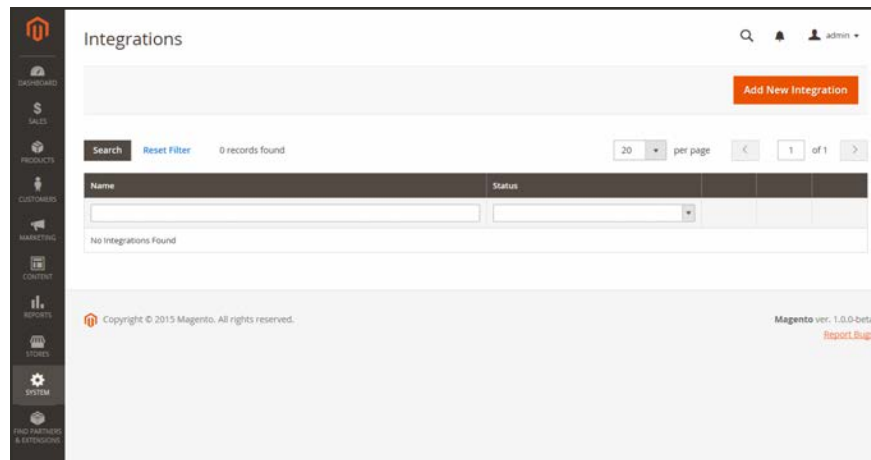
ATTRIBUTE	DESCRIPTION
vat_request_success	
_address_default_billing_	Identifies the default billing address. A value of 1 indicates that the address is the default billing address of the customer. Values: 1 / 0
_address_default_shipping_	Identifies the default shipping address. A value of 1 indicates that the address is the default shipping address of the customer. Values: 1 / 0



## CHAPTER 89:

# Integrations

Establishes the location of OAuth credentials and redirect URL for third-party integrations, and identifies the available API resources that are needed for the integration.



*Integrations*

## Onboarding Workflow

- 1 Authorize the integration.** Go to the system/integration screen, find the relevant integration, and authorize.
- 2 Verify and establish login.** When prompted, accept the access requested. If redirected to a third-party, log in to the system, or create a new account. After a successful login, you return to the integration page.
- 3 Receive confirmation of authorized integration.** The system sends notification that the integration has been authorized successfully. After setting up an integration and receiving the credentials, it is no longer necessary to make calls to access or request tokens.

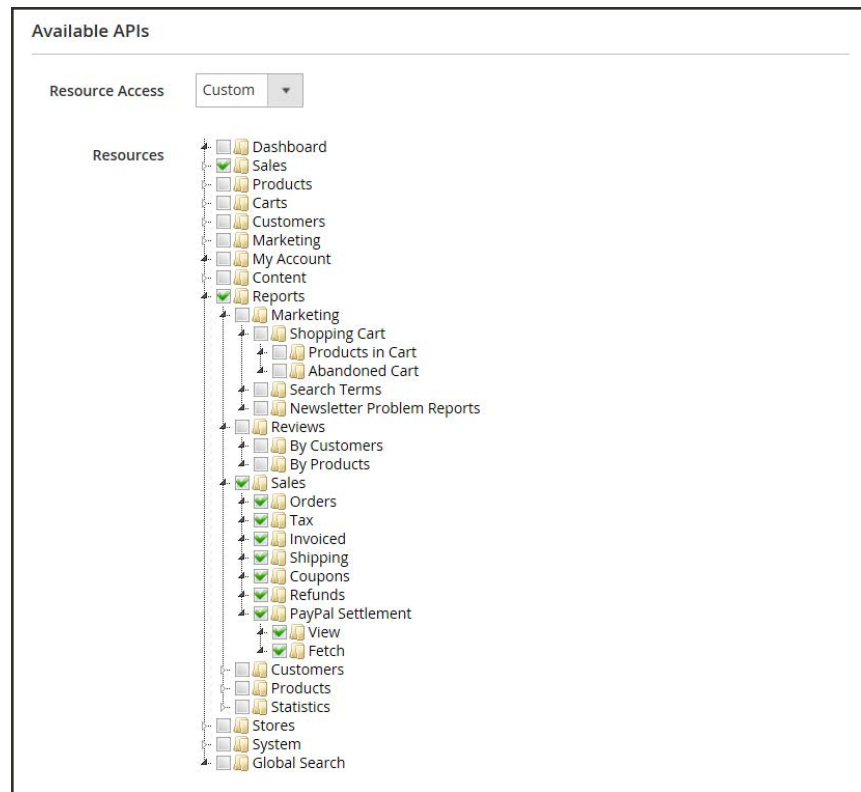


### To add a new integration:

1. On the Admin sidebar, tap **System**. Then under **Extensions**, choose **Integrations**.
2. Enter the following Integration Info:
  - a. Enter the **Name** of the integration, and the contact **Email** address.
  - b. Enter the **Callback URL** where OAuth credentials can be sent when using OAuth for token exchange. We strongly recommend using https://.
  - c. Enter the **Identity Link URL** to redirect the users to a third-party account with these Magento integration credentials.

### *New Integration*

3. In the panel on the left, choose **API**. Then, do the following:
  - a. Set **Resource Access** to one of the following:
    - All
    - Custom
  - b. For custom access, mark the checkbox of each resource that is needed:



*Resources Needed for Custom Access*

4. When complete, tap **Save**.

**To change the API guest access security setting:**

By default, the system does not permit anonymous guest access to CMS, catalog, and other store resources. If you need to change the setting, do the following:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Services**, choose **Magento Web API**.
3. Expand the **Web API Security Setting** section.

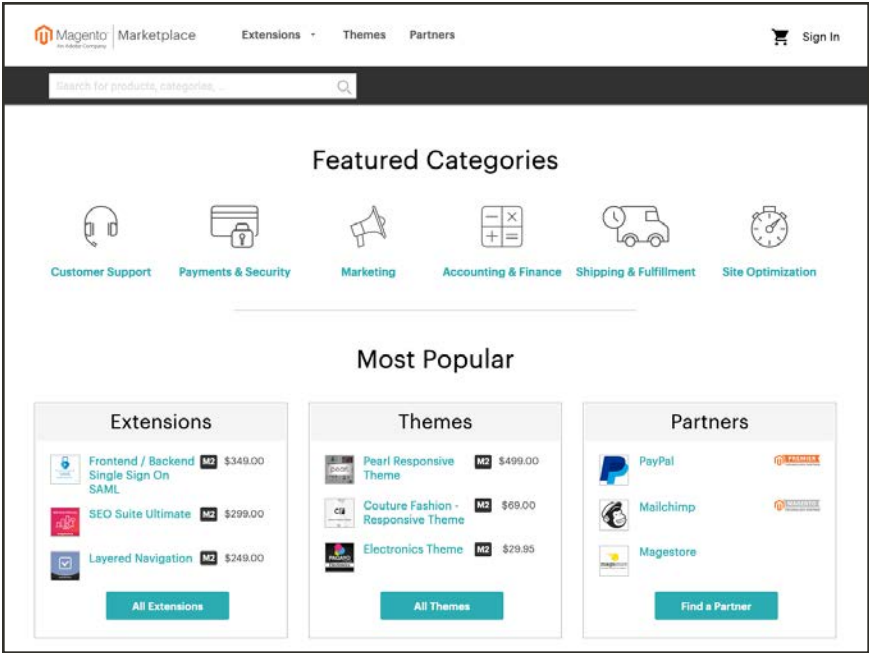
*Web API Security*

4. Set **Allow Anonymous Guest Access** to “Yes,”
5. When complete, tap **Save Config**.

To learn more, see: “[Restricting access to anonymous web APIs](#)” in the Magento developer documentation.

# Magento Marketplace

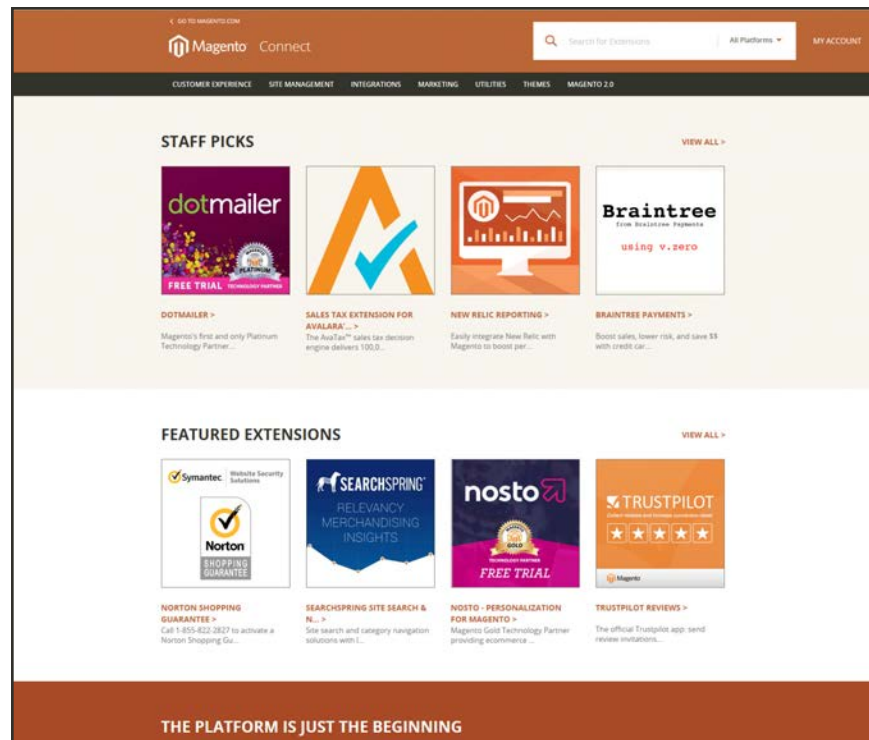
Magento Marketplace is our next generation application store that offers merchants a curated selection of solutions, and provides qualified developers the tools, platform, and prime location to build a thriving business. To learn more, see the [Magento Marketplace User Guide](#). For extension installation instructions, see [Component Manager](#) in this guide, or the [Marketplace Quick Tour](#).



Magento Marketplace

## Magento Connect

**Magento Connect** is Magento's original marketplace for Magento extensions. There are hundreds of extensions and themes available from all over the world. Magento out-of-the-box supports a few of the most popular ones. However, community members are developing and publishing new extensions in order to extend Magento with various new features.



*Magento Connect*



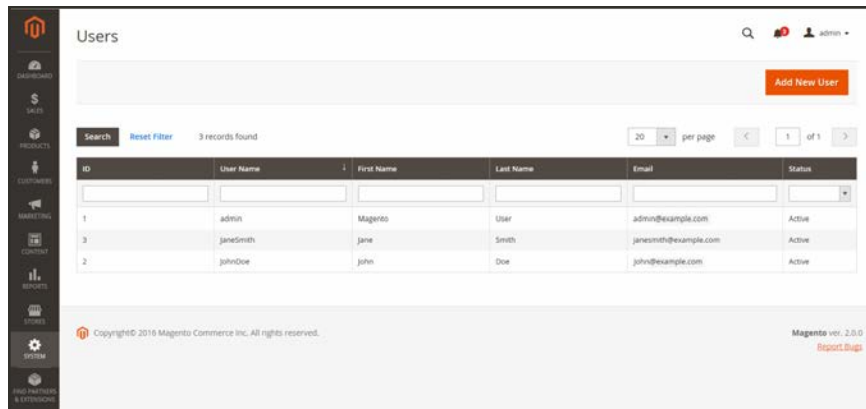
## CHAPTER 90:

# Permissions

Magento uses roles and permissions to create different levels of access to the Admin. When your store is first set up, you receive a set of login credentials for the Administrator role that has full permissions. However, you can restrict the level of permissions on a “need to know” basis for other people who work on your site. For example, a designer can be given access to only the Design tools, but not to areas with customer and order information.

In addition, you can further restrict Admin access to only a specific site, or set of sites and their associated data. If you have multiple brands or business units with separate stores on the same Magento installation, you can provide Admin access to each of your business units but hide and protect their data from other Admin users.

If an Admin user’s access is restricted to specific websites and/or stores, the websites and stores for which they are not authorized will either not be visible to them, or grayed-out as inactive. Only the sales and other data for permitted websites and stores is shown.



The screenshot shows the 'Users' management interface in the Magento Admin. It includes a sidebar with navigation links, a search bar, and a table of users. The table has columns for ID, User Name, First Name, Last Name, Email, and Status. There are three users listed: 'admin', 'janeSmith', and 'johnDoe'. The 'admin' user is the first entry, and the other two are listed below it. The 'Status' column shows 'Active' for all three users. The footer of the page indicates 'Copyright © 2016 Magento Commerce Inc. All rights reserved.' and 'Magento ver. 2.0.0'.

ID	User Name	First Name	Last Name	Email	Status
1	admin	Magento	User	admin@example.com	Active
3	janeSmith	Jane	Smith	janesmith@example.com	Active
2	johnDoe	John	Doe	john@example.com	Active

*All Users*

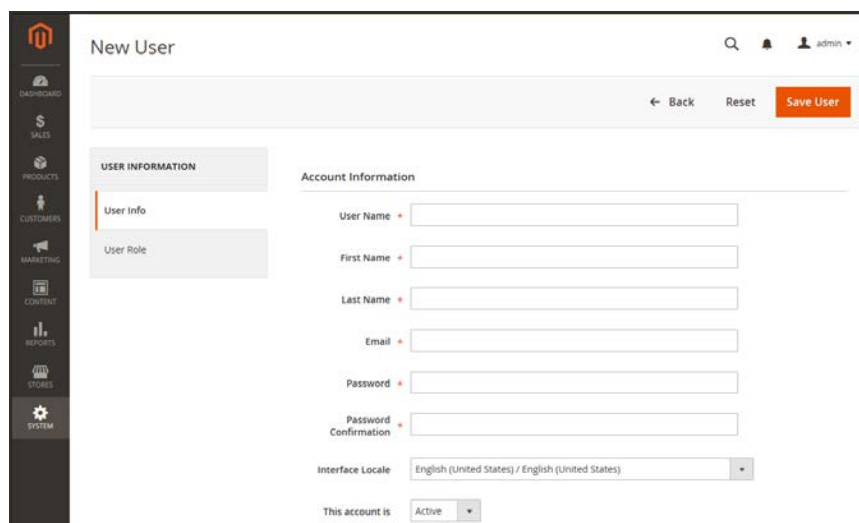
## Adding Users

When your store is first installed, your login credentials give you full administrative access. As a best practice, one of the first things you should do is to create another user account with full Administrator permissions. That way, you can use one account for your everyday Administrative activities, and reserve the other as a “Super Admin” account in case you forget your regular credentials or they somehow become unusable.

If there are others on your team, or service providers who need access, you can create a separate user account for each, and assign restricted access. To limit the websites or stores that admin users can access when they log in, you must first create a role with limited scope and access to resources. Then, you can assign the role to a specific user account. Admin users who are assigned to a restricted role can see and change data only for websites or stores that are associated with the role. They cannot make changes to any global settings or data.

### Step 1: Create a New User

1. On the Admin sidebar tap **System**. Then under **Permissions**, choose **All Users**.
2. In the upper-right corner, tap **Add New User**.
3. In the Account Information section, do the following:



*New User Account Information*



- a. Enter the **User Name** for account.

The User Name should be easy to remember. It is not case-sensitive. For example, if your user name is “John,” you can also log in as “john.”

- b. Complete the following information:

- First Name
- Last Name
- Email address

This email address must be different from the one that is associated with your original Admin account.

- c. Assign a **Password** to the account.

An Admin password must be seven or more characters long, and include both letters and numbers.


- d. In the **Password Confirmation** box, repeat the password to make sure it was entered correctly.

- e. If your store has multiple languages, set **Interface Locale** to the language to be used for the Admin interface.

4. Set **This Account is** to “Active.”

5. Under Current User Identity Verification, enter **Your Password**.

Current User Identity Verification

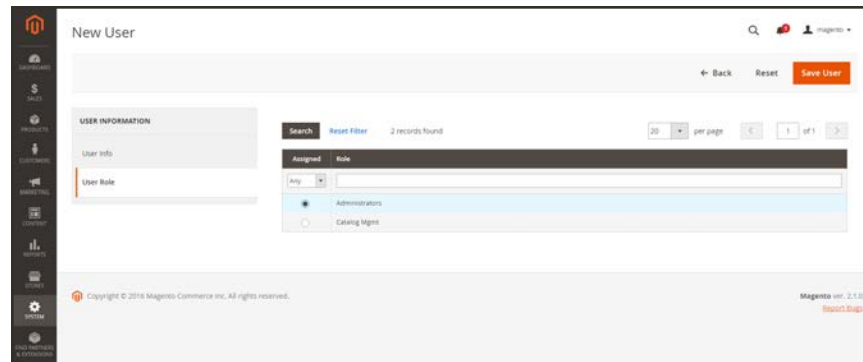
Your Password 

*Current User Identity Verification*

## Step 2: Define the Role

1. In the panel on the left, choose **User Role**. The grid lists all the existing roles. For a new store, Administrators is the only role available.
2. In the Assigned column, select the **Administrators** option.
3. Tap **Save User**.

You now have two accounts with Administrator access.



*Add New User Role*

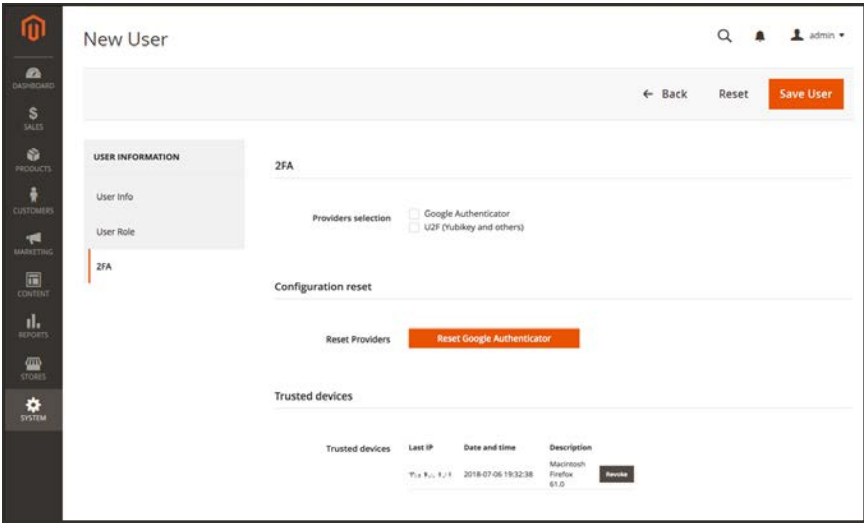
## Step 3: Define Authenticator

If you have **installed** and **enabled** Magento Two-Step Authentication, you can select a required authenticator per account.

With one or more authenticators enabled for the Magento Admin, you can require one or more authenticators per Admin user account. For this option, keep the Use system value checkbox checked for Force providers and enable/configure supported authenticator providers.

We recommend only enabling one authenticator per account. Users must authenticate using every authenticator you select for their account. For example, if you select Google and U2F, the user must access with a Google Authenticator code and connect a U2F device.

1. In the panel on the left, choose **2FA**.
2. For **Providers selected**, select one or more authenticators.
3. Tap **Save User**.



Select authenticator for user

If you have issues with authenticators, see [Magento Two-Step Authentication](#) for troubleshooting and additional management tools.

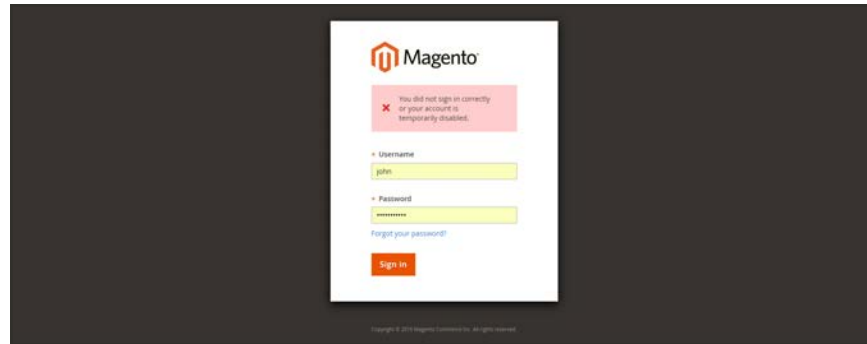
Admin Password Requirements

FIELD	DESCRIPTION
Password	An Admin password must be seven or more characters long, and include both letters and numbers. For additional password options, see: <a href="#">Configuring Admin Security</a> .

## Locked Users

For the security of your business, user accounts are locked by default after six failed attempts to **log in** to the Admin. Any user account that is currently locked appears in the Locked Users grid. An account can be unlocked by any other user with full Administrator permissions.

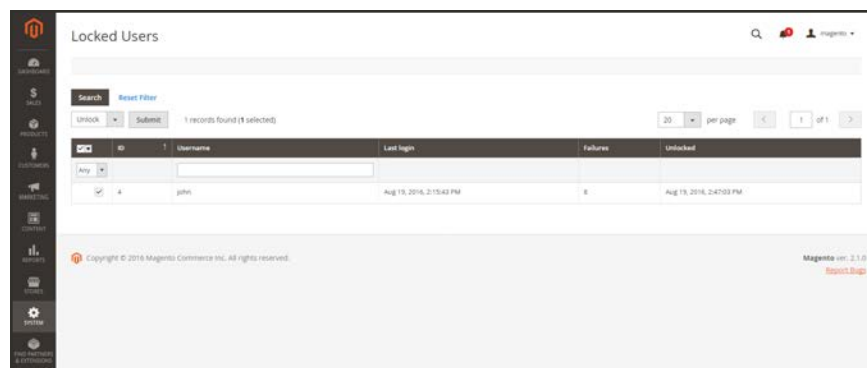
Additional password security measures can be implemented in the **Advanced Admin** configuration. To learn more, see: **Configuring Admin Security**.



*Admin Account Disabled*

### To unlock an admin account:

1. On the Admin sidebar, tap **System**. Then under **Permissions**, choose **Locked Users**.
2. In the grid, mark the checkbox of the locked account.

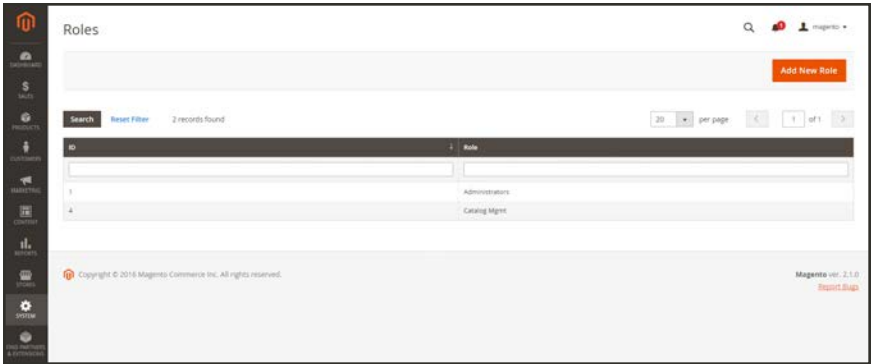


*Locked Users*

3. In the upper-left corner, set the **Actions** control to “Unlock.”
4. Tap **Submit** to unlock the account.

# User Roles

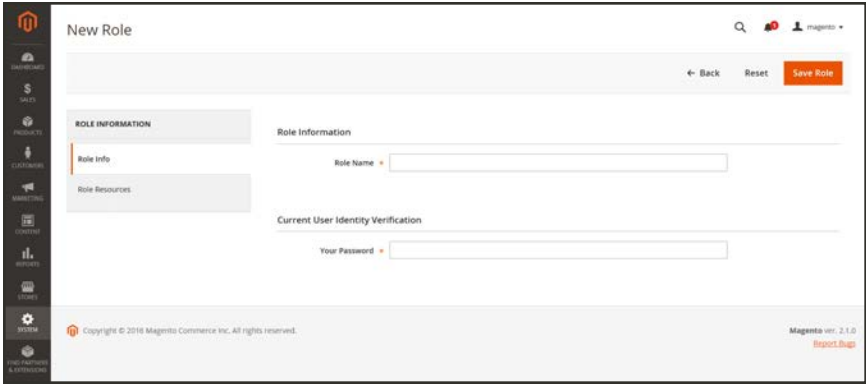
To give someone restricted access to the Admin, the first step is to create a role that has the appropriate level of permissions. After the role is saved, you can add new users and assign the restricted role to grant them limited access to the Admin.



*Roles*

Step 1: Define the Role

- 1. On the Admin sidebar, tap **System**. Then under **Permissions**, choose **User Roles**.
- 2. In the upper-right corner, tap **Add New Role**.
- 3. Under Role Information, enter a descriptive **Role Name**. Then under Current User Identity Verification, enter **Your Password**.



Role Name

Step 2: Assign Resources

**Important!** When assigning resources, be sure to disable access to the Permissions tool if you are limiting access for a given role. Otherwise, users will be able to modify their own permissions.

- 1. Set **Role Scopes** to one of the following:
  - All
  - Custom

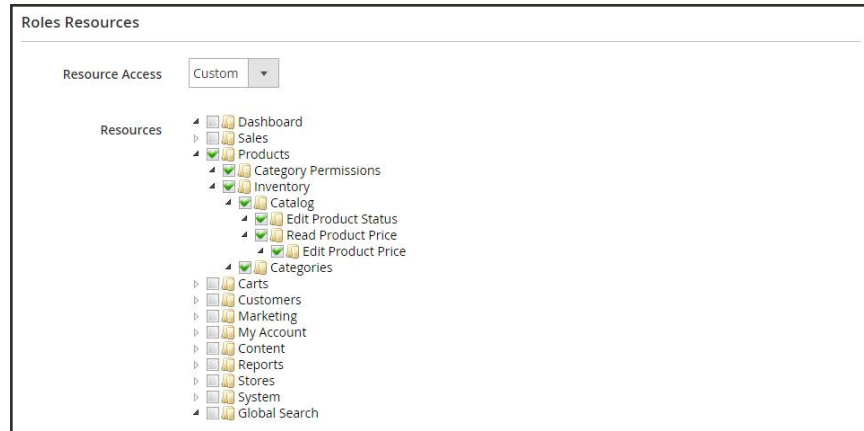
If set to “Custom” for a multisite installation, mark the checkbox of the website and store where the role is to be used.



Custom Role Scope

- 2. Under Roles Resources, set **Resource Access** to “Custom.”
- 3. In the tree, mark the checkbox of each Admin **Resource** that the role can access.

To create an Admin role with access to tax settings, choose both the Sales/Tax and System/Tax resources. If setting up a website for a region that differs from your default **shipping point of origin**, you must also allow access to the System/Shipping resources for the role. The shipping settings determine the store tax rate that is used for catalog prices.



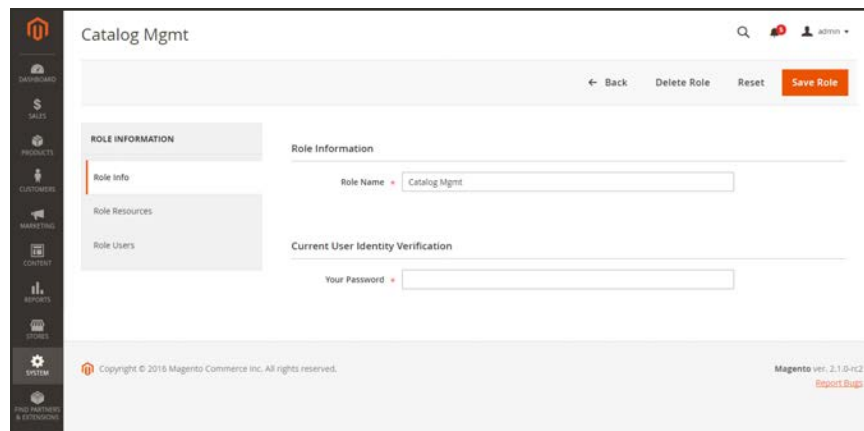
*Role Resources Assigned*

4. When complete, tap **Save Role**.

The role now appears in the grid, and can be assigned to new user accounts.

### To edit a role:

1. In the Roles grid, and tap the row to open the record in edit mode.
2. Under Current User Identity Verification, enter **Your Password**.

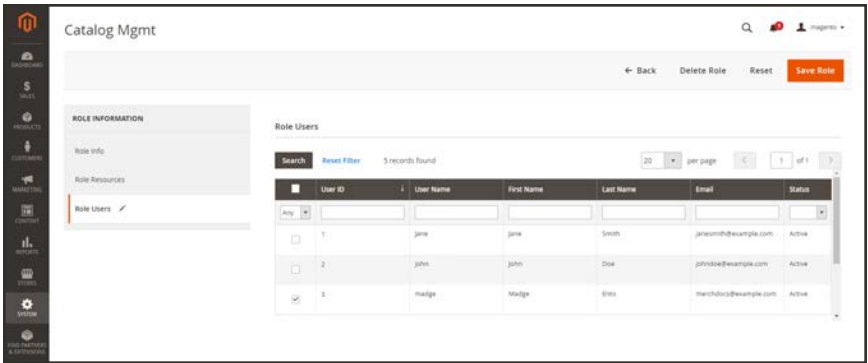


*Editing a Role*

3. In the panel on the left, choose **Role Users**.

The Role Users option appears only after a new role is saved.

- 4. To search for a specific user record, do the following:
  - a. Enter the value in the search filter at the top of a column. Then, press **Enter**.
  - b. When you are ready to return to the full list, click **Reset Filter**.
- 5. Mark the checkbox of any user(s) to be assigned to the role.
- 6. Tap **Save Role**.



Role Users

# Role Resources

Access to the following resources can be assigned to a custom role. See the linked page to learn more about the capabilities that are associated with each role.

## Role Resources

ROLE		DESCRIPTION
Dashboard		
Sales	Operations	Orders
		Invoices
		Shipments
		Credit Memos
		Returns
		Billing Agreements
		Transactions
		Archive
Shopping Cart Management		



**Role Resources (cont.)**

ROLE	DESCRIPTION	
Products	Category Permissions	
	Inventory	
Carts	Shopping Cart Management	
Customers	All Customers	
	Now Online	
	Segments	
Marketing	Promotions	Catalog Price Rule Related Products Rules Cart Price Rules Gift Card Accounts
	Private Sales	Events Invitations
	Communications	Email Templates Newsletter Template Newsletter Queue Newsletter Subscribers Email Reminders
	SEO & Search	Search Terms URL Rewrites Search Synonyms Site Map
	User Content	Reviews
	My Account	
Content	Staging	
	Elements	Pages Hierarchy Blocks

**Role Resources (cont.)**

ROLE	DESCRIPTION	
		Banners Widgets Media Gallery
	Design	Themes Schedule
Reports	Marketing Reviews Sales Customers Products Private Sales Statistics	
Stores	Settings	All Stores Configuration Terms & Conditions Order Status
	Taxes	
	Currency	Currency Rates Currency Symbols
	Attributes	Customer Attributes Product Update Attributes Attribute Set Returns Ratings
	Other Settings	Customer Groups Reward Exchange Rates Gift Wrapping Gift Registry
System	Data Transfer	Import Export

**Role Resources (cont.)**

ROLE	DESCRIPTION
	<a href="#">Import/Export Tax Rates</a> <a href="#">Import History</a> <a href="#">Scheduled Import/Export</a>
<a href="#">Magento Connect</a>	<a href="#">Connect Manager</a> <a href="#">Package Extensions</a>
<a href="#">Tools</a>	<a href="#">Support</a> <a href="#">Cache Management</a> <a href="#">Web Setup Wizard</a> <a href="#">Backups</a> <a href="#">Index Management</a> <a href="#">Change Indexer Mode</a>
<a href="#">Permissions</a>	<a href="#">All Users</a> <a href="#">Locked Users</a> <a href="#">User Roles</a>
<a href="#">Action Log</a>	<a href="#">Report</a> <a href="#">Archive</a>
<a href="#">Other Settings</a>	<a href="#">Notifications</a> <a href="#">Custom Variables</a> <a href="#">Manage Encryption Key</a>
<a href="#">Global Search</a>	





## CHAPTER 91: **Alternate Media Storage**

Magento Commerce gives you the option to store media files in a database on a database server, or on a Content Delivery Network (CDN), as opposed to storing them on the file system of the web server. The advantage of using alternate storage is that it minimizes the effort required to synchronize media when multiple instances of the system that are deployed on different servers that need access to the same images, CSS files, and other media files.

- **Database**
- **Content Delivery Network (CDN)**

## Using a Database

By default, all images, compiled CSS files, and compiled JavaScript files of the Magento instance are stored in the file system on the web server. You can choose to store these files in a database on a database server. One advantage of this approach is the option of automatic synchronization and reverse synchronization between the web server file system and the database. You can use the default database to store media or create a new one. To be able to use a newly created database as media storage, you must add information about it and its access credentials to the `local.xml` file.

### Database Workflow

- 1 Browser requests media.** A page from the store opens in the customer's browser, and the browser requests the media that is specified in the HTML.
- 2 System looks for media in file system.** The system searches for the media in the file system and if found, passes it to the browser.
- 3 System locates media in database.** If the media is not found in the file system, a request for the media is sent to the database that is specified in the configuration.
- 4 System locates media in database.** A PHP script transfers the files from the database to the file system, and sent to the customer's browser. The browser request for media triggers the script to run as follows:
  - If web server **rewrites** are enabled for Magento and supported by the server, the PHP script runs only when the requested media is not found in the file system.
  - If web server rewrites are disabled for Magento, or not supported by the server, the PHP script runs anyway, even if the required media is available in the file system.

### To use a database for media storage:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Advanced**, choose **System**.
3. In the upper-left corner set **Store View** to “Default Config,” to apply the configuration at the global level.
4. Expand ☑ the **Storage Configuration for Media** section. Then, do the following:

#### *Storage Configuration for Media (Database)*

- a. Set **Media Storage** to “Database.”
  - b. Set **Select Media Database** to the database you want to use.
  - c. Tap **Synchronize** to transfer the existing media to the newly selected database.
  - d. Enter the **Environment Update Time** in seconds.
5. When complete, tap **Save Config**.

## Using a Content Delivery Network

Storing media files in a CDN is another alternative supported in Magento. There is no full integration with a specific CDN, and you are responsible for choosing and configuring a CDN on your own.

After configuring the CDN, you must complete the configuration from the Admin. The changes can be made at either the global or website level. When a CDN is used for media storage, all paths to media on store pages are changed to the CDN paths that are specified in the configuration.

### CDN Workflow

1

**Browser requests media.** A page from the store opens in the customer's browser, and the browser requests the media that is specified in the HTML.

2

**Request sent to CDN; images found and served.** The request is sent first to the CDN. If the CDN has the images in storage, it serves the media files to the customer's browser.


3

**Media not found, request sent to Magento web server.** If the CDN doesn't have the media files, the request is sent to the Magento web server. If the media files are found in the file system, the web server sends them to the customer's browser.

**Important!** For security, when a CDN is used as media storage, JavaScript may not function properly if the CDN is located outside of your subdomain.



## To configure a content delivery network:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Web**.
3. In the upper-left corner, set **Store View** as needed.
4. Expand  the **Base URLs** section. Then, do the following:

### Base URLs

- a. Update the **Base URL for Static View Files** with the URL of the location on the CDN where static view files are stored.
- b. Update the **Base URL for User Media Files** with the URL of the JavaScript files on the CDN.

Both these fields can be left blank, or can start with the placeholder: `{{unsecure_base_url}}`

5. Expand the **Base URLs (Secure)** section.

### Base URLs (Secure)

- a. Update the **Secure Base URL for Static View Files** with the URL of the location on the CDN where static view files are stored.
- b. Update the **Secure Base URL for User Media Files** with the URL of the JavaScript files on the CDN.

Both these fields can be left blank, or can start with the placeholder: `{{unsecure_base_url}}`

6. When complete, tap **Save Config.**

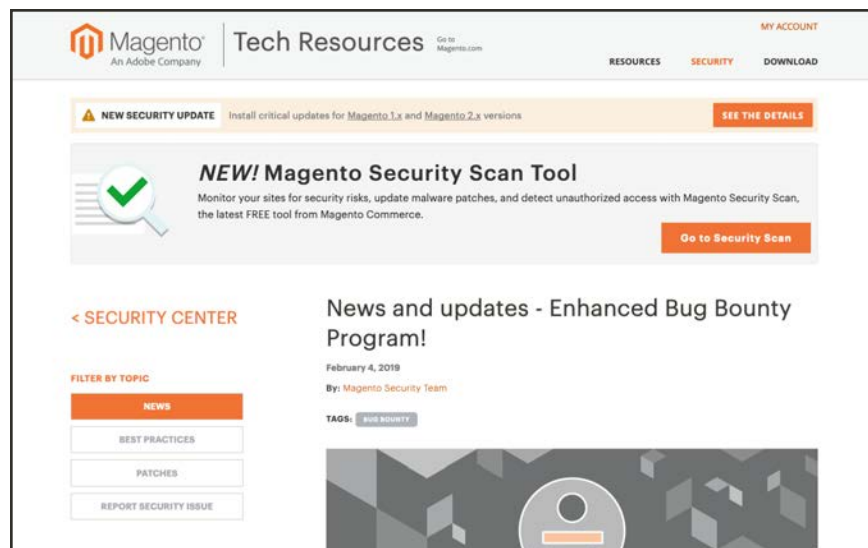
## CHAPTER 92:

# Security

In this section of the guide, you will learn security best practices, how to manage Admin sessions and credentials, implement CAPTCHA, and manage website restrictions.

- [Security Best Practices](#)
- [Configuring Admin Security](#)
- [CAPTCHA](#)
- [reCAPTCHA](#)
- [Two-Factor Authentication](#)
- [Encryption Key](#)
- [Browser Capabilities Detection](#)
- [Action Log](#)

Stop by the [Security Center](#) and sign up for the Security Alert Registry to receive the latest information on potential vulnerabilities and best practices.



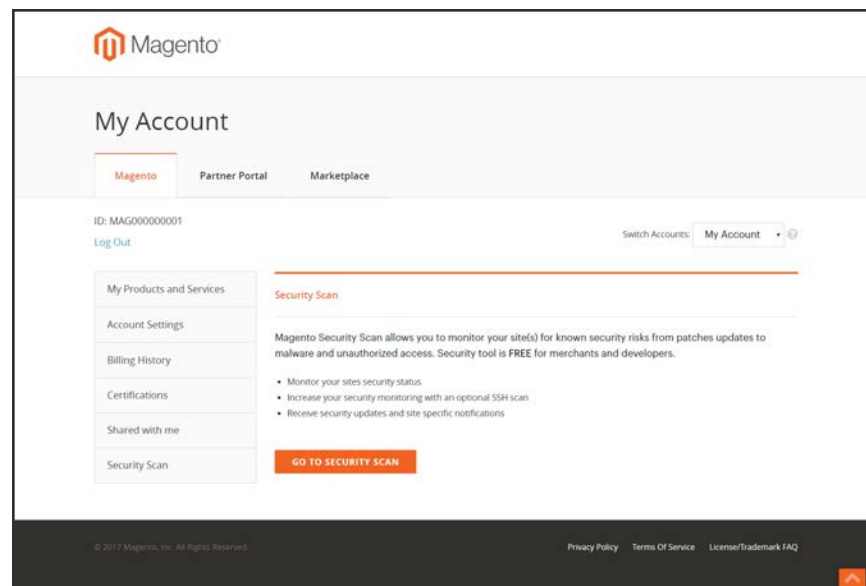
*Security Center*

## Security Scan

Magento Security Scan allows you to monitor each of your Magento sites for known security risks, and to receive patch updates and security notifications.

- Gain insight into the real-time security status of your store.
- Schedule security scan to run weekly, daily, or on demand.
- Receive reports with the results of over thirty security tests and the recommended corrective actions for each failed test.
- Maintain a history of security reports in your Magento account.

The Security Scan tool is available for free from the dashboard of your Magento account.

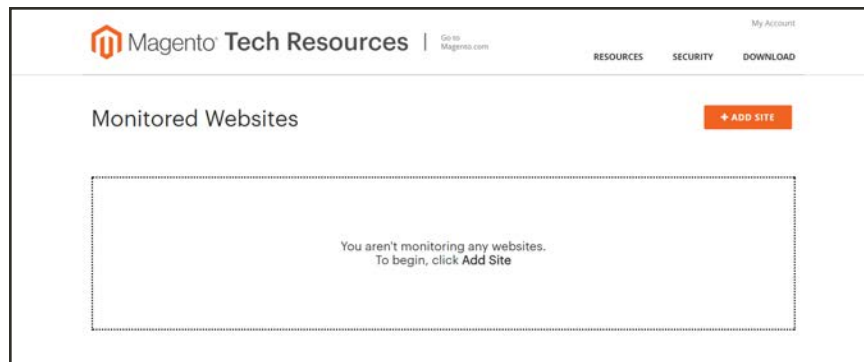


*Security Scan*

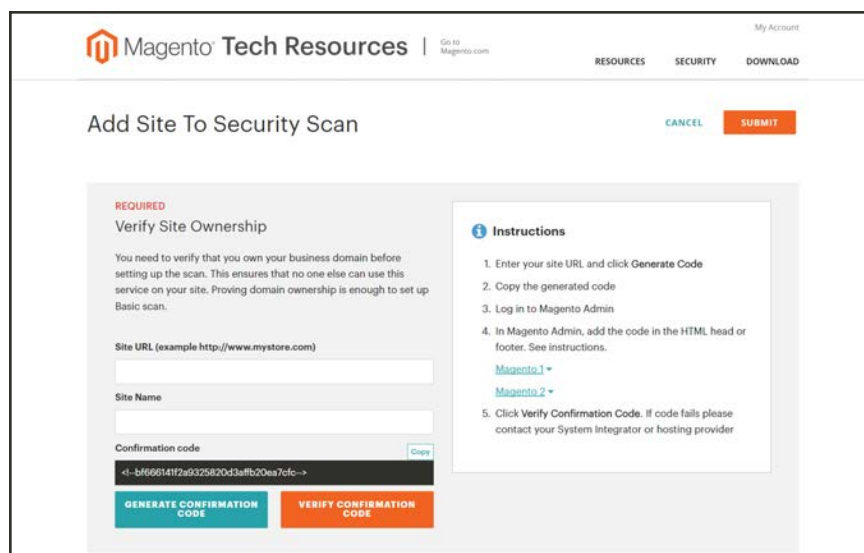
### To run Security Scan:

1. Go to the Magento home page, and sign in to your **Magento account**. Then, do the following:
  - a. In the panel on the left, choose **Security Scan**. Then, tap **Go to Security Scan**.
  - b. Read the **Terms and Conditions**. Then, tap **Agree** to continue.
2. On the **Monitored Websites** page, tap **+Add Site**.

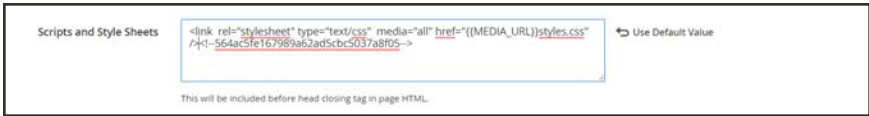
If you have multiple sites with different domains, you must configure a separate scan for each domain.

*Monitored Sites*

3. To verify your ownership of the site domain, do the following:
  - a. Enter the **Site URL**, and tap **Generate Confirmation Code**.
  - b. Tap **Copy** to copy your confirmation code to the clipboard.

*Generate Confirmation Code*

4. Log in to the Admin of your store as a user with full Administrator privileges. Then, do the following:
  - a. In the Admin sidebar, choose **Content**. Then under **Design**, choose **Configuration**.
  - b. Find your site in the list, and click **Edit**.
  - c. Expand ☯ the **HTML Head** section.
  - d. Scroll down to **Scripts and Style Sheets**. Then, click in the text box at the end of any existing code, and press **Ctrl-V** to paste your confirmation code into the text box.



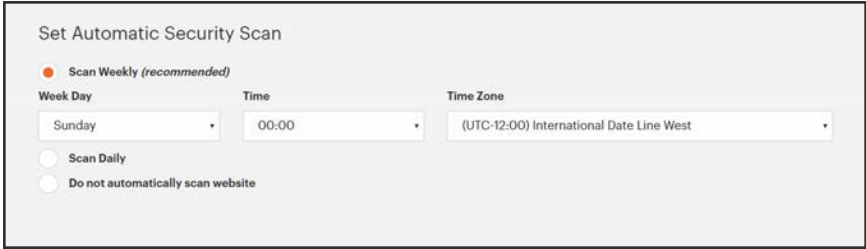
*Scripts and Style Sheets*

- e. When complete, tap **Save Configuration**.
5. Return to the **Security Scan** page in your Magento account. Then, tap **Verify Confirmation Code** to establish your ownership of the domain.
6. After a successful confirmation, **Set Automatic Security Scan** to one of the following:

**Scan Weekly (recommended)**

Choose the **Week Day**, **Time**, and **Time Zone** that the scan is to take place each week.

By default, the scan is scheduled to begin each week at midnight Saturday, UTC, and continue to early Sunday.



*Scan Weekly*

**Scan Daily**

Choose the **Time**, and **Time Zone** that the scan is to take place each day.

By default, the scan is scheduled to begin each day at midnight, UTC.



*Scan Daily*

7. Enter the **Email Address** where you want to receive notifications of completed scans and security updates.

A screenshot of a web form for receiving security updates. It features a bell icon, a text label, a text input field, and a disclaimer.

Receive report notifications and security updates at:

docs1@magento.com

\*this email will only be used for security updates and will **not** be used for sending promotional materials, event information etc.

*Email Address*

8. When complete, tap **Submit**.

After the ownership of the domain is verified, the site appears in the Monitored Websites list of your Magento account.

9. If you have multiple websites with different domains, repeat this process to set up a security scan for each.

# Security Best Practices

All eCommerce sites are attractive targets to hackers because of the personal and payment information that is required to complete a sale. Even if the system does not directly process credit card transactions, a compromised site might reroute customers to a false page, or alter an order before it is transmitted to the payment processor.

A compromised site can have long-term consequences for both customers and merchants. Customers might suffer financial loss and identify theft, while merchants can face damage to their reputations, loss of merchandise, higher processing fees, revoked privileges with financial institutions, and the threat of lawsuits.

This guide outlines a multifaceted approach to improve the security of your Magento installation. Although there is no single way to eliminate all security risks, there are many things that you can do to make your site a less attractive target. It is crucial for hosting providers, system integrators, and merchants to work together to establish and maintain a secure environment, implement methods for early detection, and determine a plan of action in the event of a breach.

## Start Right

Work with reliable hosting providers and solution integrators. When evaluating their qualifications, ask about their approach to security. Verify that they have a secure software development life cycle in accord with industry standards such as The Open Web Application Security Project ([OWASP](#)), and that they test their code for security issues.

If you are starting a new site, consider launching the entire site over HTTPs. Taking the lead on this issue, Google now uses HTTPs as a ranking factor.

For an existing installation, plan to upgrade the entire site to run over to a securely encrypted, HTTPs channel. Although you will need to create redirects from HTTP to HTTPs, the effort will future-proof your site. We recommend that you plan to make this change sooner, rather than later.



## Protect the Environment

Protecting the environment is the most critical aspect of ensuring the security of your store. Keep all software on the server up to date, and apply security patches as recommended. This applies not only to Magento, but to any other software that is installed on the server, including database software and other websites that use the same server. Any system is only as secure as the weakest link.

### Server Environment

- ☒ Make sure that the server operating system is secure. Work with your hosting provider to ensure that there is no unnecessary software running on the server.
- ☒ Use only secure communications protocol (SSH/SFTP/HTTPS) to manage files, and disable FTP.
- ☒ Magento includes `.htaccess` files to protect system files when using the Apache web server. If you use a different web server such as Nginx, make sure that all system files and directories are protected. For an sample Nginx configuration, see: [magento-nginx.conf](#) on GitHub.
- ☒ Use strong and unique passwords, and change them periodically.
- ☒ Keep the system up to date, and immediately install patches when new security issues are discovered.
- ☒ Closely monitor any issues that are reported for software components used by your Magento installation, including the operating system, MySQL database, PHP, Redis (if used), Apache or Nginx, Memcached, Solr, and any other components in your specific configuration.
- ☒ Limit access to `cron.php` file to only required users. For example, restrict access by IP address. If possible, block access completely and execute the command using the system cron scheduler.

### Advanced Techniques

- ☒ Automate the deployment process, if possible, and use private keys for data transfer.
- ☒ Limit access to the Magento Admin by updating the whitelist with the IP address of each computer that is authorized to use the Admin and Magento Connect downloader. For examples of how to whitelist IP addresses, see: [Secure Your Magento Admin](#).
- ☒ Do not install extensions directly on a production server.  
To disable the Magento Connect downloader on the production site, either remove or block access to the `/downloader` directory. You can also use the same [whitelisting](#) methods.

### Advanced Techniques (cont.)

- ☒ Use two-factor authorization for Admin logins. There are several extensions available that provide additional security by requiring an additional passcode that is generated on your phone, or a token from a special device.
- ☒ Review your server for “development leftovers.” Make sure there are no accessible log files, publicly visible .git directories, tunnels to execute SQL, database dumps, phpinfo files, or any other unprotected files that are not required, and that might be used in an attack.
- ☒ Limit outgoing connections to only those that are required, such as for a payment integration.
- ☒ Use a Web Application Firewall to analyze traffic and discover suspicious patterns, such as credit card information being sent to an attacker.

### Server Applications

- ☒ Make sure that all applications running on the server are secure.
- ☒ Avoid running other software on the same server as Magento, especially if it is accessible from the Internet. Vulnerabilities in blog applications such as Wordpress can expose private information from Magento. Install such software on a separate server or virtual machine.
- ☒ Keep all software up to date, and apply patches as recommended.

### Admin Desktop Environment

- ☒ Make sure that the computer that is used to access the Magento Admin is secure.
- ☒ Keep your antivirus software up to date, and use a malware scanner. Do not install any unknown programs, or click suspicious links.
- ☒ Use a strong password to log in to the computer, and change it periodically. Use a password manager such as [LastPass](#), [1Password](#), or [Dashlane](#) to create and manage secure, unique passwords.
- ☒ Do not save FTP passwords in FTP programs, because they are often harvested by malware and used to infect servers. We recommend using SFTP over FTP for file transfers.

## Protect Magento

Your effort to protect your Magento installation starts with the initial setup, and continues with the security-related configuration settings, password management, and ongoing maintenance.

### Your Magento Installation



Use the latest version of Magento to ensure that your installation includes the most recent security enhancements.

If for any reason you cannot upgrade to the latest version, make sure to install all security patches as recommended by Magento. Although Magento issues security patches to fix major issues, new product releases include additional improvements to help secure the site.



Use a unique, [custom Admin URL](#) instead of the default “admin” or the often-used “backend”. Although it will not directly protect your site from a determined attacker, it can reduce exposure to scripts that try to break into every Magento site. (Never leave your valuables in plain sight.)

Check with your hosting provider before implementing a custom Admin URL. Some hosting providers require a standard URL to meet firewall protection rules.



Block access to any development, staging, or testing systems. Use IP [whitelisting](#) and .htaccess password protection. When compromised, such systems can produce a data leak or be used to attack the production system.



Use the correct file permissions. Core Magento and directory files should be set to ready only, including `app/etc/local.xml` files.



Use a strong password for the Magento Admin. To learn more, see: [Creating a strong password](#).



Take advantage of Magento’s security-related configuration settings for [Admin Security](#), [Password Options](#), [Two-Factor Authentication](#) for Admin access, [CAPTCHA](#), and [Google reCAPTCHA](#).



Take advantage of Magento’s free [Magento Security Scan Tool](#)! Monitor your sites for security risks, update malware patches, and detect unauthorized access with this tool.

### Don’t be Taken for a Ride



Install extensions only from trusted sources. Never use paid extensions that are published on Torrent or other sites. If possible, review extensions for security issues before installing them.



Do not click suspicious links, or open suspicious emails.

- ☒ Do not disclose the password to your server or to the Magento Admin, unless you are required to do so.

## Be Prepared!

- ☒ Develop a disaster recovery/business continuity plan. Even a basic plan will help you get back on track in the event of a problem.
- ☒ Ensure that your server and database are automatically backed up to external location. A typical setup requires daily incremental backups, with a full backup on a weekly basis. Make sure to test the backup regularly to verify that it can be restored.
- ☒ For a large site, simple text file dumps of the database take an unacceptable amount of time to restore. Work with your hosting provider to deploy a professional database backup solution.

## Monitor for Signs of Attack

If your system is not immediately patched after a major security breach, there is a high probability that your site is already compromised. Complete a security review periodically to check for signs of attack, and also when contacted by customers with security-related concerns.

### Security Review

- ☒ Check periodically for unauthorized Admin users.
- ☒ Check the **Admin Actions Log** for suspicious activity.
- ☒ Use automated log review tools such as **Apache Scalp**.
- ☒ Work with your hosting provider to review server logs for suspicious activity, and to implement an Intrusion Detection System (IDS) on your network.
- ☒ Use a file and data integrity checking tool such as **TripWire** to receive notification of any potential malware installation.
- ☒ Monitor all system logins (FTP, SSH) for unexpected activity, uploads, or commands.

## Follow Your Disaster Recovery Plan

In the event of a compromise, work with your internal IT security team if available, or hosting provider, and system integrator to determine the scope of the attack. Taking into consideration the type of compromise and the size of the store. Then, adjust the following recommendations to your business needs.

1. Block access to the site, so the attacker cannot remove evidence or steal more information.
2. Backup the current site, which will include evidence of the installed malware or compromised files.
3. Try to determine the scope of the attack. Was credit card information accessed? What information was stolen? How much time has elapsed since the compromise? Was the information encrypted? Typically you can expect the following types of attack:

Defacing of Site	Site access is compromised, but often the payments information is not. User accounts might be compromised.
Botnetting	Your site becomes part of a botnet that sends spam email. Although data is probably not compromised, your server is blacklisted by spam filters which prevents email that you send to customers from being delivered.
Direct Attack on Server	Data is compromised, backdoors and malware are installed, and the site no longer works. Payment information—provided that it is not stored on the server— is probably safe.
Silent Card Capture	In this most disastrous attack, intruders install hidden malware or card capture software, or possibly modify the checkout process to collect and send out credit card data. Such attacks can go unnoticed for extended periods of time, and result in major compromise of customer accounts and financial information.

4. Try to find the attack vector to determine how the site was compromised, and when. Review server log files and file changes. Note that sometimes there are multiple different attacks on the same system.
5. If possible, wipe and reinstall everything. In case of virtual hosting, create a new instance. Malware might be hidden in an unsuspected location, just waiting to restore itself. Remove all unnecessary files. Then, reinstall all required files from a known, clean source such as files from your own version control system, or the original distribution files from magento.com.
6. Apply all the latest security patches necessary.
7. Reset all credentials, including the database, file access, payment and shipping integrations, web services, and Admin login.
8. If payment information was compromised, it might be necessary to inform your payment processor.

9. Inform your customers about the attack and the type of information affected. If payment information was compromised, they should look for unauthorized transactions. If personal information, including email addresses was compromised, they might be targeted with phishing attacks or spam.

## Additional Resources

For additional technical best practices and developer-centric information, see the following information.

- The [Magento Security blog](#) investigates and provides insights to security issues, best practices, and solutions for all of your security questions.
- Try out the free [Magento Security Scan Tool](#)! Monitor your sites for security risks, update malware patches, and detect unauthorized access with this tool from Magento Commerce.
- Check all available [Developer Tools](#) through the Admin. These features can help test, verify, and prepare your site and Admin for workloads and traffic.
- The Magento Community has limitless best practices, recommendations, and tutorials to help get you started with Magento, maintaining your catalogs, and much more. Check out the best [Community Resources](#).

## Acknowledgments

Parts of this article were inspired by real-world solutions that were shared by community members. The resulting article incorporates content from the community, with input from our team.

- Bryan (BJ) Hoffpauir for sharing his insight on the Magento forum, and for contributing recommendations in the Attack Response Plan section of this article. See the [original post](#) by [beejhuff](#) for more information.
- Anna Völkl ([@rescueann](#)), Magento developer at LimeSoda.
- Robert Mangiafico ([@robfico](#)) CTO at LexiConn.
- Dracony ([@dracony\\_gimp](#)) for his security presentation, [Being Hacked is Not Fun](#).
- Willem de Groot for providing a sample [Nginx configuration](#).

## Security Action Plan

If you suspect that your site is compromised, follow this action plan without delay.



**DIAGNOSE.** Run a scan to establish the security status of your Magento store. [MageReport.com](#) is a highly regarded service that is available at no charge to members of the Magento community.



**CLEAN.** Hire a [qualified consultant](#) or online service to clean your site of all malicious code. Some Magento community members recommend [Sucuri Website Malware Removal](#).

- Check the /media folder for leftover executable code.
- Remove all unknown Admin users and reset all Admin passwords.



**PROTECT.** Keep your Magento installation up-to-date with the most current release. If using an older version, apply all security patches as they become available.

- Review and follow [Magento Security Best Practices](#).
- Subscribe to [Magento Security Alerts](#).



**REPORT.** If you think that you have found a specific vulnerability in Magento, send a description of the problem with technical details to [security@magento.com](mailto:security@magento.com).



**UPGRADE.** For additional peace of mind that comes from 24/7 support, plan your upgrade now to [Magento Enterprise Cloud Edition](#).

## Configuring Admin Security

Magento recommends that you take a multifaceted approach to protect the security of your store. You can begin by using a **custom Admin URL** that is not easy to ascertain, rather than the obvious “Admin” or “Backend.” As a **best practice**, use only strong Admin passwords that include a combination of letters, numbers, and symbols. For increased security, consider implementing two-factor authentication that generates a token on a separate device. To learn more, see the selection of security-related extensions on **Magento Marketplace**.

The Admin security configuration gives you the ability to add a secret key to URLs, require passwords to be case sensitive, and to limit the length of Admin sessions, the lifetime of passwords, and the number of login attempts that can be made before the Admin user account is **locked**. For increased security, you can configure the length of keyboard inactivity before the current session expires, and require the user name and password to be case-sensitive. For additional security, the Admin login can be configured to require a **CAPTCHA**.

Security

Admin Account Sharing

No

☒ Use system value

If set to Yes, you can log in from multiple computers into same account. Default setting No improves security.

Password Reset Protection Type

By IP and Email

☒ Use system value

Recovery Link Expiration Period (hours)

2

☒ Use system value

Please enter a number 1 or greater in this field.

Max Number of Password Reset Requests

5

☒ Use system value

Limit the number of password reset request per hour. Use 0 to disable.

Min Time Between Password Reset Requests

10

☒ Use system value

Delay in minutes between password reset requests. Use 0 to disable.

Add Secret Key to URLs

No

☐ Use system value

Login is Case Sensitive

No

Admin Session Lifetime (seconds)

900

☒ Use system value

Please enter at least 60 and at most 31536000 (one year).

Maximum Login Failures to Lockout Account

6

☒ Use system value

We will disable this feature if the value is empty.

Lockout Time (minutes)

30

☒ Use system value

Password Lifetime (days)

90

☒ Use system value

We will disable this feature if the value is empty.

Password Change

Forced

☒ Use system value

*Security*



### To configure Admin security:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **Admin**.
3. Expand ☺ the **Security** section. Then, do the following:
  - a. To prevent Admin users from logging in from the same account on different devices, set **Admin Account Sharing** to "No."
  - b. To determine the method that is used to manage password reset requests, set **Password Reset Protection Type** to one of the following:
 

By IP and Email	The password can be reset online after a response is received from the notification is sent to the email address associated with the Admin account.
By IP	The password can be reset online without additional confirmation.
By Email	The password can be reset only by responding by email to the notification that is sent to the email address associated with the Admin account.
None	The password can be reset only by the store administrator.
  - c. In the **Recovery Link Expiration Period (hours)** field, enter the number of hours a password recovery link remains valid.
  - d. To determine the maximum number of password requests that can be submitted per hour, enter the **Max Number of Password Reset Requests**.
  - e. In the **Min Time Between Password Reset Requests** field, enter the minimum number of minutes that must pass between password reset requests.
  - f. To append a secret key to the Admin URL as a precaution against exploits, set **Add Secret Key to URLs** to "Yes." This setting is enabled by default.
  - g. To require that the use of upper- and lowercase characters in any login credentials entered match what is stored in the system, set **Login is Case Sensitive** to "Yes."
  - h. To determine the length of an Admin session before it times out, enter the duration of the session in seconds, in the **Admin Session Lifetime (seconds)** field. The value must be 60 seconds or greater.
  - i. In the **Maximum Login Failures to Lockout Account** field, enter the number of times a user can try to log in to the Admin before the account is locked. By default, six attempts are allowed . Leave the field empty for unlimited login attempts.
  - j. In the **Lockout Time (minutes)** field, enter the number of minutes that an Admin account is locked when the maximum number of attempts is met.

- k.** To limit the lifetime of Admin passwords, enter the number of days a password is valid in the **Password Lifetime (days)** field. /For an unlimited lifetime, leave the field blank.
  - l.** Set **Password Change** to one of the following:

Forced	Requires that Admin users change their passwords after the account is set up.
Recommended	Recommends that Admin users change their passwords after account is set up.
- 4.** When complete, tap **Save Config**.

## CAPTCHA


A CAPTCHA is a visual device that ensures that a human being, rather than a computer, is interacting with the site. CAPTCHA is an acronym for “Completely Automated Public Turing test to tell Computers and Humans Apart,” and can be used for both Admin and customer account logins.

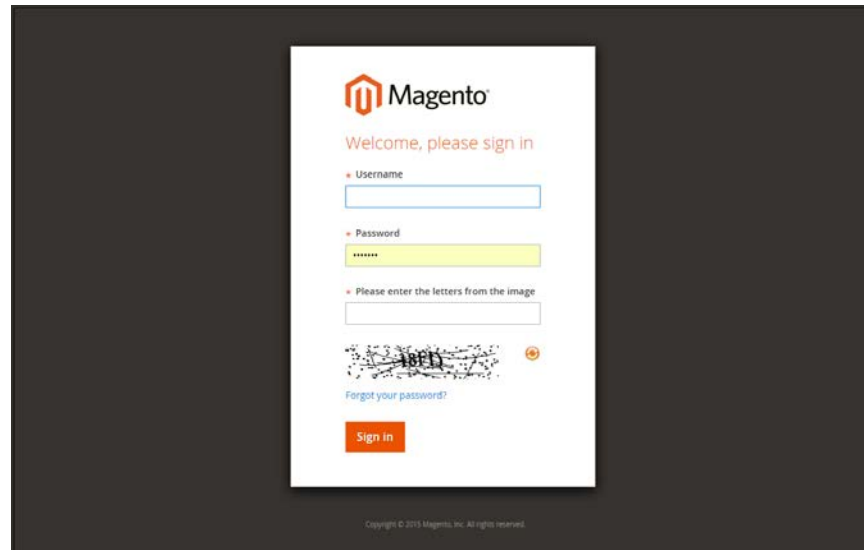
You can reload the CAPTCHA as many times as is necessary by clicking the Reload icon in the upper-right corner of the image. The CAPTCHA is fully configurable and can be set appear every time, or only after a number of failed login attempts.

 The screenshot shows the 'Customer Login' page for a store named 'LUMA'. The page has a header with navigation links like 'What's New', 'Women', 'Men', 'Gear', 'Training', 'Sale', and 'Membership'. Below the header, there are two main sections: 'Registered Customers' and 'New Customers'. The 'Registered Customers' section contains fields for 'Email' and 'Password', both marked as required. Below these fields is a CAPTCHA image showing the letters 'KAK' in a stylized font. A 'Reload captcha' button is located to the right of the CAPTCHA image. At the bottom of the 'Registered Customers' section, there is a 'Login' button and a link for 'Forgot Your Password?'. The 'New Customers' section contains a 'Register' button. A search bar is located at the top right of the page, and a shopping cart icon is also visible.

*Customer Login with CAPTCHA*

## Admin CAPTCHA

For an extra level of security, you can add a CAPTCHA to the Admin Sign In and Forgot Password page. Administrator users can reload the displayed CAPTCHA by clicking the Reload  icon in the upper-right corner of the image. The number of reloads is unlimited.



*Admin Sign In with CAPTCHA*

### To configure an Admin CAPTCHA:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Advanced**, choose **Admin**.
3. In the upper-right corner, set **Store View** to "Default."
4. Expand ☑ the **CAPTCHA** section, and do the following:

**CAPTCHA**

Enable CAPTCHA in Admin [global] Yes ☐ Use system value

Font [global] LinLibertine ☒ Use system value

Forms [global] Admin Login ☒ Use system value  
Admin Forgot Password

Displaying Mode [global] After number of attempts to login ☒ Use system value

Number of Unsuccessful Attempts to Login [global] 3 ☒ Use system value  
If 0 is specified, CAPTCHA on the Login form will be always available.

CAPTCHA Timeout (minutes) [global] 7 ☒ Use system value

Number of Symbols [global] 4-5 ☒ Use system value  
Please specify 8 symbols at the most. Range allowed (e.g. 3-5)

Symbols Used in CAPTCHA [global] ABCDEFGHJKLMnpqrstuvwxyz23456789 ☒ Use system value  
Please use only letters (a-z or A-Z) or numbers (0-9) in this field. No spaces or other characters are allowed. Similar looking characters (e.g. "l", "1", "1") decrease chance of correct recognition by customer.

Case Sensitive [global] No ☒ Use system value

### Admin CAPTCHA Configuration

- a. Set **Enable CAPTCHA in Admin** to “Yes.”
- b. Enter the name of the Font to be used for the CAPTCHA symbols. Default font: LinLibertine

To add your own font, the font file must reside in the same directory as your Magento instance, and be declared in the config.xml file of the Captcha module at: `app/code/Magento/Captcha/etc`

- c. Select the **Forms** where the CAPTCHA is to be used:
  - Admin Login
  - Admin Forgot Password
- d. Set **Displaying Mode** to one of the following:

Always

CAPTCHA is always required to log in the Admin.

After number of attempts to login

When selected displays the Number of Unsuccessful Attempts to Login field. Enter the number of login attempts allowed. A value of 0 (zero) is similar to setting Displaying Mode to Always. This option does not cover the Forgot Password form. If CAPTCHA is enabled and set to be appear on this form, then it is always included on the form.

- e. Enter the **Number of Unsuccessful Attempts to Login** before the CAPTCHA appears. If set to zero, the CAPTCHA is always used.
  - f. In the **CAPTCHA Timeout (minutes)** field, enter the number of minutes before the CAPTCHA expires. When the CAPTCHA expires, the user must reload the page.
  - g. Enter the **Number of Symbols** used in the CAPTCHA, up to eight. For a variable number of symbols that changes with each CAPTCHA, enter a range, such as 5-8.
  - h. In the **Symbols Used in CAPTCHA** field, specify the symbols that can be used in the CAPTCHA. Only letters (a-z and A-Z) and numbers (0-9) are allowed. The default set of characters does not include similar symbols such as I or 1. For best results, use symbols that users can readily identify.
  - i. To require that users enter the characters exactly as shown set **Case Sensitive** to “Yes.”
5. When complete, tap **Save Config...**

## Customer CAPTCHA

Customers can be required to enter a CAPTCHA each time they log in to their accounts, or after several unsuccessful attempts to log in. CAPTCHA can be used for the following forms in the storefront:

- Create User
- Login
- Forgot Password
- Checkout as Guest
- Register During Checkout
- Contact Us
- Payflow Pro (Requires installing a patch according to KB [PayPal Payflow Pro active carding activity.](#))

CAPTCHA

Enable CAPTCHA on Storefront

[website]

Yes

▲

☐ Use system value

Font

[website]

LinLibertine

▼

☒ Use system value

Forms

[website]

Create user

Login

Forgot password

Check Out as Guest

Register during Checkout

Contact Us

Change password

☒ Use system value

CAPTCHA for "Create user" and "Forgot password" forms is always enabled if chosen.

Displaying Mode

[website]

After number of attempts to login

▼

☒ Use system value

Number of Unsuccessful Attempts to Login

[website]

3

☒ Use system value

If 0 is specified, CAPTCHA on the Login form will be always available.

CAPTCHA Timeout (minutes)

[website]

7

☒ Use system value

Number of Symbols

[website]

4-5

☒ Use system value

Please specify 8 symbols at the most. Range allowed (e.g. 3-5)

Symbols Used in CAPTCHA

[website]

ABCDEFGHIJKLMNOPQRSTUVWXYZ23456789

☒ Use system value

Please use only letters (a-z or A-Z) or numbers (0-9) in this field. No spaces or other characters are allowed. Similar looking characters (e.g. "l", "1", "1") decrease chance of correct recognition by customer.

Case Sensitive

[website]


No

▼

☒ Use system value

*Customer CAPTCHA Configuration*

## To configure a Storefront CAPTCHA:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Customers**, choose **Customer Configuration**.
3. Expand  the **CAPTCHA** section, and do the following:

a. Set **Enable CAPTCHA on Frontend** to “Yes.”

b. Enter the name of the Font to be used for the CAPTCHA symbols.

To add your own font, the font file must reside in the same directory as your Magento instance, and be declared in the `config.xml` file of the CAPTCHA module.

c. Choose one of the following **Forms** where CAPTCHA is to be used.

- Create User
- Login
- Forgot Password
- Checkout as Guest
- Register during Checkout
- Payflow Pro (Requires installing a patch according to KB [PayPal Payflow Pro active carding activity](#).)

d. Set **Displaying Mode** to one of the following:

Always      CAPTCHA is always required to access the selected form(s).

After number of attempts to login      Enter the number of login attempts before the CAPTCHA appears. A value of 0 (zero) is similar to “Always.” When selected, the number of unsuccessful login attempts appears.

This option does not apply to the Forgot Password form, which always display the CAPTCHA, if enabled,

e. Enter the **Number of Unsuccessful Attempts to Login** before the CAPTCHA appears. If set to zero, the CAPTCHA is always used.

f. In the **CAPTCHA Timeout (minutes)** field, enter the number of minutes before the CAPTCHA expires. When the CAPTCHA expires, the user must reload the page to generate a new CAPTCHA.

g. Enter the **Number of Symbols** in the CAPTCHA, up to eight. For a variable number of symbols that change with each CAPTCHA, enter a range such as 5-8.

h. In the **Symbols Used in CAPTCHA** field, specify the symbols that can be used in the CAPTCHA. Only letters (a-z and A-Z) and numbers (0-9) are allowed. The default set of characters does not include similar symbols such as I or 1. For best results, use symbols that users can readily identify.



- i. To require that the user enter the upper-and lowercase characters exactly as shown set **Case Sensitive** to “Yes.”
4. When complete, tap **Save Config**.

## Google reCAPTCHA

The **Google reCAPTCHA** extension ensures that a human being, rather than a computer, is interacting with the site. It provides enhanced security over Magento CAPTCHA, performs checks without potential user error when entering a series of letters and numbers, and encourages cart conversion without additional hurdles to complete a purchase.

The screenshot shows the 'Customer Login' page for a store named 'LUMA'. The page has a header with navigation links: 'What's New', 'Women', 'Men', 'Gear', 'Training', 'Sale', and 'Membership'. Below the header, there's a search bar and a shopping cart icon. The main content area is divided into two sections: 'Registered Customers' and 'New Customers'. The 'Registered Customers' section has a form with fields for 'Email' and 'Password', a reCAPTCHA v2 widget, and a 'Login' button. The 'New Customers' section has a 'Register' button. A 'Forgot Your Password?' link is also present. The reCAPTCHA v2 widget includes a checkbox labeled 'I'm not a robot' and a small image of the reCAPTCHA logo.

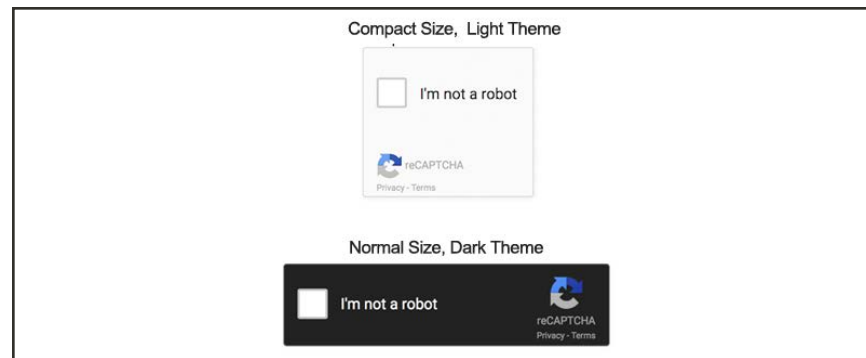
*Customer Login with reCAPTCHA v2*

**Google reCAPTCHA** verifies users with increased security and reduced clicks for each of completion, and can be implemented in two ways:

- reCAPTCHA v2 verifies users and customers using an on-click feature proving "I am not a robot."
- Invisible reCAPTCHA (**recommended**) performs background verification without user interaction. Users and customers are automatically verified without clicking anything.

You can use Google reCAPTCHA on the **Admin Sign In** page, and on various customer pages in the storefront. The styling options include your choice of a light or dark theme, and either a compact or normal size.

If you have the standard **Magento CAPTCHA** enabled, reCAPTCHA will override it. You can have both enabled on your Magento instance without issues.

*Google reCAPTCHA Styles*

## Step 1: Install Google reCAPTCHA

Google reCAPTCHA is installed with Magento Open Source and Commerce v2.1.18. Continue to Step 2.

For Magento Open Source and Commerce v 2.1.17 and earlier, follow the instructions in [Magento DevDocs](#) to install and troubleshoot the extension. At this time, Google reCAPTCHA must be installed from the command line and may require developer assistance.

To add the PayPal PayFlow Pro checkout option, see the Magento KB [PayPal Payflow Pro active carding activity](#).

## Step 2: Generate Google reCAPTCHA keys

Google reCAPTCHA requires a pair of API keys to enable. You can get these keys free of charge through the [reCAPTCHA site](#). Before generating the keys, consider the type of reCAPTCHA you want to use.

1. Visit the [Google reCAPTCHA page](#), and log in to your account. Then, do the following:
  - a. Enter a **Label** for the keys. For example, enter Magento. You only need one set of keys for your entire Magento instance.
  - b. Choose the type of reCAPTCHA that you want to use:  
  
reCAPTCHA V2      Verifies with a button click.  
  
Invisible reCaptcha      Verifies in the background without interaction.
  - c. In the **Domains** text box, enter a list of domains without the HTTP or HTTPS prefix, one per line. Google verifies the addresses entered.
    - Add your Magento instance domain and any subdomains.
    - You can add localhost, other local VM domains, and staging domains as needed for testing.
  - d. Mark the checkbox to **Accept the reCAPTCHA Terms of Service**.

- e. (Optional) Mark the **Send alerts to owners** checkbox to send notification if Google detects issues or suspicious traffic.

*Google reCAPTCHA Site Registration*

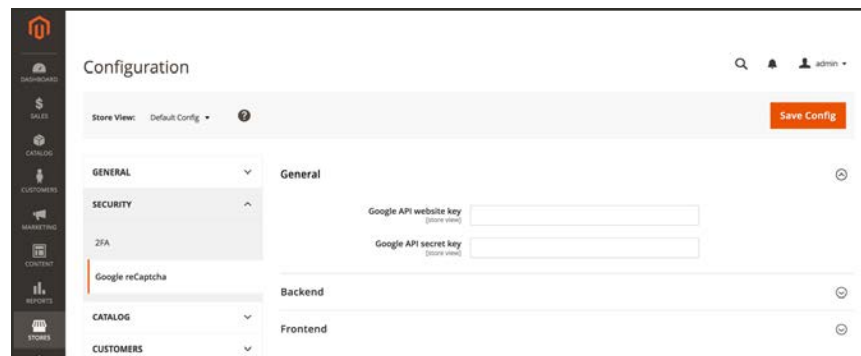
2. Tap **Register**, and do the following:
  - a. When the domain(s) you added appear at the top of the page, choose the Magento domain to get your keys.
  - b. Scroll down to the **Adding reCAPTCHA to your site** section and expand **Keys**. You will need these keys when enabling Google reCAPTCHA.

*Site Key and Secret Key*


### Step 3: Configure Google reCAPTCHA in Magento

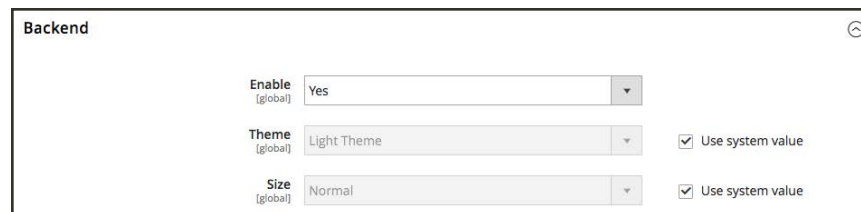
1. Sign in to the Admin of your Magento store. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the upper-right corner, set **Store View** to “Default Config.”
3. In the panel on the left under **Security**, choose **Google reCAPTCHA**. Then, expand the **General** section, and enter the following generated keys:

- Google API website key
- Google API secret key




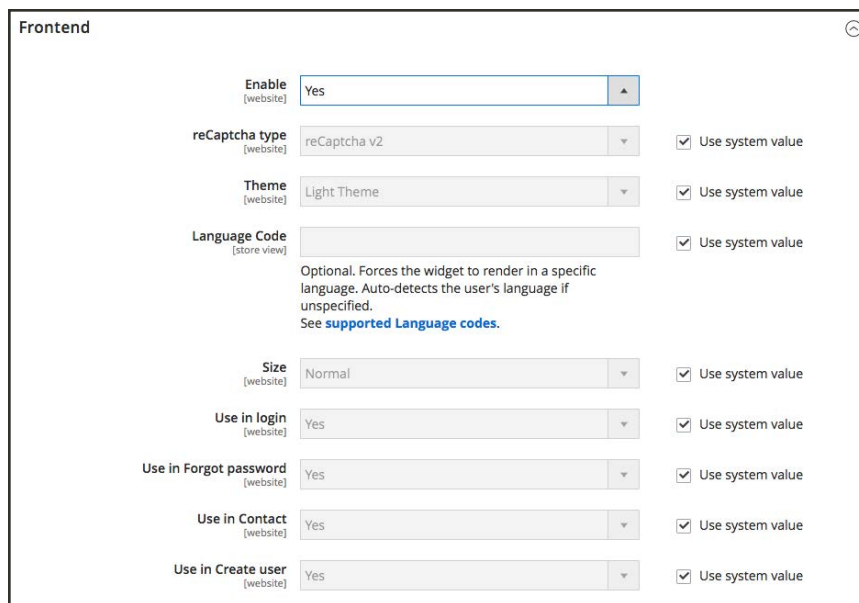
*Google reCAPTCHA keys*

4. Expand (  ) the **Backend** section, and do the following:
- Set **Enable** to “Yes.”
  - To change the **Theme**, clear the **Use system value** checkbox. Then, choose one of the following:
    - Light
    - Dark
  - To change the **Size**, clear the **Use system value** checkbox. Then, choose one of the following:
    - Normal
    - Compact



*Google reCAPTCHA Backend*

5. Expand (  ) the **Frontend** section. Then, do the following to add reCAPTCHA to customer accounts:



**Frontend**

**Enable** [website] Yes

**reCaptcha type** [website] reCaptcha v2 ☒ Use system value

**Theme** [website] Light Theme ☒ Use system value

**Language Code** [store view]  ☒ Use system value  
Optional. Forces the widget to render in a specific language. Auto-detects the user's language if unspecified. See [supported Language codes](#).

**Size** [website] Normal ☒ Use system value

**Use in login** [website] Yes ☒ Use system value

**Use in Forgot password** [website] Yes ☒ Use system value

**Use in Contact** [website] Yes ☒ Use system value

**Use in Create user** [website] Yes ☒ Use system value

### Google reCAPTCHA Frontend

- a. Set **Enable** to “Yes”.
  - b. Choose the **reCAPTCHA type** you want used in Admin forms. You must have added the correct API keys for the type.
    - reCAPTCHA v2 validates with the “I’m not a robot” checkbox.
    - Invisible reCAPTCHA (**recommended**) validates in the background without requiring user interactions.
  - c. To change the **Theme**, uncheck **Use system value** checkbox and select a Light or Dark Theme from the drop-down menu.
  - d. To change the **Size**, uncheck **Use system value** checkbox and select a theme from the drop-down menu: Normal or Compact.
  - e. Select when to use reCAPTCHA for customer accounts. By default, reCAPTCHA is enabled for these pages.
    - Use in login
    - Use in Forgot password
    - Use in Contact
    - Use in Create user
    - Use in PayPal PayflowPro payment form (Requires installing a patch according to KB [PayPal Payflow Pro active carding activity](#).)
6. When complete, tap **Save Config**.

## Two-Factor Authentication

The Magento Admin provides all access to your store, orders, and customer data. To further increase security to your Magento instance, **Magento Two-Factor Authentication** (2FA) adds support for two-step authentication for multiple providers. When enabled, users attempting to access the Admin must complete a second step to verify their account. All features and requirements are restricted to Admin user accounts, not extended to customer accounts.

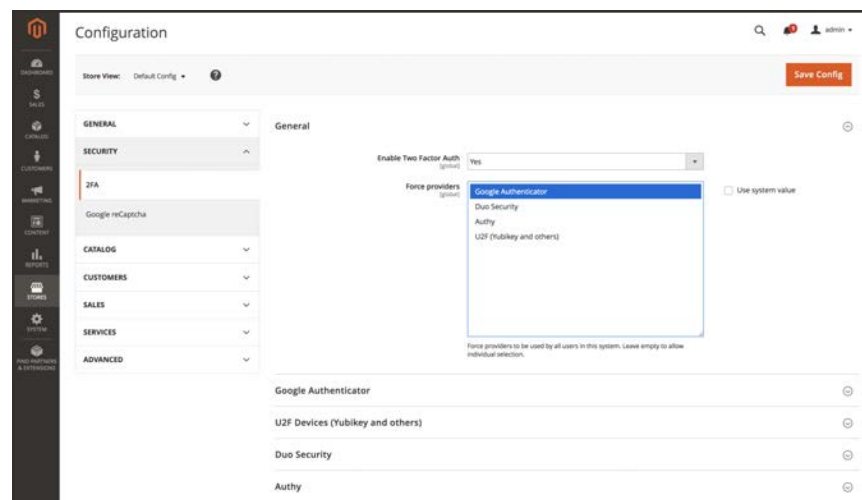
### Step 1: Install Two-Factor Authentication

To install the Two-Factor Authentication extension, you may require developer assistance. Follow the instructions in [Magento DevDocs](#) to install and troubleshoot the extension.

At this time, Two-Factor Authentication can be installed only from the command line.

### Step 2: Enable 2FA and Supported Providers

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Security**, choose **2FA**.



*Enable 2FA for the Admin*

3. Expand (⌵) the **General** section, if necessary. Then, set **Enable Two Factor Auth** to “Yes.”
4. Enable and configure each authentication provider that you support: Each enabled authenticator becomes a supported option for user accounts.

### Google Authenticator

1. Set **Enable this provider** to “Yes.”
2. (Optional) Set **Enable “trust this device” option** to one of the following:

- Yes      The user does not have to enter their authenticator code for every login per device.
- No       Forces authentication for every login.

Google Authenticator

Enable this provider [global] Yes

Enable "trust this device" option [global] Yes ☒ Use system value

NOTE: This option should be used in HTTPS only environments

### *Google Authenticator*

## **U2F Devices** (Yukikey and others)

1. Set **Enable this provider** to "Yes."
2. (Optional) Set **Enable "trust this device" option** to one of the following:

- Yes      The user does not have to enter their authenticator code for every login per device.
- No       Forces authentication for every login.

U2F Devices (Yubikey and others)

Enable this provider [global] Yes

Requires HTTPS to work

Enable "trust this device" option [global] Yes ☒ Use system value

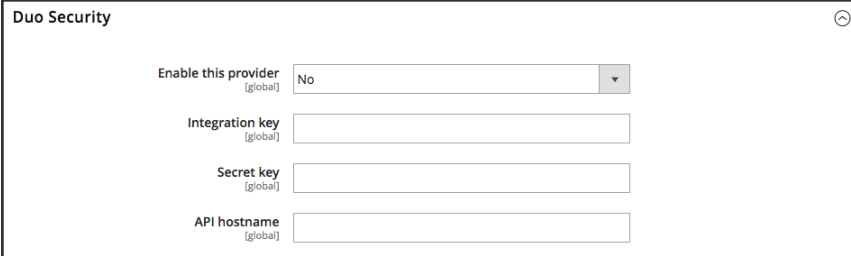
### *U2F Devices*

## **Duo Security**

1. Set **Enable this provider** to "Yes."
2. (Optional) Set **Enable "trust this device" option** to one of the following:

- Yes      The user does not have to enter their authenticator code for every login per device.
- No       Forces authentication for every login.

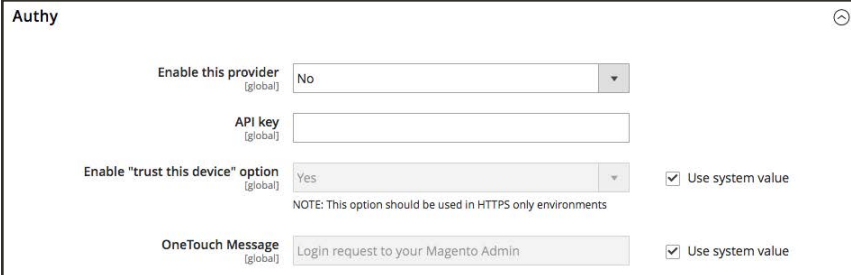
3. Enter the following keys for your account:
  - Integration key
  - Secret key
4. Enter the **API hostname**.



### *Duo Security*

## Authy

1. Set **Enable this provider** to “Yes.”
2. Enter the **API key** for your Authy account.
3. (Optional) Set **Enable “trust this device” option** to one of the following:
  - Yes      The user does not have to enter their authenticator code for every login per device.
  - No      Forces authentication for every login.
4. (Optional) To change the **OneTouch Message**, clear the **Use system value** checkbox. Then, enter the message that you want to use.



### *Authy*

5. When complete, tap **Save Config**.

## Step 3: Configure Required Authenticator Provider

You must choose at least one authenticator supported per user account, or force an authenticator globally for all accounts. We recommend setting or forcing only one authenticator for the Magento Admin. If you select multiple authenticators, the user must input tokens for all selections.



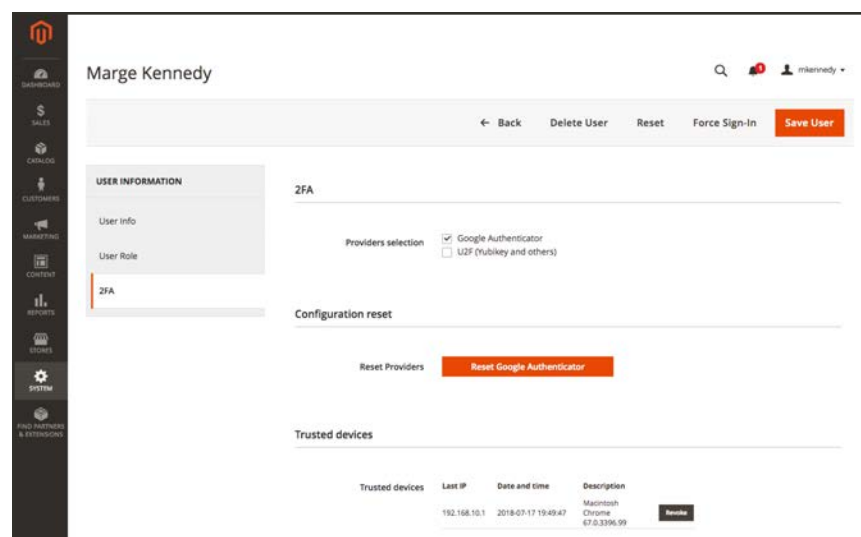
Set required authenticators per user account	Supports multiple types of authenticators and allows you to set an authenticator per account depending on user or office needs.
Force global authenticator for all accounts	Strictly requires all Magento Admin users to access using the selected authenticator(s).

### Set required authenticators per user account:

With one or more authenticators enabled for the Magento Admin, you can require one or more authenticators per Admin user account. For this option, keep **Use system value** checked for **Force providers** and enable/configure supported authenticator providers.

We recommend only enabling one authenticator per account. If you require multiple authenticators, the user must authenticate with each one. For example, if you select Google and U2F, the user must access with a Google Authenticator code and connect a U2F device.

1. On the Admin sidebar, tap **System**. Then under **Settings**, choose **All Users**.
2. Do one of the following:
  - Select and edit a user from the list.
  - Add a new user account.
3. In the sidebar under **2FA** section,
4. Mark the checkbox of the authenticator that you want to require for the user account. The list includes all enabled and configured authenticator providers.
5. When complete, tap **Save User**.



*Enable 2FA for User*

### Force global authenticator for all accounts:

This option requires all Admin users to configure and use all forced authenticators to access the Magento Admin. We recommend that you assign one authenticator to be forced.

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Security**, choose **2FA**. Then, do the following:
  - a. In the **General** section, clear the **Use system value** checkbox for Force providers.
  - b. Select one or more authenticators.
3. When complete, tap **Save Config**.

*Force providers for all user accounts*

## Using Two-Factor-Authentication

Follow the instructions for the method of authentication that you want to use.

### U2F Key

With the U2F device configured, the user attaches the device to their system when logging into the Admin. For more information, check your U2F vendor documentation, such as **YubiKey** by Yubico.

1. Enter Magento Admin account credentials and sign in to your account.



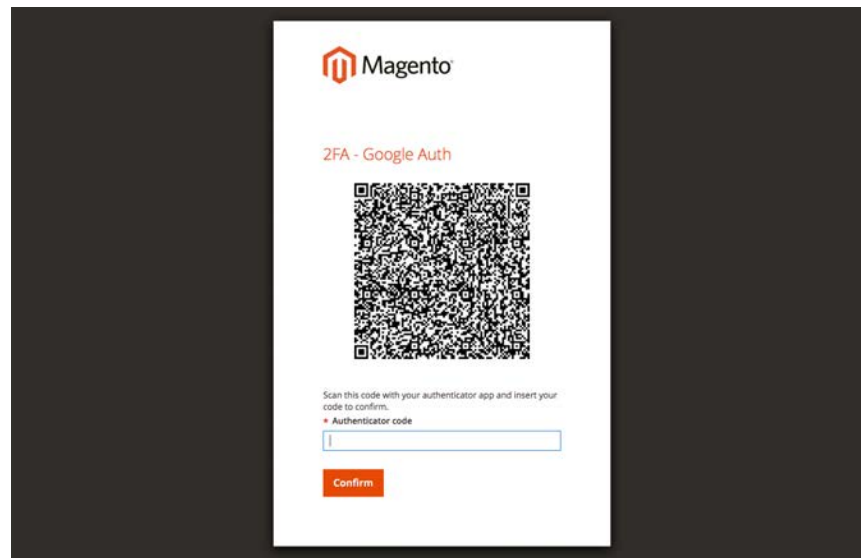
*U2F Key Access*

2. Press the button on the key. Authentication immediately triggers and opens the Admin.
3. Insert the **U2F key** into a USB port on your computer.

## Google Authenticator

### Step 1: Configure Google Authenticator

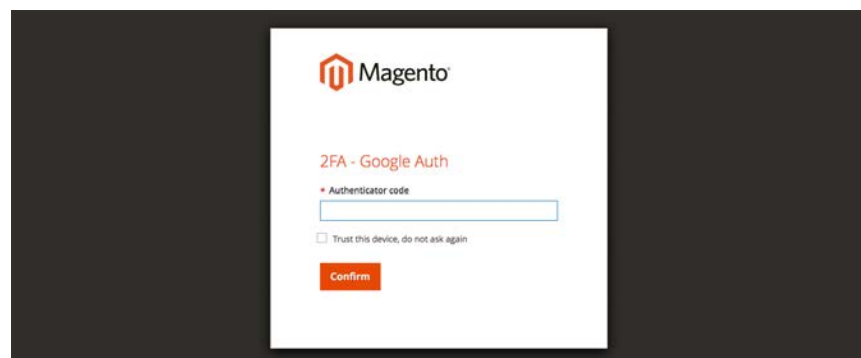
1. Enter Magento Admin account credentials and log in.  
A new authenticator screen appears with a QR code.
2. Open the **Google Authenticator** app on your mobile device.
3. Tap the plus sign ( + ) to add a new entry. Then, do the following:
  - a. Line up the red box with the QR code to scan with the camera on the mobile device.
  - b. When it recognizes the QR code and adds an entry, enter that 6-digit code in the Admin **Authenticator code** field.
4. When complete, tap **Confirm**.



*Google Authenticator QR code*

## Step 2: Sign In with Google Authenticator

1. Enter your Magento Admin account credentials and sign in.



*Google Authenticator QR code*

2. Open **Google Authenticator** on your mobile device.
3. When prompted, enter the 6-digit Authentication code.
4. To save the authentication for future logins, mark the **Trust this device, do not ask again** checkbox.
5. When complete, tap **Confirm**.

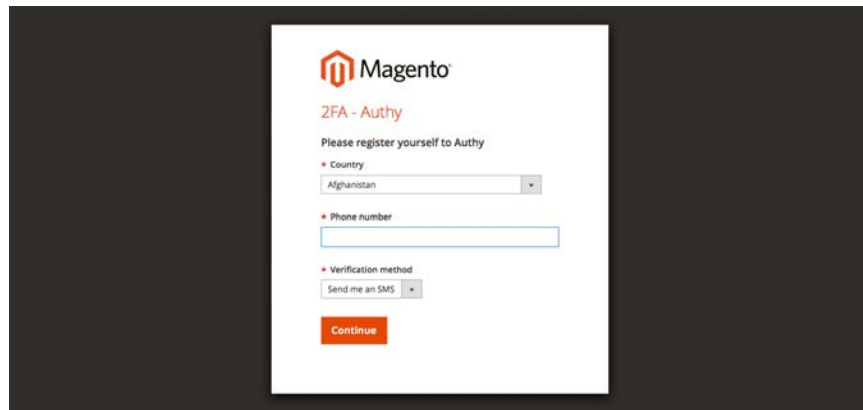
## Authy

The Authy authenticator includes multiple types of apps available from this page, including:

Mobile App, Desktop App, and Chrome App. For details on setup, see [Authy documentation](#).

### Step 1: **Configure Authy**

1. Enter Your Magento Admin account credentials and sign in.



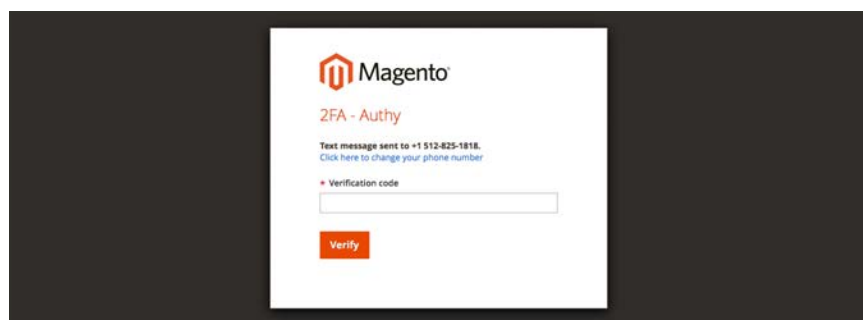
*Authy registration*

2. When prompted to register yourself with Authy, do the following:

- a. Select your **Country**.
- b. Enter your **Phone number**.
- c. Select one of the following **Verification methods**:
  - SMS
  - Call Me
- d. Tap **Continue**.

A message is sent to your phone through SMS text or a call.

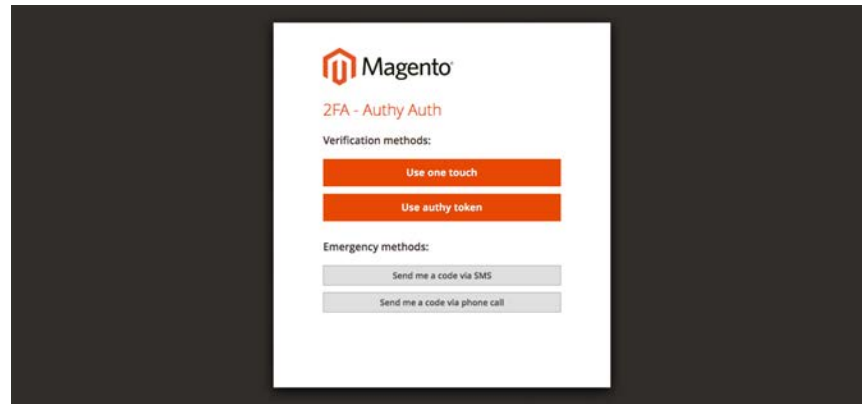
3. Enter the **Verification code** that you receive, and tap **Verify**. Then when prompted, tap **Confirm**.



*Authy verification code*

## Step 2: Sign In with Authy

1. Enter Magento Admin account credentials and sign in.



*Authy access*

2. Choose one of the following methods to authenticate:

Use one touch                      Sends an alert to your Authy app. In the app, accept the access.

Use authy token                      Prompts to enter a code from your Authy app.

3. The app includes additional emergency methods if you have trouble signing in. Choose the method you want to use to receive the code. Then, enter the code that you receive to access the Admin.

Send me a code via SMS                      A text SMS message is sent to the configured mobile device.

Send me a code via phone call                      The user receives a phone call with a code.

Your account is verified and opens.

## Duo

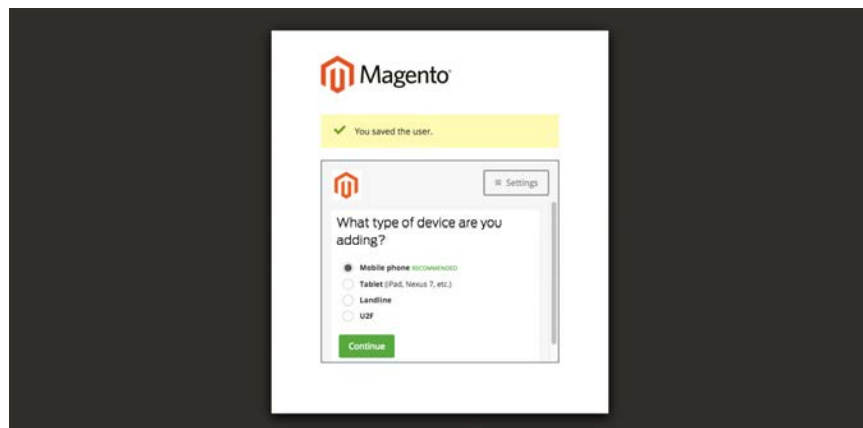
The Duo Mobile app is available through [Google Play](#) or [iOS App Store](#). To use, it must be activated and linked to an account. For details, your security staff should obtain a Duo account and complete setup.

## Step 1: Configure Duo

1. Enter Magento Admin account credentials and sign in to your account.
2. When the Duo Setup page appears, tap **Start setup**. Then, do the following:

*Duo Setup*

- a. Select your device.

*Device Type*

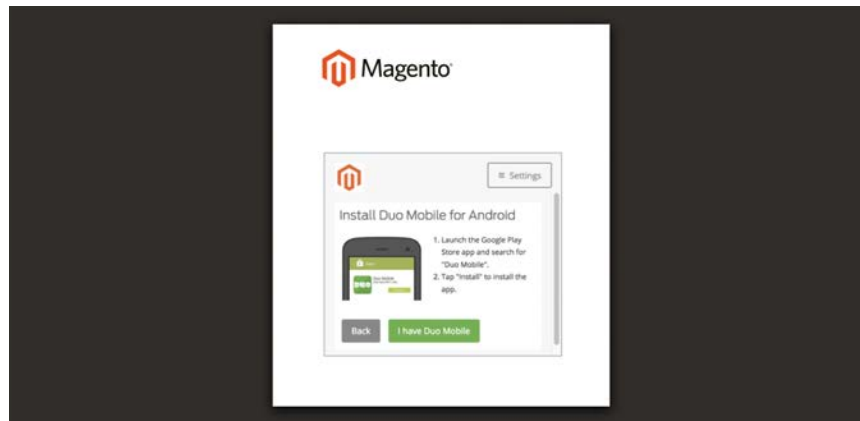
- b. When prompted, enter your **phone number**, and tap **Continue**..

This example requests your phone number, because we're using a mobile device.



*Enter Your Phone Number*

- c. When prompted to install Duo Mobile for your phone type, tap **I have Duo Mobile**.



*Verify Installation*

3. Open Duo Mobile, and scan the **QR code** to sync the authenticator with Magento. A checkmark appears when the activation is complete.

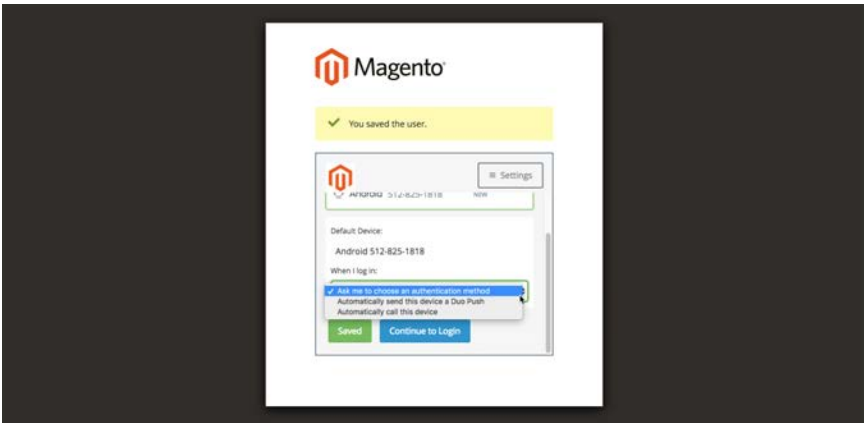




Activate Duo

4. To configure your settings for the device, choose the action that you want to take place when you sign in.

Ask me to choose an authenticator method	Allows the user to select when logging in and authenticating in the Magento Admin.
Automatically send this device a Duo Push	Sends a message to your device to accept or deny for access.
Automatically call this device	Calls and provides a passcode for entering



Duo Login Action

Step 2: **Sign In with Duo**

The following example displays the options when selecting Ask me to choose an authenticator method:

1. When prompted, enter Enter Magento Admin credentials to log in.



*Duo Enrollment Success*

2. Choose the method that you want to use to authenticate:

Send Me a Push	Tap to receive a push notice to Duo Mobile. Accept to authenticate.
Call Me	Tap this option, receive a call with a code, and enter the passcode.
Enter a Passcode	Tap this option to receive and enter a passcode.

3. Complete the push or code to fully sign in to the Admin.

## Managing Two-Factor Authentication

If a user has issues accessing the Magento Admin with their authenticator, they can attempt to sync or troubleshoot their authenticator. You can also reset the authenticator associated with the account. When reset, the user must reconnect and add the authenticator again when they next access the Admin.

If you have issues accessing the Magento Admin with the authenticators, consider the following:

- Some mobile apps include options to sync. This option reconnects the app and server, updating in case time settings changed on the device or server.
- Revoking a device or resetting an authenticator can help users connect.
- Clearing web cache and cookies for the Magento instance can also help. Authenticators, like Google, use generated cookies to save access and duration. Clear your cookies for your specific browser and Magento instance domain.
- If you have blocked cookies for your browser, this will block some authenticators, like Google, from completing verification and access. Add a rule to allow cookies for your Magento instance.

### To reset authenticators per account:

Resetting an authenticator also revokes all trusted devices tracked by the Admin.

1. On the Admin sidebar, tap **System**. Then under Permissions, choose **All Users**.
2. Select and edit a user from the list or add a new user account.
3. Tap **2FA**.
4. Click the **Reset...** option for one or more listed authenticators.



*Reset authenticators on an account*

### To revoke a trusted device:


Some users may have authenticator access issues after syncing or no longer have access to a device with previous access to the Magento Admin. If you have the option enabled to track trusted devices for an authenticator, every device that accesses the Admin has a saved entry.

These entries detect the device and allow log in access without requiring authentication. The entries include the last IP address, the data and time of access, and a description including the type of system (Mac, PC, tablet, etc) and browser with version.

After revoking a listed device, the user must authenticate again if accessing the Admin from it.

1. On the Admin sidebar, tap **System**. Then under **Permissions**, choose **All Users**.
2. Do one of the followign:
  - Select and edit a user from the list.
  - Add a new user account.
3. Tap **2FA**.
4. In the **Trusted devices** grid, locate a device to remove from the account. Then, tap **Revoke**.

If the user accesses the Admin from this device again, they must authenticate regardless of any cookies with active duration.

Trusted devices			
Trusted devices	Last IP	Date and time	Description
		2018-07-06 19:32:38	Macintosh Firefox 61.0
			<a href="#">Revoke</a>

*Revoke a trusted, authenticated device*

## Emergency CLI Commands

Use the following commands if you lose access to the Admin.

### To disable 2FA:

If you have issues with 2FA, you can disable it from command-line. This will disable 2FA globally.

#### Disable Module

```
php bin/magento msp:security:tfa:disable
```

### To reset authenticator per account:

If you need to manually reset a single user configuration, enter the following from the command-line. The command restarts configuration and 2FA subscription for the user account.

#### Reset Authenticator per Account

```
php bin/magento msp:security:tfa:reset <username> <provider>
```

## Examples

#### Reset Google Authenticator

```
php bin/magento msp:security:tfa:reset admin google
```

#### Reset U2F Device

```
php bin/magento msp:security:tfa:reset admin u2fkey
```

#### Reset Authy

```
php bin/magento msp:security:tfa:reset admin authy
```

## Advanced Emergency Steps

Do not attempt modifying any database information without full understanding of modifications and database management. This is an advanced procedure.

In your database, you can modify the following tables and values to affect and override 2FA. We advise caution when making any changes directly to your database.

**Table:** `core_config_data`

`msp/twofactorauth/enabled` Set to zero to disable 2FA globally.

`msp/twofactorauth/force_providers` Delete this entry to remove forced providers option.

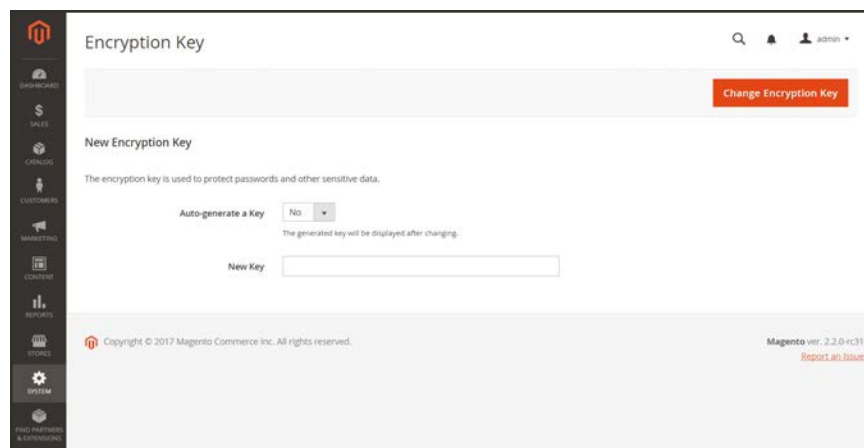
**Table:** `msp_tfa_user_config`

Delete one user row to reset the user's 2FA preference and configuration.

## Encryption Key

Magento uses an encryption key to protect passwords and other sensitive data. An industry-standard Advanced Encryption Standard (AES-256) algorithm is used to encrypt all data that requires decryption. This includes credit card data and integration (payment and shipping module) passwords. In addition, a strong Secure Hash Algorithm (SHA-256) is used to hash all data that does not require decryption.

During the initial installation, you are prompted to either let Magento generate an encryption key, or enter one of your own. The Encryption Key tool allows you to change the key as needed. The encryption key should be changed on a regular basis to improve security, as well as at any time the original key might be compromised. Whenever the key is changed, all legacy data is re-encoded using the new key.



*Encryption Key*

### Step 1: Make the File Writable

To change the encryption key, make sure that the following file is writable:

```
[your store]/app/etc/env.php
```

### Step 2: Change the Encryption Key

1. On the Admin sidebar, tap **System**. Then under **Other Settings**, choose **Manage Encryption Key**.
2. Do one of the following:
  - To generate a new key, set **Auto-generate Key** to “Yes”.
  - To use a different key, set **Auto-generate Key** to “No”. Then in the **New Key** field, enter or paste the key that you want to use.

3. Tap **Change Encryption Key**.

# Session Validation

Magento Commerce allows you to validate session variables as a protective measure against possible session fixation attacks, or attempts to poison or hijack user sessions. The Session Validation Settings determine how session variables are validated during each store visit, and if the session ID is included in the URL of the store.

Session Validation Settings

Validate REMOTE\_ADDR  
(global)

No

Use system value

Validate HTTP\_VIA  
(global)

No

Use system value

Validate HTTP\_X\_FORWARDED\_FOR  
(global)

No

Use system value

Validate HTTP\_USER\_AGENT  
(global)

No

Use system value

Use SID on Storefront  
(website)

Yes

Use system value

Allows customers to stay logged in when switching between different stores.


Session Validation Settings

The validation checks to see that visitors are who they say they are by comparing the value in the validation variables against the session data that is already stored in `$_SESSION` data for the user. Validation fails if the information is not transmitted as expected, and the corresponding variable is empty. Depending on the session validation settings, if a session variable fails the validation process, the client session immediately terminates.

Enabling all of the validation variables can help prevent attacks, but might also impact the performance of the server. By default, all session variable validation is disabled. We recommend that you experiment with the settings to find the best combination for your Magento installation. Activating all of the validation variables might prove to be unduly restrictive, and prevent access to customers who have Internet connections that pass through a proxy server, or that originate from behind a firewall. To learn more about session variables and their use, see the system administration documentation for your Linux system.



**To configure the Session Validation Settings:**

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Web**.
3. Expand  the **Session Validation Settings** section. Then, do the following:
  - a. To verify that the IP address of a request matches what is stored in the `$_SESSION` variable, set **Validate REMOTE\_ADDR** to “Yes.”
  - b. To verify that the proxy address of an incoming request matches what is stored in the `$_SESSION` variable, set **Validate HTTP\_VIA** to “Yes.”
  - c. To verify that the forwarded-for address of a request matches what is stored in the `$_SESSION` variable, set **Validate HTTP\_X\_FORWARDED\_FOR** to “Yes.”
  - d. To verify that the browser or device that is used to access the store during a session matches what is stored in the `$_SESSION` variable, set **Validate HTTP\_USER\_AGENT** to “Yes.”
  - e. If you want a user to stay logged in while switching between stores, set **Use SID on Frontend** to “Yes.”

If including SID with analytics, you must configure your analytics software to filter the SID from URLs, so the page visit counts are correct.


4. When complete, tap **Save Config**.

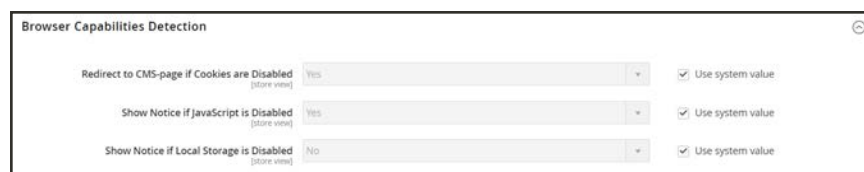
## Browser Capabilities Detection

As is true of most websites and applications on the Internet, Magento requires that the visitor's browser allow both cookies and JavaScript for full operations. However, occasionally a user's browser is set to the highest privacy setting that prevents both cookies and JavaScript. Your store can be configured to test the capabilities of each visitor's browser, and to display a notice if the settings need to be changed.

- If the browser's privacy settings disallow cookies, you can configure the system to automatically redirect them to the [Enable Cookies](#) page, which explains how to make the recommended settings with most browsers.
- If the browser's privacy settings disallow JavaScript, you can configure the system to display the following message above the header of every page:

### To configure browser capabilities detection:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Web**.
3. Expand  the **Browser Capabilities Detection** section, and do the following:
  - a. To display instructions that explain how to configure the browser to allow cookies, set **Redirect to CMS-page if Cookies are Disabled** to "Yes."
  - b. To display a banner above the header when JavaScript is disabled in the user's browser, set **Show Notice if JavaScript is Disabled** to "Yes."



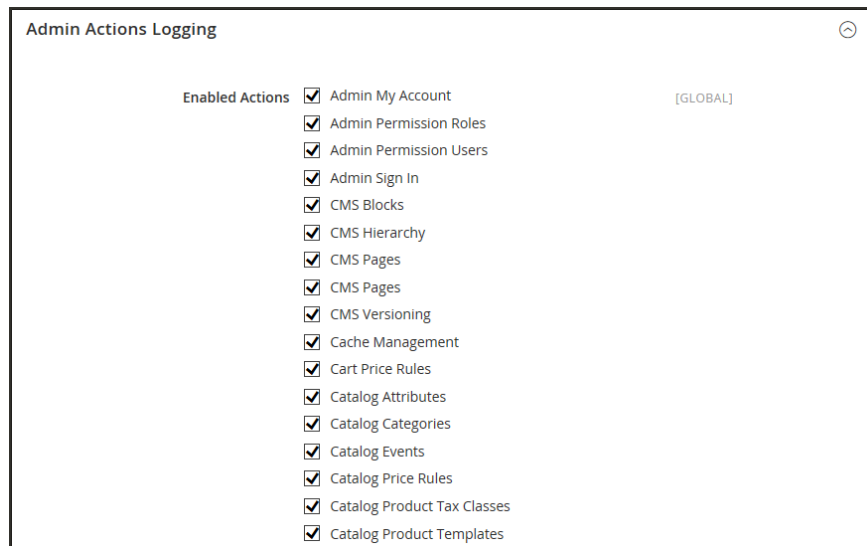
Browser Capabilities Detection		
Redirect to CMS-page if Cookies are Disabled <small>(store view)</small>	Yes	<input checked="" type="checkbox"/> Use system value
Show Notice if JavaScript is Disabled <small>(store view)</small>	Yes	<input checked="" type="checkbox"/> Use system value
Show Notice if Local Storage is Disabled <small>(store view)</small>	No	<input checked="" type="checkbox"/> Use system value

*Browser Capabilities Detection*

4. When complete, tap **Save Config**.

## Action Log

The Action Log tracks the activities of administrators who work in your store. For most events, the available information includes the action, the name of the user who performed it, whether it was a success or failure, and the ID of the object on which the action was performed. Additionally the IP and date are always logged.



*Admin Actions Logging*

### To configure the Action Log:


1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **Admin**.
3. Expand ☯ the **Admin Actions Logging** section, and do the following:
  - To enable admin logging, mark the checkbox.
  - To disable admin logging, clear the checkbox.
4. When complete, tap **Save Config.**

## Archive

In addition, you can control how long the log entries are stored and how often they are archived. The Admin Actions archive lists the CSV log files that are stored on the server. By default, the file name includes the current date in ISO format: yyyyMMddHH.csv.

Log archiving requires a **cron job** to be set up.

### To set up Admin Actions Log Archiving:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **System**.
3. Expand  the **Admin Actions Log Archiving** section, and do the following:
  - a. In the **Log Entry Lifetime, Days** field, enter the number of days that you want to keep the log entries in the database before they are removed.
  - b. Set **Log Archiving Frequency** to one of the following:
    - Daily
    - Weekly
    - Monthly
4. When complete, tap **Save Config.**



## CHAPTER 93:

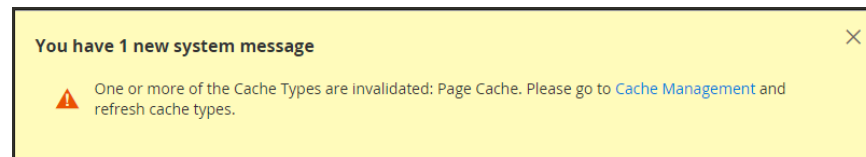
# Tools

In this section of the guide, you will learn how to perform routine index and cache management operations, back up the system, and use tools that help our Support team troubleshoot and resolve issues.

- [Cache Management](#)
- [Index Management](#)
- [Backups](#)
- [Cron \(Scheduled Backups\)](#)
- [Developer Tools](#)
- [Alternate Media Storage](#)
- [Web Setup Wizard](#)
- [Support](#)

## Cache Management

Magento's cache management system is an easy way to improve the performance of your site. Whenever a cache needs to be refreshed, a notice appears at the top of the workspace to guide you through the process. Follow the link to Cache Management, and refresh the invalid caches.

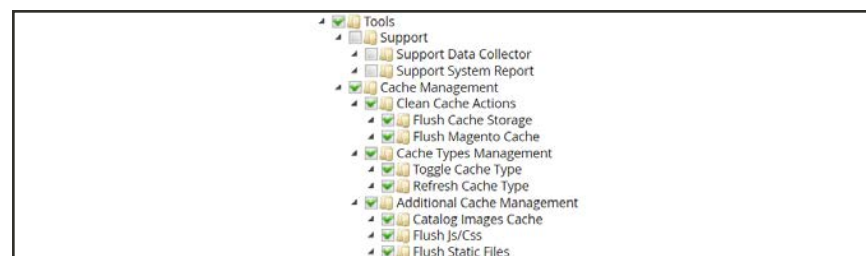


### *Update Cache Message*

The Cache Management page shows the status of each primary cache and its associated tag. The large buttons in the upper-right corner can be used to flush the Magento Cache, or the all-inclusive Cache Storage. At the bottom of the page there are additional buttons to flush the catalog product images cache and JavaScript/CSS cache.

After clearing a cache, always refresh your browser to make sure that you can see the most recent files. Clearing the Magento cache does not clear your web browser cache. You may need to clear the browser cache to see updated content.

Access to specific cache maintenance actions can be assigned to users by **role**, including options to view, toggle, and flush caches. Magento recommends only enabling flush actions to administrator level users. Providing access to all Cache Management features can impact your storefront's performance.



### *Cache Management Role Resources*

For technical information, see **Magento cache overview** in the developer documentation.

Security

\$ SALES

PRODUCTS

CUSTOMERS

MARKETING

CONTENT

REPORTS

STORES

SYSTEM

One or more of the Cache Types are invalidated: Page Cache. Please go to Cache Management and refresh cache types.

System Messages: 1

### Cache Management

Flush Cache Storage Flush Magento Cache

Refresh Submit 12 records found

Cache Type	Description	Tags	Status
<input type="checkbox"/> Configuration	Various XML configurations that were collected across modules and merged.	CONFIG	ENABLED
<input type="checkbox"/> Layouts	Layout building instructions.	LAYOUT_GENERAL_CACHE_TAG	ENABLED
<input type="checkbox"/> Blocks HTML output	Page blocks HTML.	BLOCK_HTML	ENABLED
<input type="checkbox"/> Collections Data	Collection data files.	COLLECTION_DATA	ENABLED
<input type="checkbox"/> Database DDL operations	Results of DDL queries, such as describing tables or indexes.	DB_DDL	ENABLED
<input type="checkbox"/> EAV types and attributes	Entity types declaration cache.	EAV	ENABLED
<input type="checkbox"/> Page Cache	Full page caching.	PPC	INVALIDATED
<input type="checkbox"/> Integrations Configuration	Integration configuration file.	INTEGRATION	ENABLED
<input type="checkbox"/> Integrations API Configuration	Integrations API configuration file.	INTEGRATION_API_CONFIG	ENABLED
<input type="checkbox"/> Target Rule	Target Rule Index.	TARGET_RULE	ENABLED
<input type="checkbox"/> Translations	Translation files.	TRANSLATE	ENABLED
<input type="checkbox"/> Web Services Configuration	REST and SOAP configurations, generated WSDL file.	WEBSERVICE	ENABLED

Cache Management

## Best practices for caching

Reindexing and caching have different purposes in Magento. **Indexes** track database information for increased search performance, faster data retrieval for storefronts, and more. Caches save loaded data, images, formats, and the like for increased performance loading and accessing the storefront.

- Always flush the cache after installing extensions/modules. You can install one or more extensions, then flush the cache.
- Flush the cache after installing Magento Commerce. For fresh installs, you should also reindex.
- Flush the cache after upgrading from one version of Open Source or Commerce to another.
- When flushing caches, consider the type of cache and scheduling the flushing during non-peak times. For example, pick a time when few customers may access the site such as late night or early morning. Clearing some cache types during peak times cause result in a high load on the Admin and may result in a down site until completed.
- When **reindexing**, you do not need to also perform a flush cache.

## To refresh specific caches:

1. Do one of the following:
  - Click the **Cache Management** link in the message above the workspace.
  - On the Admin sidebar, tap **System**. Then under Tools, choose **Cache Management**.
2. For each cache to be refreshed, mark the checkbox at the beginning of the row.
3. Set **Actions** to “Refresh,” and tap **Submit**.

## To perform mass actions:

1. To select a group of caches, set **Mass Actions** to one of the following:
  - Select All
  - Select Visible
2. Mark the checkbox of each cache to be targeted by the action.
3. Set **Actions** to “Refresh,” and tap **Submit**.



### To flush the product image cache:

1. From the Cache Storage Management page, under Additional Cache Management, click **Flush Catalog Images Cache** to clear pre-generated product image files.

The message, “Image cache was cleaned” appears at the top of the workspace.

2. Make sure to also clear the cache of your browser.

### To flush the JavaScript/CSS cache:

1. From the Cache Storage Management page, under Additional Cache Management, click **Flush JavaScript/CSS Cache** to clear any JavaScript and CSS files that have been merged into a single file.

The message, “The JavaScript/CSS cache has been cleaned” appears at the top of the workspace.

2. Make sure to also clear the cache of your browser.

### To flush using the Command Line:

Magento provides additional flush cache options using the command line. These options may require developer support to complete. For complete details and command options, see [Magento cache overview](#) and [Manage the cache](#).

## Control Descriptions

CONTROL	DESCRIPTION								
Mass Actions	Marks the checkbox of multiple caches. Options include: <table> <tr> <td>Select All</td><td>Marks the checkbox of all caches.</td></tr> <tr> <td>Unselect All</td><td>Clears the checkbox of all caches.</td></tr> <tr> <td>Select Visible</td><td>Marks the checkbox of all visible caches.</td></tr> <tr> <td>Unselect Visible</td><td>Clears the checkbox of all visible caches.</td></tr> </table>	Select All	Marks the checkbox of all caches.	Unselect All	Clears the checkbox of all caches.	Select Visible	Marks the checkbox of all visible caches.	Unselect Visible	Clears the checkbox of all visible caches.
Select All	Marks the checkbox of all caches.								
Unselect All	Clears the checkbox of all caches.								
Select Visible	Marks the checkbox of all visible caches.								
Unselect Visible	Clears the checkbox of all visible caches.								
Actions	Determines the action to be applied to all selected caches. Options include: <table> <tr> <td>Enable</td><td>Enables all selected caches.</td></tr> <tr> <td>Disable</td><td>Disables all selected caches.</td></tr> <tr> <td>Refresh</td><td>Refreshes all selected caches.</td></tr> </table>	Enable	Enables all selected caches.	Disable	Disables all selected caches.	Refresh	Refreshes all selected caches.		
Enable	Enables all selected caches.								
Disable	Disables all selected caches.								
Refresh	Refreshes all selected caches.								
Submit	Applies the action to all selected caches.								

## Button Descriptions

BUTTON	DESCRIPTION
Flush Magento Cache	Removes all items in the default Magento cache (var/cache), according to their associated Magento tags.
Flush Cache Storage	Removes all items from the cache, regardless of Magento tag. If your system uses an alternate cache location, any cached files used by other applications are removed in the process.
Flush Catalog Images Cache	Removes all automatically resized and watermarked catalog images that are stored at: media/catalog/product/cache. If recently uploaded images aren't reflected in the catalog, try flushing the catalog and refreshing your browser.
Flush JavaScript/CSS Cache	Removes the merged copy of JavaScript and CSS files from the cache. If recent changes to the style sheet or JavaScript aren't reflected in the store, try flushing the JavaScript/CSS cache and refreshing your browser.
Flush Static Files Cache	Removes preprocessed view files and static files.

## Cache Descriptions

CACHE	DESCRIPTION
Configuration	Various XML configurations that were collected across modules and merged. Associated Tag: CONFIG  System: config.xml local.xml  Module: config.xml
Layouts	Layout building instructions. Associated Tag: LAYOUT_GENERAL_CACHE_TAG
Blocks HTML output	Page blocks HTML. Associated Tag: BLOCK_HTML
Collections Data	Collection data files. Associated Tag: COLLECTION_DATA
Reflection Data	Clears API interface reflection data, that is typically generated during runtime.
Database DDL operations	Results of DDL queries, such as describing tables or indexes. Associated Tag: DB_DDL
Compiled Config	Results of code compilation. Associated Tag: COMPILED_CONFIG
EAV types and attributes	Entity types declaration cache. Associated Tag: EAV
Customer Notification	Temporary notifications that appear in the user interface.
Integrations Configuration	Integration configuration file. Associated Tag: INTEGRATION
Integrations API Configuration	Integrations API configuration file. Associated Tag: INTEGRATION_API_CONFIG
Page Cache	Full page caching. Associated Tag: FPC
Translations	Translation files. Associated Tag: TRANSLATE
Web Services Configuration	REST and SOAP configurations, generated WSDL file. Associated Tag: WEBSERVICE

## Cache Management Role Resources

### RESOURCE

#### Cache Management

Clean Cache Actions

Flush Cache Storage

**Cache Management Role Resources (cont.)****RESOURCE**

Flush Magento Cache

Cache Type Management

Toggle Cache Type

Refresh Cache Type

Additional Cache Management

Catalog Images Cache

Flush Js/Css

Flush Static Files

## Full-Page Cache

Magento Commerce uses full-page caching on the server to quickly display category, product, and CMS pages. Full-page caching improves response time and reduces the load on the server. Without caching, each page might need to run blocks of code and retrieve information from the database. However, with full-page caching enabled, a fully-generated page can be read directly from the cache. For more technical information, see: [Configure and Use Varnish](#)

We recommend Varnish to be used only in a production environment.

Cached content can be used to process the requests from similar types of visits. As a result, pages shown to a casual visitor might differ from those shown to a customer. For the purposes of caching, each visit is one of three types:

Non-sessioned	During a non-sessioned visit, a shopper views pages, but does not interact with the store. The system caches the content of each page viewed, and serves them to other non-sessioned shoppers.
Sessioned	During a sessioned visit, shoppers who interact with the store—through activities such as comparing products or adding products to the shopping cart—are assigned a session ID. Cached pages that are generated during the session are used only by that shopper during the session.
Customer	Customer sessions are created for those who have registered for an account with your store and shop while logged in to their accounts. During the session, customers can be presented with special offers, promotions, and prices that are based on the customer group to which they are assigned.

### To configure the full-page cache:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **System**.
3. Expand ☺ the **Full Page Cache** section.



### Full Page Cache

4. Set **Caching Application** to one of the following:
  - Built-in Application
  - Varnish Caching
5. To set the time-out for the page cache, enter the **TTL for public content**. (The default value is 86400)
6. If using Varnish, complete the **Varnish Configuration** section as follows:
  - a. In the **Access list** field, enter the IP addresses that can purge the Varnish configuration to generate a config file. Separate multiple entries with a comma. The default value is “localhost.”
  - b. In the **Backend host** field, enter the IP address of the backend host that generates config files. The default value is “localhost.”
  - c. In the **Backend port** field, identify the backend port that is used to generate config files. The default value is: “8080.”
  - d. To export the configuration as a varnish.vcl file, tap the button for the version of Varnish that you use.
    - Export VCL for Varnish 3
    - Export VCL for Varnish 4



The screenshot shows the 'Varnish Configuration' section of a Magento configuration page. It contains three text input fields: 'Access list', 'Backend host', and 'Backend port'. Each field has a '[global]' label and a descriptive tooltip. Below these fields are two buttons: 'Export VCL for Varnish 3' and 'Export VCL for Varnish 4', both preceded by an 'Export Configuration [global]' label.

**Varnish Configuration**

**Access list** [global]  
IPs access list separated with \,\' that can purge Varnish configuration for config file generation. If field is empty default value localhost will be saved.

**Backend host** [global]  
Specify backend host for config file generation. If field is empty default value localhost will be saved.

**Backend port** [global]  
Specify backend port for config file generation. If field is empty default value 8080 will be saved.

**Export Configuration** [global]  
Export VCL for Varnish 3

**Export Configuration** [global]  
Export VCL for Varnish 4

### *Varnish Configuration*

7. When complete, tap **Save Config**.

## Index Management

Magento reindexes automatically whenever one or more items change. Actions that trigger reindexing include price changes, creating catalog or shopping cart price rules, adding new categories, and so on. To optimize performance, Magento accumulates data into special tables using indexers. As the data changes, the indexed tables must be updated—or reindexed. Magento reindexes as a background process, and your store remains accessible during the processes.

Reindexing data speeds up processing, and reduces the time the customer has to wait. For example, if you change the price of an item from \$4.99 to \$3.99, Magento reindexes the data to show the price change in the store. Without indexing, Magento would have to calculate the price of every product on the fly—taking into account shopping cart price rules, bundle pricing, discounts, tier pricing, and so on. Loading the price for a product might take longer than the customer is willing to wait.

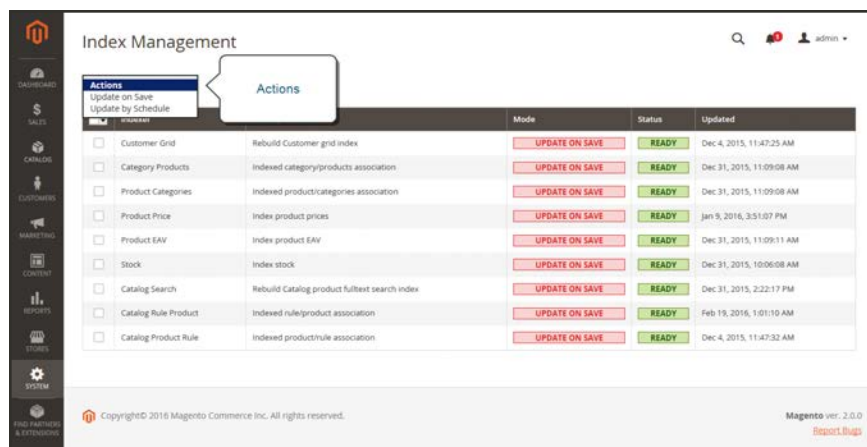
The indexers can be set to either update on save or on schedule. All indexes can use either option, except Customer Grid which only supports on save. When indexing on save, Magento starts a reindex on save actions. The Index Management page will update and flush the reindex message within a minute or two. When reindexing on a schedule, a reindex runs according to a schedule as a cron job. A system message appears if a **cron job** is not available to update any indexers that become invalid. Your store remains accessible during reindex processes.

When you need to reindex, a notification appears at the top of the page. The index and message clears based on the reindex mode and potential actions you take.



*Reindex notification*

For technical information, see [Indexing overview](#) in DevDocs developer documentation.



*Index Management*

- ☒ Index Management has a slightly different presentation for flat product catalogs.
- ☒ To avoid problems when multiple Admin users update objects that trigger automatic reindexing, we recommend that you set all indexers to run on schedule as **cron jobs**. Otherwise, every time an object is saved, any objects with interdependencies might cause a deadlock. Symptoms of a deadlock include high CPU usage and MySQL errors. As a best practice, we recommend that you use scheduled indexing.



## Best practices for reindexing

Reindexing and caching have different purposes in Magento. Indexes track database information for increased search performance, faster data retrieval for storefronts, and more. **Caches** save loaded data, images, formats, and the like for increased performance loading and accessing the storefront.

- Typically, you want to reindex when updating data in Magento.
- If you have a large store or multiple stores, you may want to set indexers like category and products to scheduled cron jobs due to potential reindex looping. You may want to set the reindex on a schedule during non-peak hours.
- When reindexing, you do not need to also perform a flush cache.
- For fresh Magento installations, you need to flush the cache and reindex.
- Flushing caches and reindexing does not flush your computer's web browser cache. We recommend also flushing the browser cache after completing updates to your storefront.

## To change the index mode:

1. On the Admin sidebar, tap **System**. Then under **Tools**, choose **Index Management**.
2. Mark the checkbox of each indexer that you want to change.
3. Set **Actions** to one of the following:
  - Update on Save
  - Update by Schedule

**Important:** Customer Grid can only be reindexed using "Update on Save". This index does not support "Update by Schedule".

4. Tap **Submit** to apply the change to each selected indexer.

## Column Descriptions

COLUMN	DESCRIPTION
Indexer	The name of the indexer.
Description	A description of the indexer.
Mode	Indicates the current update mode for each indexer. Options:

**Column Descriptions (cont.)**

COLUMN	DESCRIPTION	
	Update on Save	The index is set to update whenever an entity change is saved. These entities include products, categories, and customers. When the save action completes, a series of steps begin catching the changes and updating the index. The Index Management page will update and flush the reindex message within a minute or two.
	Update on Schedule	The index is set to update on schedule according to <b>cron jobs</b> . The cron job includes the schedule interval for reindexing, writing updates to the index when run.
Status	Displays one of the following:	
	Ready	The index is up-to-date.
	Scheduled	Reindexing is scheduled to take place.
	Running	Reindexing is currently running.
	Reindex Required	A change has been made that requires reindexing, but the indexers cannot be updated automatically. Check to see if <b>cron</b> is available and configured correctly.
Updated	Indicates the date and time an index was last updated.	

**To reindex using the Command Line:**

Magento provides additional reindex options using the command line. These options may require developer support to complete. For complete details and command options, see **Reindex** in **Manage the indexers**. The DevDocs PHP Developer Guide also includes an **Indexing** section.

# Index Trigger Events

## Reindexing Triggers

INDEX TYPE	REINDEXING EVENT
Product Prices	Add customer group Change configuration settings
Flat catalog <sup>1</sup> product data	Add store Add store group Add, edit, or delete attribute (for searching and filtering)
Flat catalog category data	Add store Add store group Add, edit, or delete attribute (for searching and filtering)
Catalog category/product index	Add, edit, or delete products (single, mass, and import) Change product-to-category relations Add, edit, or delete categories Add or delete stores Delete store groups Delete websites
Catalog search index	Add, edit, or delete products (single, mass, and import) Add or delete stores Delete store groups Delete websites
Stock status index	Change inventory configuration settings.
Category permissions index	Add store, add store group, add or delete or update attribute (for searching and filtering)

<sup>1</sup> The flat product and category indexers also influence how catalog and shopping cart price rules are indexed. If you have a large number of SKUs (about 500,000 or more), you will notice a dramatic improvement in indexing time for price rules. To take advantage of this improvement, you must enable [Use Flat Catalog Product](#).

## Index Actions and Controls

### Index Actions

ACTION	RESULT	TO CONTROL
Creating a new store, new customer group, or any action listed in “Actions that Cause a Full Reindex.”	Full reindex	Full reindexing is performed on the schedule determined by your Magento cron job.
Bulk loading of items in the following ways: <ul style="list-style-type: none"> <li>• Magento import/export</li> <li>• Direct SQL query</li> <li>• Any other method that directly adds, changes, or deletes data.</li> </ul>	Partial reindex (only changed items are reindexed)	At the frequency determined by your Magento cron job.
Changing scope (for example, from global to website)	Partial reindex (only changed items are reindexed)	At the frequency determined by your Magento cron job.

## Events that Trigger Full Reindexing

### Full Reindex Triggers

INDEXER	EVENT
Catalog Category Flat Indexer	Create a new web store Create a new web store view Create, or delete an attribute that is any of the following: <ul style="list-style-type: none"> <li>• Searchable or visible in advanced search</li> <li>• Filterable</li> <li>• Filterable in search</li> <li>• Used for sorting</li> </ul> Change an existing attribute to be any of the preceding. Enable flat category storefront options
Catalog Product Flat Indexer	Create a new web store Create a new web store view Create, or delete an attribute that is any of the following:

**Full Reindex Triggers (cont.)**

INDEXER	EVENT						
	<ul style="list-style-type: none"> <li>• Searchable or visible in advanced search</li> <li>• Filterable</li> <li>• Filterable in search</li> <li>• Used for sorting</li> </ul> <p>Change an existing attribute to be any of the preceding.</p> <p>Enable flat category storefront options</p>						
Stock status indexer	<p>When the following Catalog Inventory options change in the system configuration:</p> <table> <tr> <td>Stock Options</td><td>Display Out of Stock Products</td></tr> <tr> <td>Product Stock Options</td><td>Manage Stock</td></tr> </table>	Stock Options	Display Out of Stock Products	Product Stock Options	Manage Stock		
Stock Options	Display Out of Stock Products						
Product Stock Options	Manage Stock						
Price Indexer	<p>Adding a new customer group.</p> <p>When any of the following Catalog Inventory options change in the system configuration:</p> <table> <tr> <td>Stock Options</td><td>Display Out of Stock Products</td></tr> <tr> <td>Product Stock Options</td><td>Manage Stock</td></tr> <tr> <td>Price</td><td>Catalog Price Scope</td></tr> </table>	Stock Options	Display Out of Stock Products	Product Stock Options	Manage Stock	Price	Catalog Price Scope
Stock Options	Display Out of Stock Products						
Product Stock Options	Manage Stock						
Price	Catalog Price Scope						
Category or Product Indexer	<p>Create or delete a store view</p> <p>Delete a store</p> <p>Delete a website</p>						

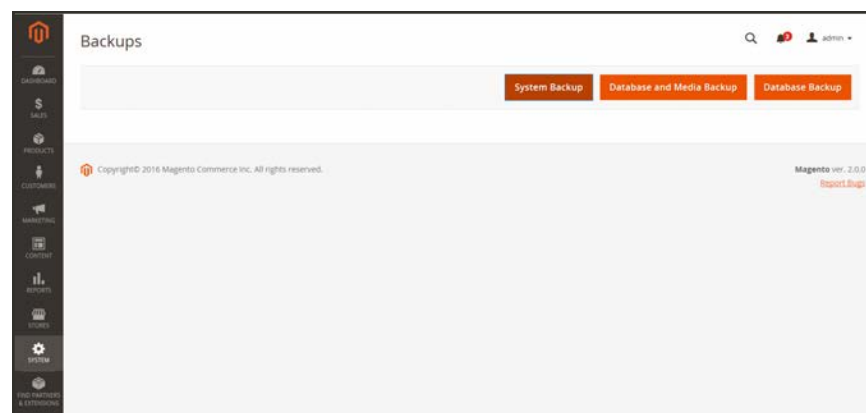
## Backups

Magento Commerce gives you the ability to backup different parts of the system—such as the file system, database, and media files—and to roll back automatically. A record for each backup appears in the grid on the Backups page. Deleting a record from the list deletes the archived file as well. Database backup files are compressed using the .GZ format. For the system backups and database and media backups, the .TGZ format is used. As a best practice, you should restrict access to backup tools, and backup before installing extensions and updates.

- ☒ **Restrict access to backup tools.** Access to the Backups and roll back management tool can be restricted by configuring user permissions for backup and roll back resources. To restrict access, leave the corresponding checkbox unselected. If you need to grant access to roll back resources, you must grant access to backup resources as well.
- ☒ **backup before installing extensions and updates.** Always perform a backup before you install an extension or update. **Component Manager** includes a backup option that you can use before installing an extension or upgrading to a new release.

**Disabled feature:** Magento backup is disabled by default. To enable may require developer assistance. See Magento DevDocs for the command to enable backups: [Back up and roll back the file system, media, and database](#).

**Deprecation Notice!** Magento backup features are deprecated as of v2.1.16. We recommend that all merchants investigate additional backup technologies and binary backup tools (such as Percona XtraBackup).



*Backups*

### To create a backup:

1. On the Admin sidebar, tap **System**. Then under **Tools**, choose **Backups**.
2. In the upper-right corner, tap the button for the type of backup you want to create:
 

System Backup	Creates a complete backup of the database and the file system. During the process, you can choose to include the media folder in the backup.
Database and Media Backup	Creates a backup of the database and the media folder.
Database Backup	Creates a backup of the database.
3. To put the store into maintenance mode during the backup, mark the checkbox. When the backup is complete, maintenance mode is turned off automatically.
4. For a system backup, mark the **Include Media folder to System Backup** checkbox if you want to include the media folder. Then when prompted, confirm the action.

### To schedule backups

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **System**.
3. Expand ☺ the **Scheduled Backup Settings** section, and do the following:
4. When complete, tap **Save Config**.

## Cron (Scheduled Tasks)

Magento performs some operations on schedule by periodically running a script. You can control the execution and scheduling of Magento cron jobs from the Admin. Store operations that run according to a cron schedule include:


- [Email](#)
- [Catalog Price Rules](#)
- [Newsletters](#)
- [XML Sitemap Generation](#)
- [Currency Rate Updates](#)

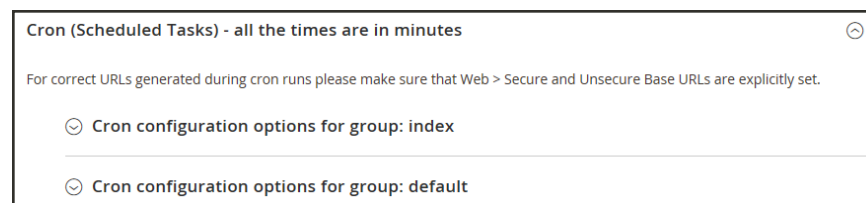
In addition, you can configure the following to run according to a cron schedule:

- Order System Grid Updates and Reindexing
- Pending Payment Lifetime

Make sure that the [base URLs](#) for the store are set correctly, so the URLs that are generated during cron operations are correct. To learn more, see: [Setting Up Cron Jobs](#).

### To configure cron:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **System**.
3. Expand  the **Cron** section.

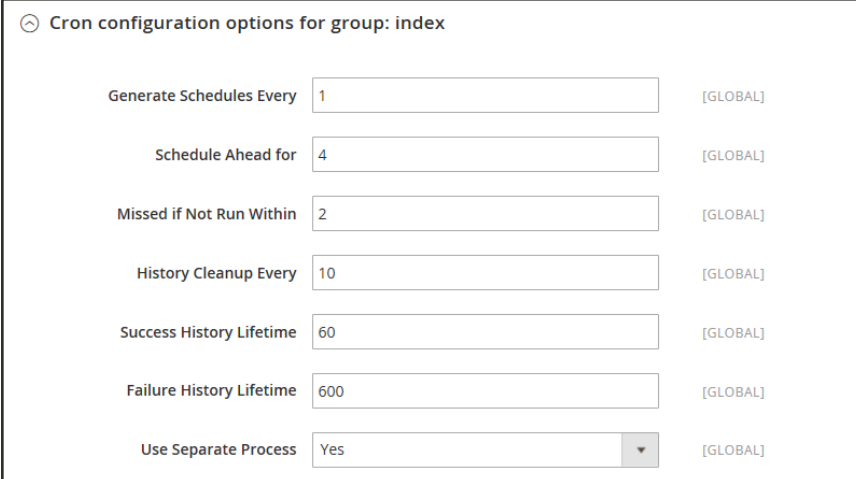


*Cron (Scheduled Tasks)*



4. Then, complete the following settings for the **Index** and **Default** groups. The settings are the same in each section.

- Generate Schedules Every
- Schedule Ahead for
- Missed if not Run Within
- History Cleanup Every
- Success History Lifetime
- Failure History Lifetime
- Use Separate Process



The screenshot shows a configuration window titled "Cron configuration options for group: index". It contains seven settings, each with a text input field and a "[GLOBAL]" label to its right. The settings and their values are: "Generate Schedules Every" (1), "Schedule Ahead for" (4), "Missed if Not Run Within" (2), "History Cleanup Every" (10), "Success History Lifetime" (60), "Failure History Lifetime" (600), and "Use Separate Process" (Yes, with a dropdown arrow).

Setting	Value	Scope
Generate Schedules Every	1	[GLOBAL]
Schedule Ahead for	4	[GLOBAL]
Missed if Not Run Within	2	[GLOBAL]
History Cleanup Every	10	[GLOBAL]
Success History Lifetime	60	[GLOBAL]
Failure History Lifetime	600	[GLOBAL]
Use Separate Process	Yes	[GLOBAL]

*Cron Configuration for Group: Index*

5. When complete, tap **Save Config.**

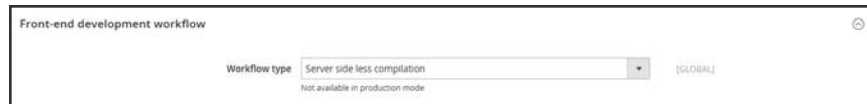
## Developer Tools

Use the Advanced Developer tools to determine the compilation mode during frontend development, create a whitelist of IP addresses, display template path hints, and make spot changes to text in the interface of the storefront and Admin.

- [Frontend Development Workflow](#)
- [Using Static File Signatures](#)
- [File Optimization](#)
- [Developer Client Restrictions](#)
- [Template Path Hints](#)
- [Translate Inline](#)

## Frontend Development Workflow

The Frontend Development Workflow type determines if Less compilation takes place on the client- or server side during development. Less is an extension of CSS that has additional features and conventions, and that produces streamlined code. Client-side Less compilation is recommended for theme development. Server-side compilation is the default mode. The development workflow options are not available for stores in production mode. To learn more, see [Client-side LESS compilation vs. server-side](#) in the developer documentation.



### *Front-end Development Workflow*

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **Developer**.
3. Expand the **Front-end Development Workflow** section.
4. Set **Workflow Type** to one of the following:

Client side less  
compilation

Compilation takes place in the browser using the native less.js library.

Server side less  
compilation

Compilation takes place on the server using the Less PHP library. This is the default mode for production.

5. When complete, tap **Save Config.**

## Using Static File Signatures

Adding a digital signature to the URL of static files makes it possible for browsers to detect when a newer version of the file is available. Static files that can be tracked with digital signatures include JavaScript, CSS, images, and fonts. The signature is appended to the path directly after the base URL. If a file's signature differs from what is currently stored in the browser's cache, then the newer version of the file is used. To learn more, see [Static File Processing](#) in the developer documentation.

The image shows a screenshot of the 'Static Files Settings' panel in the Magento Admin interface. The panel has a title bar with the text 'Static Files Settings' and a close button (a circle with an 'x') on the right. Below the title bar, there is a label 'Sign Static Files' followed by a dropdown menu currently set to 'No'. To the right of the dropdown is a small downward arrow icon. Further to the right, the text '[GLOBAL]' is displayed. The entire panel is enclosed in a thin black border.

*Static File Settings*

### To enable signed static files:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **Developer**.
3. Expand the **Static Files Settings** section.
4. Set **Sign Static Files** to “Yes.”
5. When complete, tap **Save Config**.

## Optimizing Resource Files

The time it takes to load resource files can be reduced by merging and bundling files, and by minimizing code.

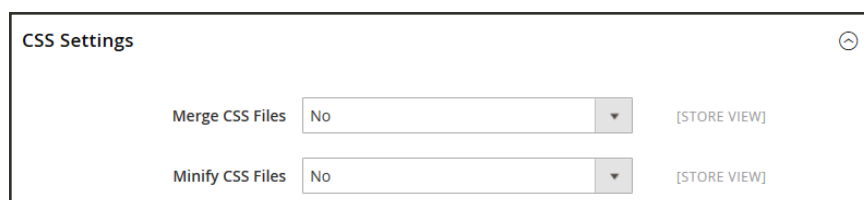
- Merging combines separate files of the same type into a single file.
- Bundling is a technique that groups separate files in order to reduce the number of HTTP requests that are required to load a page.
- Minification removes spaces, line breaks, and comments, but does not affect the functionality of the code. Because minimized files cannot be edited, the process should be applied only when you are ready to go into production.

By default, Magento does not merge, bundle, or minimize files, and the project developer should determine which file optimization methods should be used. The following operations are supported for each file type:

FILE TYPE	SUPPORTED OPERATIONS
CSS Files	<ul style="list-style-type: none"> <li>• Merge</li> <li>• Minify</li> </ul>
JavaScript Files	<ul style="list-style-type: none"> <li>• Merge</li> <li>• Bundle</li> <li>• Minify</li> </ul>
Template Files	<ul style="list-style-type: none"> <li>• Minify</li> </ul>

### To optimize resource files:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **Developer**.
3. To optimize CSS files, do the following:
  - a. Expand ☺ the **CSS Settings** section. Then, do the following:
  - b. Set **Merge CSS Files** to “Yes.”
  - c. Set **Minify CSS Files** to “Yes.”




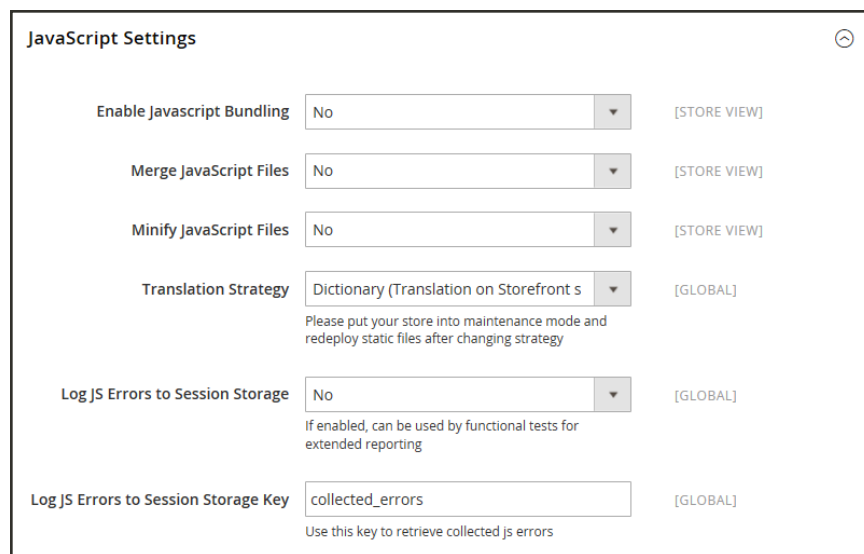
CSS Settings

Merge CSS Files No [STORE VIEW]

Minify CSS Files No [STORE VIEW]


### CSS Settings

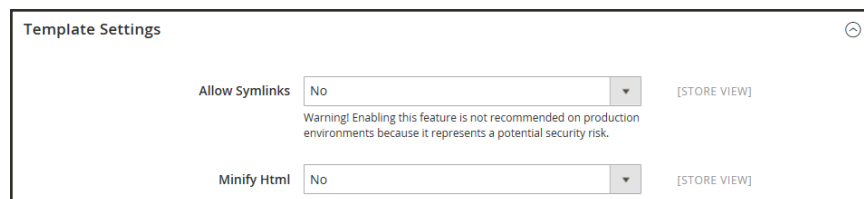
4. To optimize JavaScript files, do the following:
  - a. Expand  the **JavaScript Settings** section. Then, do the following:
  - b. Set **Merge JavaScript Files** to “Yes.”
  - c. Set **Minify JavaScript Files** to “Yes.”



JavaScript Settings	
Enable Javascript Bundling	No [STORE VIEW]
Merge JavaScript Files	No [STORE VIEW]
Minify JavaScript Files	No [STORE VIEW]
Translation Strategy	Dictionary (Translation on Storefront s) [GLOBAL] <small>Please put your store into maintenance mode and redeploy static files after changing strategy</small>
Log JS Errors to Session Storage	No [GLOBAL] <small>If enabled, can be used by functional tests for extended reporting</small>
Log JS Errors to Session Storage Key	collected_errors [GLOBAL] <small>Use this key to retrieve collected js errors</small>

### *JavaScript Settings*

5. To minify PHTML template files, do the following:
  - a. Expand  the **Template Settings** section.
  - b. Set **Minify Html** to “Yes.”



Template Settings	
Allow Symlinks	No [STORE VIEW] <small>Warning! Enabling this feature is not recommended on production environments because it represents a potential security risk.</small>
Minify Html	No [STORE VIEW]

### *Template Settings*

6. When complete, tap **Save Config.**

## Developer Client Restrictions

Before using a tool such as [Template Path Hints](#), make sure to add your IP address to the Developer Client Restrictions whitelist to avoid disrupting the shopping experience of customers in the store. If you don't know your IP address, you can search for it online.

### Add Your IP Address to the Whitelist

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **Developer**.
3. Expand ☯ the **Developer Client Restrictions** section.

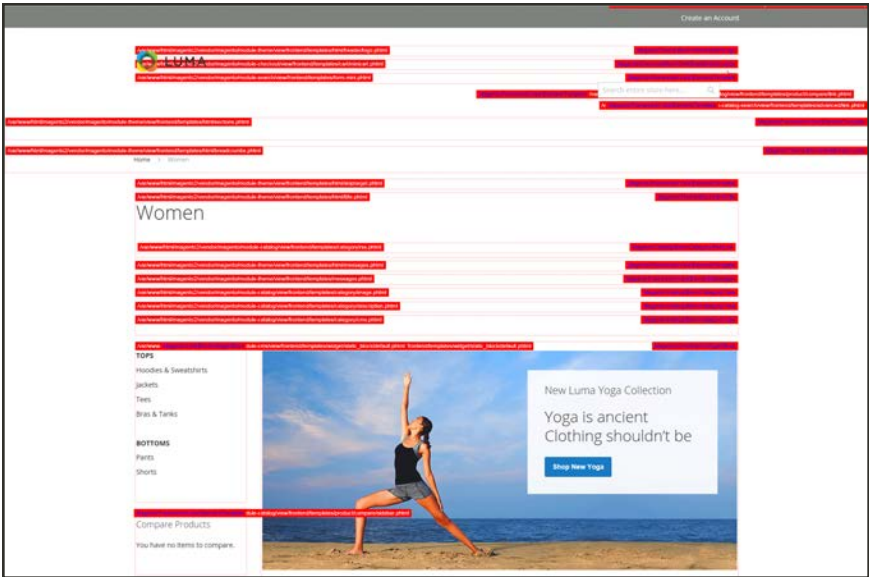
A screenshot of the 'Developer Client Restrictions' configuration panel in the Magento Admin. The panel has a title bar with the text 'Developer Client Restrictions' and a collapse icon (☯) on the right. Below the title bar, there is a label 'Allowed IPs (comma separated)' followed by a text input field. To the right of the input field is a '[STORE VIEW]' button. Below the input field, there is a small note: 'Leave empty for access from any location.'

### *Developer Client Restrictions*

4. In the **Allow IPs** field, enter your IP address. If access is needed from multiple IP addresses, separate each with a comma.
5. When complete, tap **Save Config.**
6. When prompted, refresh any invalid caches.

# Template Path Hints

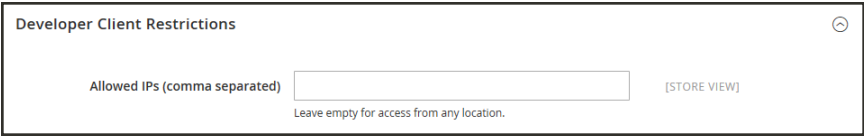
Template Path Hints are a diagnostic tool that adds notation with the path to each template that is used on the page. Template path hints can be enabled for either the storefront or the Admin.



*Template Path Hints in Storefront*

## Step 1: Whitelist Your IP Address


Before using template path hints, add your IP address to the **whitelist**, so you won't interfere with customers who are shopping in the store. When you are finished, make sure to clear the Magento cache to remove all hints from the store.

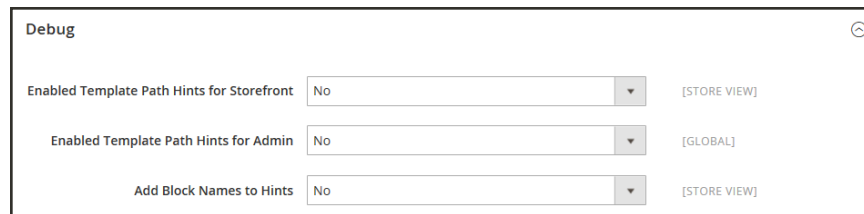


*Developer Client Restrictions*



## Step 2: Enable Template Path Hints

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **Developer**.
3. Expand  the **Debug** section. Then, do the following:



### *Debug*

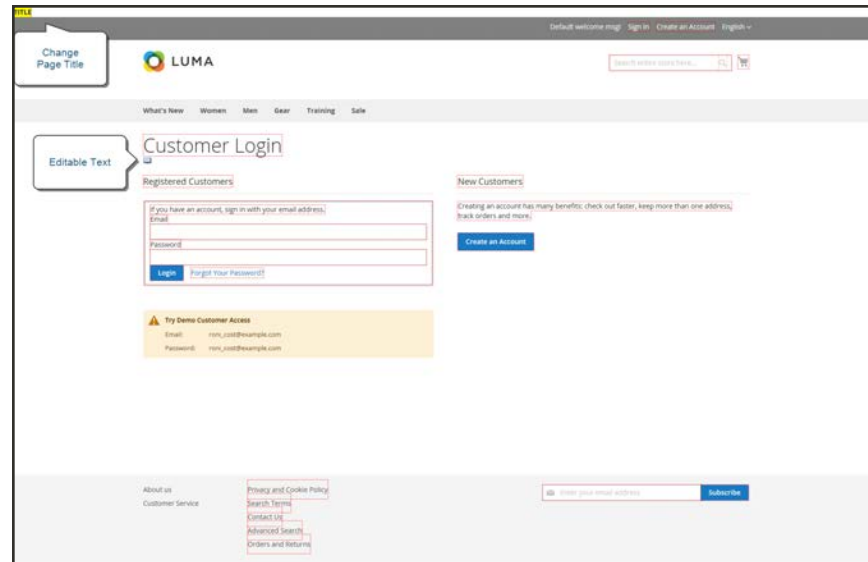
- a. To activate template path hints for the store, set **Enabled Template Path Hints for Storefront** to “Yes.”
  - b. To activate template path hints for the Admin, set **Enabled Template Path Hints for Admin** to “Yes.”
  - c. To include the names of blocks, set **Add Block Names to Hints** to “Yes.”
4. When complete, tap **Save Config**.
  5. When you are finished, return to the Admin to disable the hints and clear the cache.

## Step 3: Clear the Cache

1. On the Admin sidebar, tap **System**. Then under **Tools**, choose **Cache Management**.
2. In the upper-right corner, tap **Flush Magento Cache**.

## Translate Inline

You can use the Translate Inline tool to touch up the interface text to reflect your voice and brand. When the Translate Inline mode is activated, any text on the page that can be edited is outlined in red. It's easy to edit field labels, messages, and other text that appears throughout the storefront and Admin. For example, many themes use terminology such as “My Account,” “My Wishlist,” and “My Dashboard,” to help customers find their way around. However, you might prefer to simply use the words “Account,” “Wishlist,” and “Dashboard.”



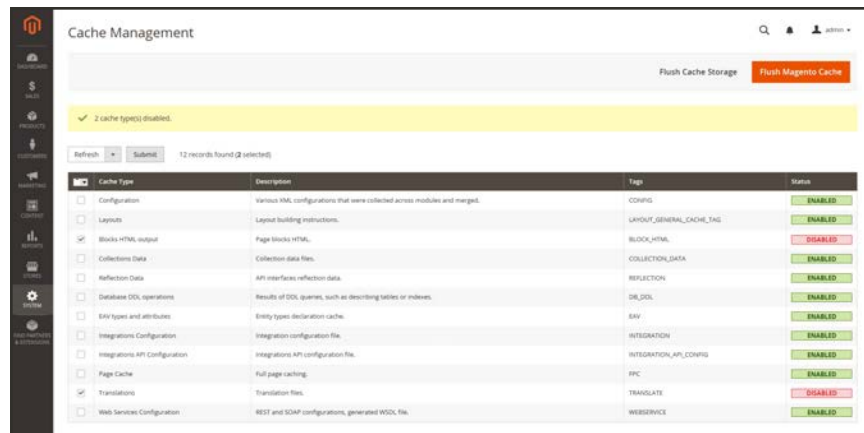
*Translatable Text*

If your store is available in multiple languages, you can make fine adjustments to the translated text for the locale. On the server, interface text is maintained in a separate CSV file for each output block, and is organized by locale. As an alternate approach, rather than use the Translate Inline tool, you can also edit the CSV files directly on the server.

To use the Translate Inline tool, your browser must allow pop-ups.

### Step 1: Disable Output Caches

1. On the Admin sidebar, tap **System**. Then under **Tools**, choose **Cache Management**.
2. Mark the following checkboxes:
  - Blocks HTML output
  - Page Cache
  - Translations
3. Set the **Actions** control to “Disable.” Then, tap **Submit**.

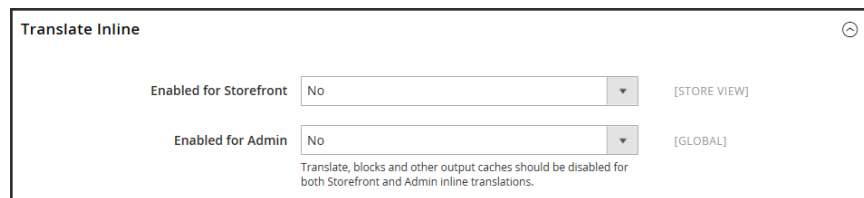


*Disable Output Caches*

## Step 2: Enable the Translate Inline Tool

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. To work with a specific store view, set the **Store View** that is to be updated.
3. In the panel on the left under **Advanced**, choose **Developer**.
4. Expand ☏ the **Translate Inline** section. Then if necessary, clear the **Use Website** checkbox.

The Enabled for Admin option is not available when editing a specific store view.



*Translate Inline*

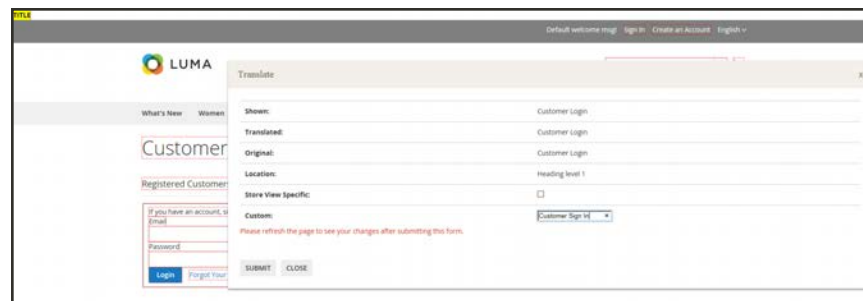
5. Set **Enabled for Storefront** to “Yes.”
6. When complete, tap **Save Config**.
7. When prompted, refresh the invalid caches, but leave the disabled caches as they are for now.

### Step 3: Update the Text

1. Open your storefront in a browser, and go to the page that you want to edit. If necessary, use the language chooser to change the store view.

Each string of text that can be translated is outlined in red. When you hover over any text box, a book icon (📖) appears.

2. Tap the book icon (📖) to open the Translate window. Then, do the following:
  - a. If the change is for the specific store view, mark the **Store View Specific** checkbox.
  - b. Enter the new **Custom** text.
  - c. When complete, tap **Submit**.

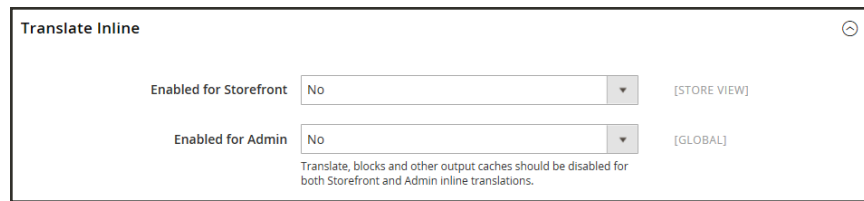


*Enter Custom Text*

3. To see your changes in the store, press the **F5** key to refresh the browser.
4. Repeat this process for any elements in the store to be changed.

### Step 4: Restore Original Settings

1. Return to the Admin of your store. On the Admin sidebar, tap **Store**. Then under **Settings**, choose **Configuration**.
  - a. Set **Store View** to the specific view that was edited.
  - b. In the panel on the left under **Advanced**, choose **Developer**.
  - c. Expand the **Translate Inline** section.

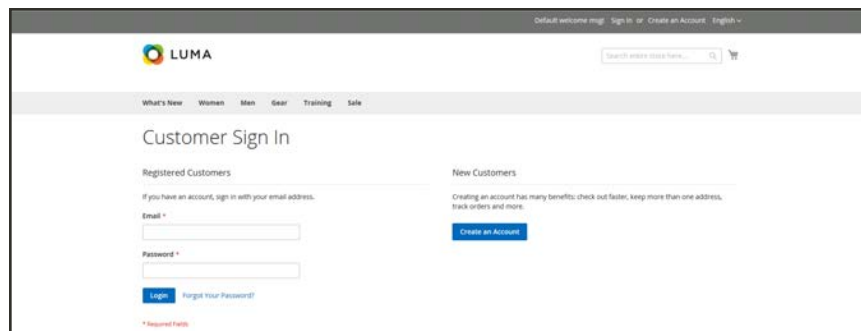


### *Translate Inline*

- a. Set **Enabled for Frontend** to “No.”
  - b. When complete, tap **Save Config.**
2. On the Admin sidebar, tap **System**. Then under **Tools**, choose **Cache Management**.
    - a. Mark the checkbox of the following output caches that were previously disabled:
      - Blocks HTML output
      - Page Cache
      - Translations
    - b. Set the **Actions** control to “Enable.” Then, tap **Submit**.
    - c. When prompted, refresh any invalid caches.

### Step 5: **Verify the Changes in Your Store**

Go to your storefront and examine each page that was updated to make sure the changes are correct. In this example, “Customer Login” was changed to “Customer Sign In.” If changes were made to a specific view, use the Language Chooser to switch to the correct view.

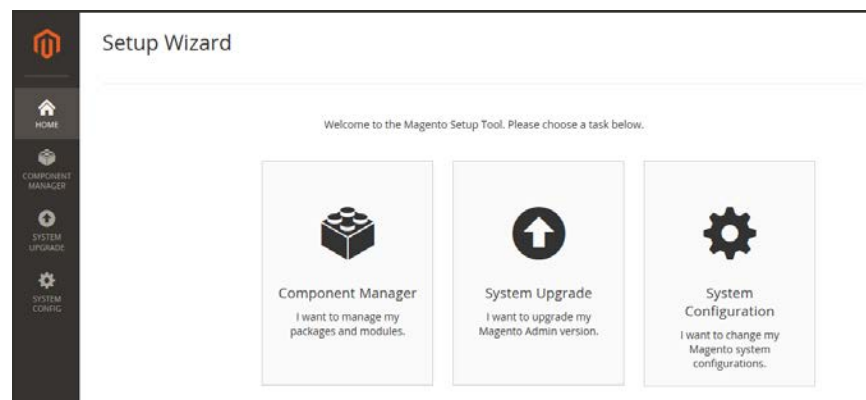


### *Customer Sign In*

## Setup Wizard

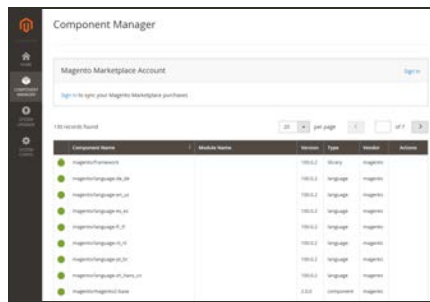
The Setup Wizard can be used to easily install and uninstall components, modules, and extensions, manage modules, upgrade your installation, and make changes to the Web setup of your installation.

**Important:** Always **flush the cache** after installing or upgrading Magento, or any extensions and modules.



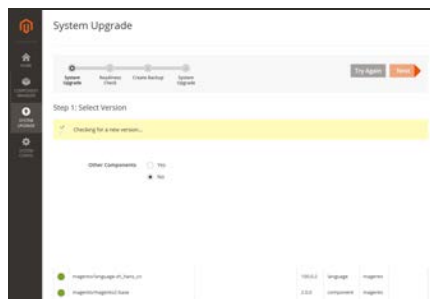
*Setup Wizard*

## Setup Tools



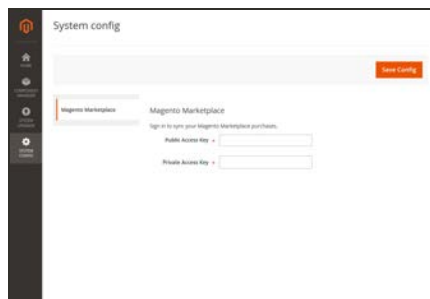
## Component Manager

Component Manager lists each component that is currently installed, and can be used to synchronize any extensions you have purchased from Magento Marketplace with your system.



## System Upgrade

The System Upgrade tool can be used to upgrade your installation of Magento. During the process, it checks your system for readiness, creates a backup, and then upgrades your system.



## System Config

The System Config tool uses the public and private keys from your Marketplace account to synchronize web setup operations.

# Component Manager

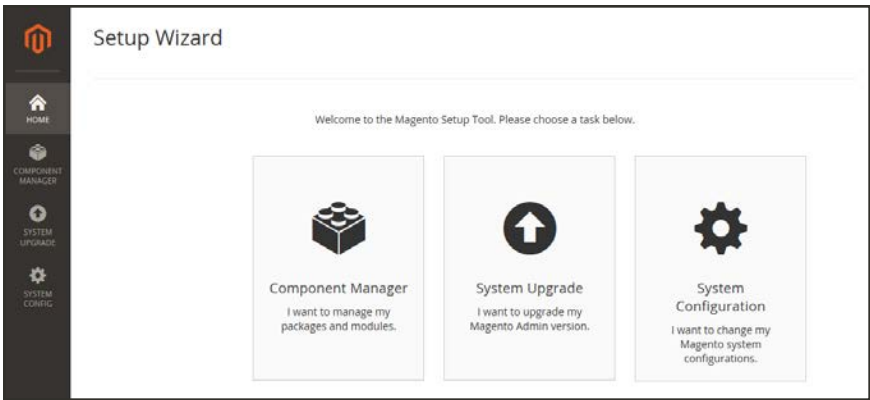
Installing an extension is a three-step process that should take place during off-peak hours. Before the extension is installed, your store is put into maintenance mode, checked for readiness, and backed up. After the extension is installed, it must be configured for your store according to the developer’s instructions. To learn more, see [Marketplace User Guide](#).

Before you begin, make sure that your system meets Component Manager prerequisites. To learn more, see [Component Manager and System Upgrade Guide](#) in the developer documentation.

**Important:** Always **flush the cache** after installing or upgrading Magento, or any extensions and modules.

## To install an extension:

- 1. Log in to the Admin of your Magento store as a user with full administrator rights.
- 2. On the Admin sidebar, tap **System**. Then under **Tools**, choose **Web Setup Wizard**.



Web Setup Wizard

- 3. Tap **Component Manager**. Then, click the **Sign In** link in the upper-right corner.



Component Manager

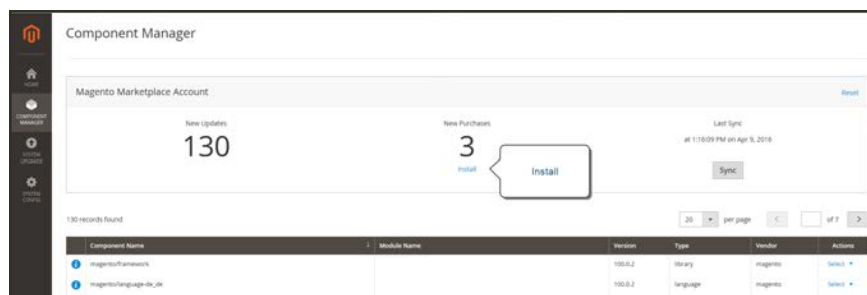


- When prompted, paste the **Public Access Key** and **Private Access Key** from your Marketplace account. Then, tap **Sign In**. To learn more, see [Magento 2 Access Keys](#) in the Marketplace User Guide.



*Paste Access Keys*

- To synchronize Component Manager with your Marketplace purchases, tap **Sync**. It might take a few minutes. When the process is complete, the number of new purchases appears with the date and time the store was last synchronized.



*Component Manager*

- In the Marketplace Purchases section under **New Purchases**, click **Install**.
- In the Extensions Grid, mark the checkbox of the extension you want to install. Then in the **Action** column, click the **Install** link for the item.



*Extensions Grid*

- We're almost done! Follow these steps to complete the installation:

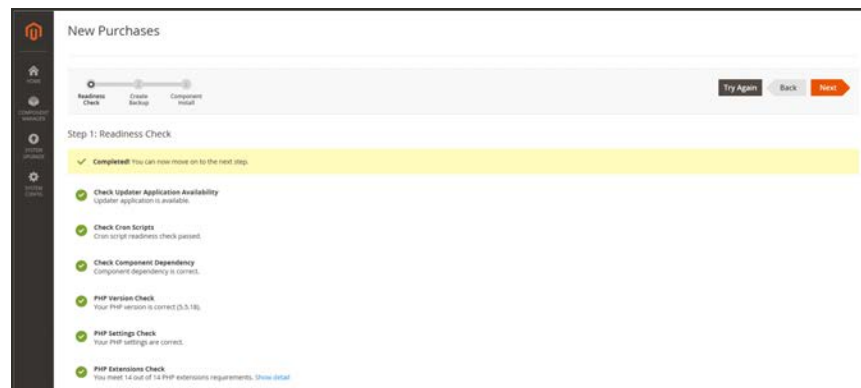
## Step 1: Readiness Check

1. Before the installation begins, your store environment must be checked for compatibility. When ready to begin, tap **Start Readiness Check**. The progress indicator shows where you are in the process.



*Readiness Check*

2. When the Readiness Check completes successfully, tap **Next**.



*Readiness Check Complete*

## Step 2: Create Backup

1. Your store will be put in maintenance mode while the backup is created. When you are ready to begin, tap **Create Backup**. Then, wait a few minutes for the backup to complete.



*Backup Complete*

2. You can see the path to the backup file at the bottom of the report. When the backup is complete, tap **Next**.

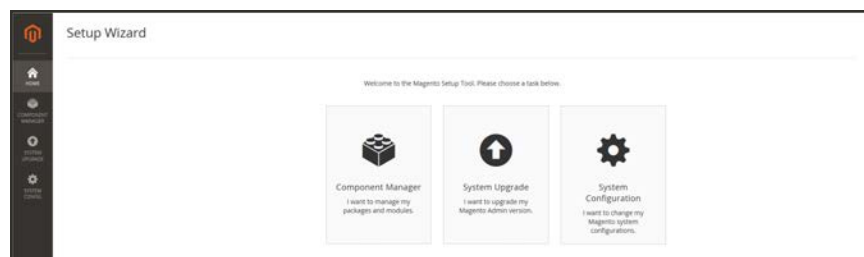
### Step 3: Component Install

1. When you are ready to begin, tap **Install**. Then, wait a few moments for the installation to complete.



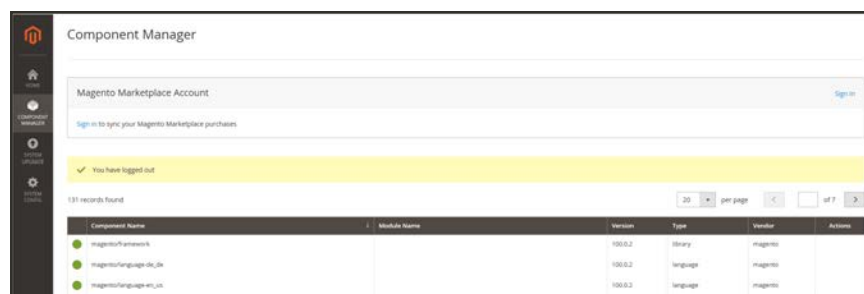
*Installation Complete*

2. When complete, tap **Back to Setup Tool**. Then, tap the **System Configuration** tile.



*Setup Wizard*

3. In the upper-right corner of Component Manager, click the **Reset** link to log out.



*Logged Out*

### Step 4: Configure the Extension for Your Store

1. Log in to the Admin of your store.
2. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.

3. In the panel on the left, find the new tab for the extension you installed. Then, follow the instructions from the extension developer to complete the configuration.
4. **Flush the cache** after installing and enabling the extension.

## System Upgrade

Your Magento installation can be upgraded from the Admin of your store, using the Web Setup Wizard. However, developers who work from the command line usually prefer to upgrade Magento using Composer. We also recommend reviewing the DevDocs [Software Upgrade Guide](#).

### Upgrade Guidelines

- ☒ We strongly recommend reviewing the latest [release notes](#) and [system requirements](#).
- ☒ For Magento Enterprise, only the primary Magento account holder is authorized to download code from the Magento repository.
- ☒ The [access keys](#) that are required to download code from the repository must be generated from the Magento account of the primary Admin user.
- ☒ After the access keys are generated, the merchant or developer with [shared access](#) to the account must submit a Support ticket to request authorization for a download of the latest version of Magento Enterprise.

### Caching and Reindexing

Always flush the cache when upgrading from one version of Open Source or Commerce to another. Two upgrade examples include: upgrading from Magento Open Source 2.0.X to 2.1.X and upgrading from Magento Open Source 2.1.X to Magento Commerce 2.1.X.

**Important:** Always [flush the cache](#) after installing or upgrading Magento, or any extensions and modules.

### Step 1: Generate the Access Keys

1. Log in to your Magento account.
2. Click the **Marketplace** tab. Then under My Products, click **My Access Keys**.
3. On the **Magento 2** tab, click **Create a New Access Key**.
4. Assign a name for the key, and tap **Generate New**.
5. At the top of the My Access Keys page, click **My Account** to return to your Magento account.

## Step 2: Request Authorization from Support

1. From your Magento account, click the **Magento** tab.
2. In the panel on the left, choose **Support**. Then, do the following:
  - a. In the Support Ticket section, click **Open New Ticket**.
  - b. Complete the form, and **Submit**.

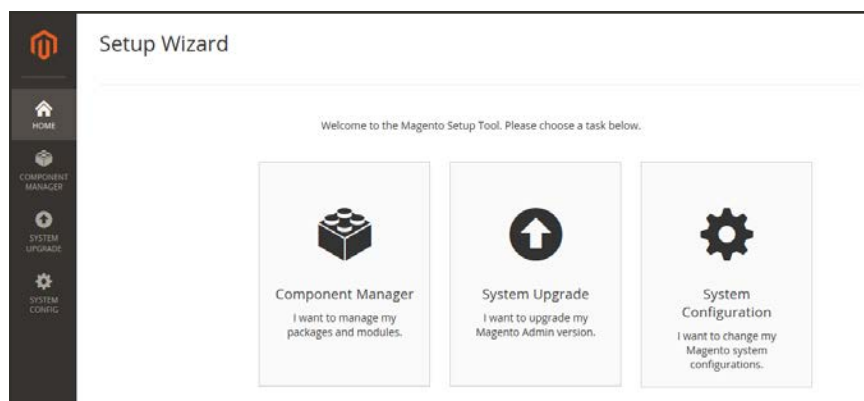
## Step 3: Upgrade Magento

When you receive notification that the upgrade is authorized, do the following:

1. Log in to the Admin of your Store as the primary Admin user.

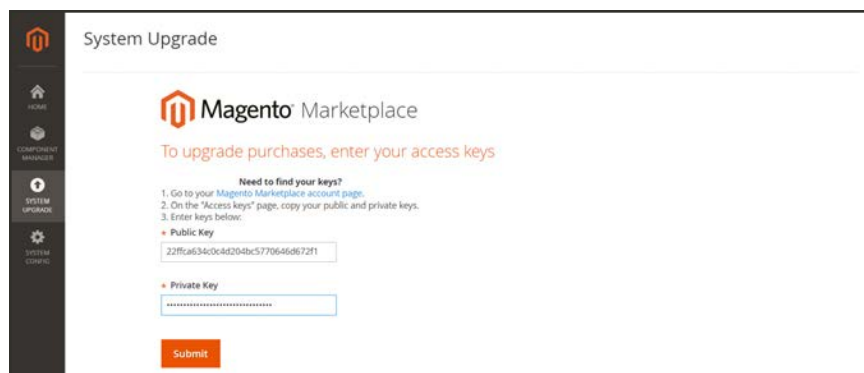
To ensure the fastest upgrade, verify that Cron is configured to run every minute.

2. On the Admin sidebar, tap **System**. Then under **Tools**, choose **Web Setup Wizard**.



*Web Setup Wizard*

3. Tap **System Upgrade**.



*System Upgrade*

4. If available, your **Public Access Key** appears in the form. Follow the instructions to paste the matching **Private Access Key** from the Marketplace tab of your Magento account.
5. Tap **Submit**, and do the following:
  - a. During Step 1 of the system upgrade, your current installation is analyzed. If your installation includes extensions and **Other Components**, select the “Yes” option.

If a more recent version is available, you will continue to the next step.



*Step 1: Select Version*

- b. During the Readiness Check, the environment is verified for the required PHP version, settings, and extensions, and file permissions.

If your system passes the Readiness check, click **Next** to continue.
  - c. Continue to follow the prompts to create a backup of your system, and to upgrade your Magento installation.
6. Flush the **cache** and **reindex** when complete.

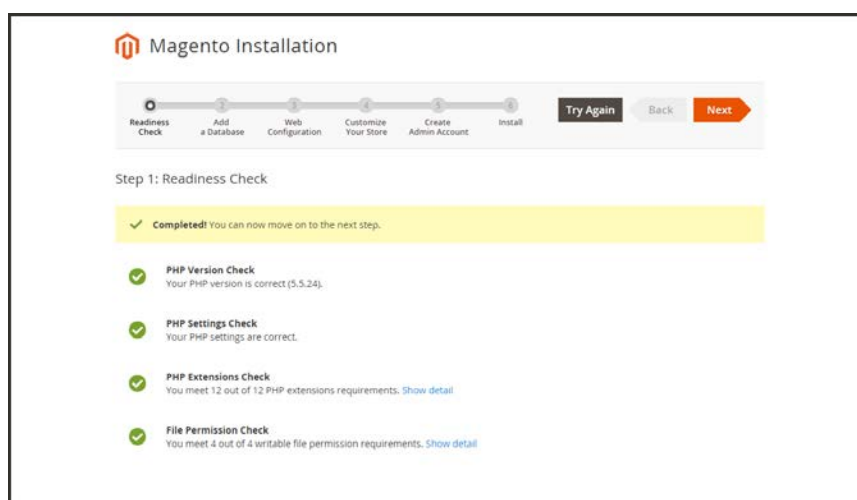
## Web Setup

Web Setup is the second part of the Magento installation that checks system readiness, establishes the database connection, and creates the initial Admin account. The following steps give an overview of the process that takes place at the end of the installation.

### Step 1: Readiness Check

1. To verify that your system meets the system requirements, tap **Start Readiness Check**.
2. When the results appear, tap **Details** for more information. Then, do one of the following:
  - If your system fails the readiness check, correct the issue and tap **Try Again**.
  - If your system meets the requirements, tap **Next**.

For technical information, see [Installation quick reference \(tutorial\)](#) in the developer documentation.



*Readiness Check*

### Step 2: Add a Database

1. To change the MySQL database or update the credentials, do the following:
  - a. Enter the **Database Server Host**. If the database resides on the same server as the Magento code, enter “localhost.”
  - b. Enter the **Database Server Username**.
  - c. Enter the **Database Server Password**.
  - d. Enter the **Database Name**.
  - e. If applicable, enter the **Table prefix**.

2. When complete, tap **Next** . Your credentials must be correct to continue to the next step.

**Magento Installation**

Step 2: Add a Database

Database Server Host: localhost

Database Server Username: root

Database Server Password: (not always necessary)

Database Name: magento

Table prefix: (optional)

Back Next

*Add a Database*

### Step 3: Web Configuration

1. Under Web Configuration, do the following:
  - a. In the **Your Store Address** field, enter the full URL of your Magento store.
  - b. In the **Magento Admin Address** field, enter the full URL of the Magento Admin.
2. Expand ☺ the **Advanced Options**, and do the following:
  - a. Mark the checkbox of the **HTTPS Options** that apply to your system:
    - Use HTTPS for Magento Storefront
    - Use HTTPS for Magento Admin
  - b. To enable your server to use **Apache Rewrites**, mark the checkbox.
  - c. Mark the checkbox of the **Encryption Key** setting that applies to your system:
    - I want to use a Magento generated key.
    - I want to use my own encryption key.



The screenshot shows the 'Step 3: Web Configuration' screen of the Magento Installation wizard. At the top, a progress bar indicates the steps: 1. Readiness Check, 2. Add a Database, 3. Web Configuration (current), 4. Customize Your Store, 5. Create Admin Account, and 6. Install. Below the progress bar, the 'Your Store Address' is set to 'http://10.9.220.154/stores/m2/magento2/'. The 'Magento Admin Address' is set to 'http://10.9.220.154/stores/m2/magento2/' with the username 'admin'. Under 'Advanced Options', the 'HTTPS Options' are unchecked. 'Apache Rewrites' is checked. For 'Encryption Key', the option 'I want to use a Magento generated key' is selected.


### Web Configuration

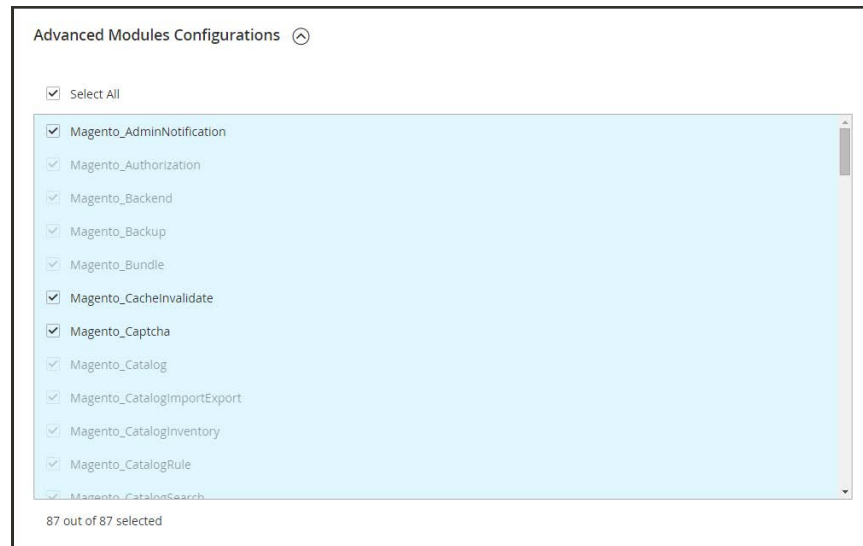
## Step 4: Customize Your Store

1. To install or reinstall the **Sample Data**, do the following:
  - a. To create a sample store with sample products, mark the **Use Sample Data** checkbox.
  - b. If you are reinstalling the sample data, also mark the **Clean up automatically** checkbox.
2. Set **Store Default Time Zone** to the correct time zone for your locale.
3. Set **Store Default Currency** to the default currency that you accept as payment.
4. Set **Store Default Language** to the primary language of your store.

The screenshot shows the 'Step 4: Customize Your Store' screen of the Magento Installation wizard. The progress bar at the top shows steps 1 through 6, with 'Customize Your Store' (step 4) being the current step. The 'Sample Data' section has a description and a checked checkbox for 'Use Sample Data'. Below this, there is a note about cleaning up automatically and an unchecked checkbox for 'Clean up automatically'. The 'Store Default Time Zone' is set to 'GMT+00:00 (UTC)', 'Store Default Currency' is set to 'US Dollar (USD)', and 'Store Default Language' is set to 'English (United States)'. At the bottom, there is a link for 'Advanced Modules Configurations'.

### Customize Your Store

5. (Optional) Expand  the **Advanced Modules Configuration**, and do the following:
  - a. To install only specific modules, clear the **Select All** checkbox.
  - b. In the list, select the checkbox of each module you want to install.



*Advanced Modules Configuration*

6. When complete, tap **Next**.

### Step 5: Create Admin Account

1. Enter a **New Username** for the Admin account.
2. Enter a **New E-Mail** for the Admin account.
3. Enter a **New Password** for the Admin account. Then in the **Confirm Password** field, enter your new password again.
4. When complete, tap **Next**.

The screenshot shows the 'Magento Installation' progress bar with six steps: 1. Readiness Check, 2. Add a Database, 3. Web Configuration, 4. Customize Your Store, 5. Create Admin Account (current step), and 6. Install. Below the progress bar are 'Back' and 'Next' buttons. The main content area is titled 'Step 5: Create Admin Account' and includes the instruction 'Create a new Admin account to manage your store.' There are four input fields: 'New Username' with the value 'admin', 'New E-Mail' with the value 'janedoe@example.com', 'New Password' with masked characters '\*\*\*\*\*', and 'Confirm Password' with masked characters '\*\*\*\*\*'.

*Create Admin Account***Step 6: Install**

1. When you are ready to complete the setup, tap **Install Now**.

The screenshot shows the 'Magento Installation' progress bar with six steps: 1. Readiness Check, 2. Add a Database, 3. Web Configuration, 4. Customize Your Store, 5. Create Admin Account, and 6. Install (current step). Below the progress bar are 'Back' and 'Next' buttons. The main content area is titled 'Step 6: Install' and includes the message 'You're ready!'. There is a single orange button labeled 'Install Now'.

*Install*

2. When the installation completes, a page appears with your Magento Admin and database credentials, but without the passwords. You can print the page and keep it for your records. Then, do one of the following:
  - Launch Magento Storefront
  - Launch Magento Admin
3. If the installation fails to complete, view the **Console Log** to learn more. Then, correct the problem and try again.
4. **Flush the cache** and **reindex** after installing Magento.

## A little Housekeeping

After Setup is complete, do the following to set the recommended permissions for all files and folders in your Magento 2 installation. These instructions require using the command line which may need developer assistance.

To learn more, see [File systems access permissions](#).

1. Change to the Web user who has full permissions to the Magento2 folder. (For example, apache or root.)

```
su - apache
```

2. Change directories to the Magento2 folder, and set the following permissions. You can copy the code, and paste it as a single command.

```
find . -type d -exec chmod 700 {} \; && find . -type f -exec chmod 600 {} \;
&& chmod +x bin/magento
```



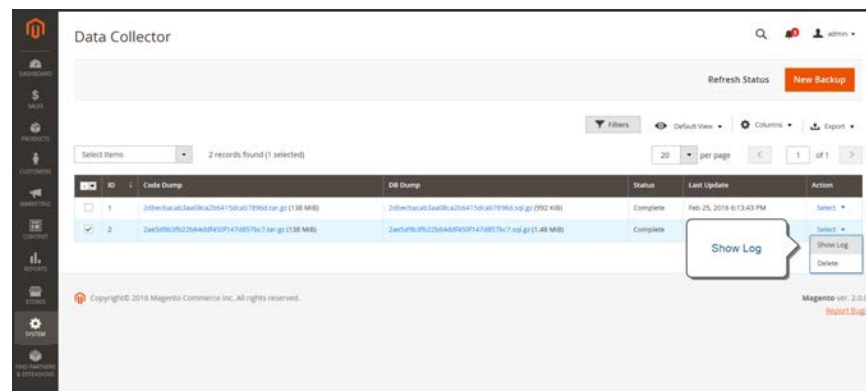
## **CHAPTER 94:**

# **Support**

The Support Tools are designed to identify known issues in your system. They can be used as a resource during the development and optimization processes, and as a diagnostic tool to help our support team identify and resolve issues.

## Data Collector

Data Collector gathers the information about your system that is needed by our Support team to troubleshoot issues with your Magento installation. The backup that is created takes several minutes to complete, and includes both a code and database dump. The data can be exported to a CSV or Excel XML file.



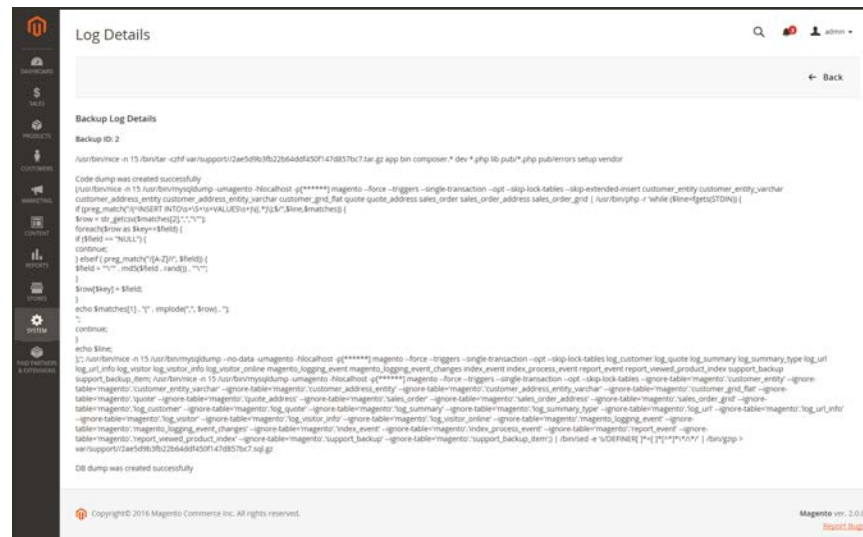
*Data Collector*

### To run Data Collector:

1. On the Admin sidebar, tap **System**. Then under **Support** choose **Data Collector**.
2. In the upper-right corner, tap **New Backup**.

It will take a few minutes to generate the backup. When complete, the backup appears in the Data Collector grid.

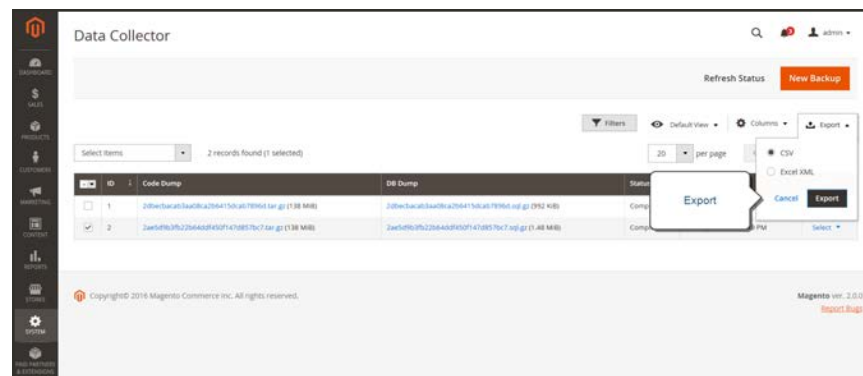
3. To view a log with the backup details, do the following:
  - a. In the **Action** column, select **Show Log**.
  - b. Click **Back** to return to the grid.



### Log

## To export backup data:

1. In the first column mark the checkbox of the backup to be exported.
2. On the **Export** menu, choose the format of the export data.



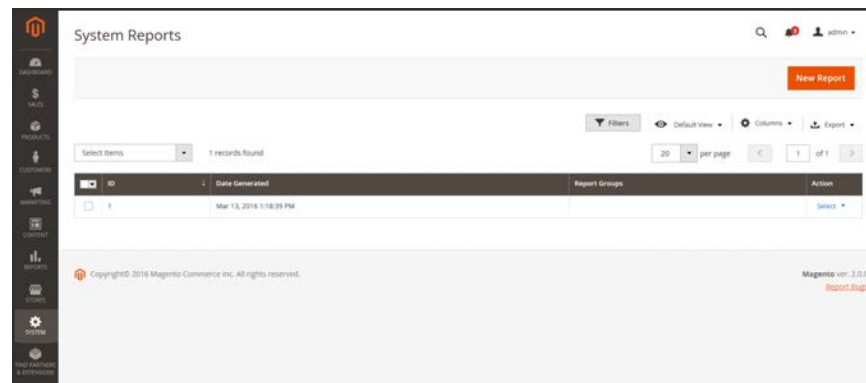
### Export Format

3. Look for the download message at the bottom of the screen, and **Save** the file.

## System Reports

The system reporting tool gives you the ability take periodic full, or partial, snapshots of the system, and save them for future reference. You can compare performance settings before and after code development cycles, or changes to server settings. The system reporting tool can dramatically reduce the time spent preparing and submitting the information required by Support to begin an investigation.

From the System Reports grid, you can view and download existing reports, delete reports, and create new reports.



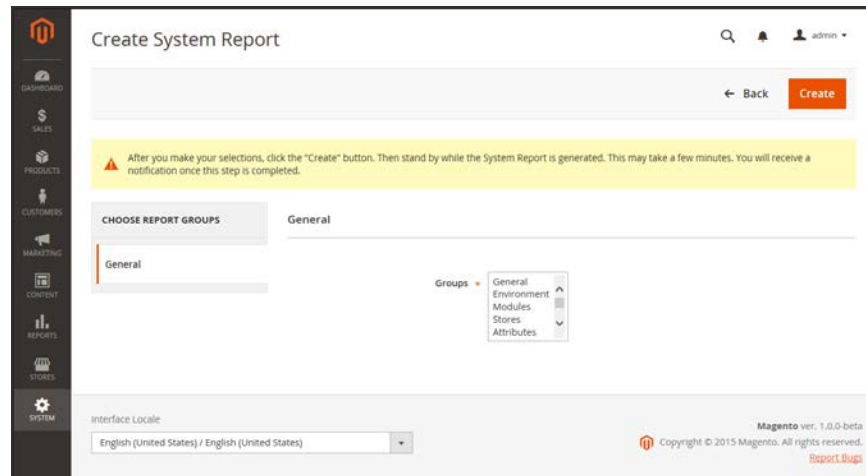
*Manage System Reports*

### To access system reports:

1. On the Admin sidebar, tap **System**. Then under **Support**, choose **System Report**.
2. To generate a new system report, tap **New Report**. Then, do the following:
  - a. In the **Groups** list, select each set of information that you want to include in the report. By default, all groups are selected.
  - b. In the upper-right corner, tap **Create**.  
It might take a few minutes for the report to generate.
3. To view the report, click the **View** link at the end of the row.
4. To download a report, click the **Download** link at the end of the row.
5. To create a new report, click the **New Report** button. Then, do the following:



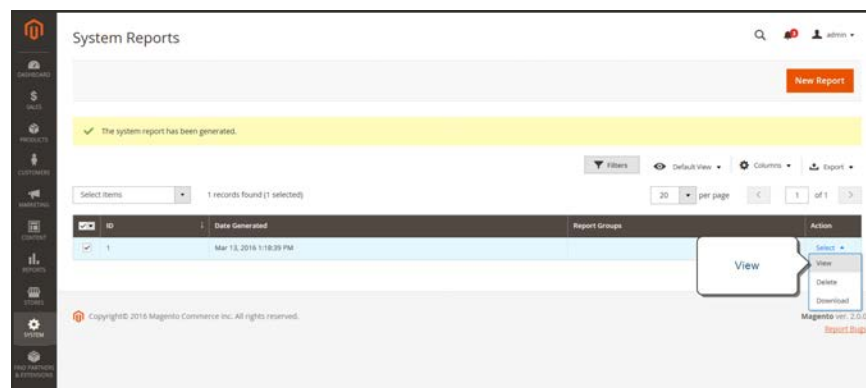
- a. In the list, select the **Groups** of system information that you want to include in the report.




*Select Groups*

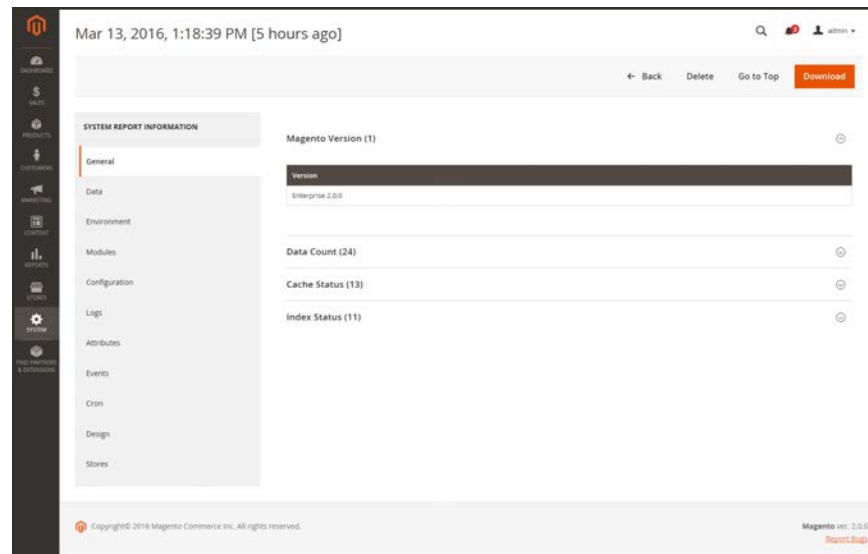
- b. Tap **Create** to generate the report.

It might take a few minutes for the report to generate, depending on the number of report types selected. When the report is ready, it appears at the top of the grid with the date and time generated..



*View System Report*

6. In the **Action** column of the grid, select one of the following:
- View
  - Delete
  - Download
7. In the panel on the left, expand  each section of the report to view the detail.



*General System Report Information*

8. To save the report as an HTML file, tap **Download**. Then save the file to your computer.
9. To view the report, open the download file in a browser. In the header, tap the control to jump to a specific section of the report.

## System Reports

REPORT GROUP	INFORMATION INCLUDED
General	Magento Version Data Count Cache Status Index Status
Environment	Environment Information MySQL Status
Modules	Custom Modules List Disabled Modules List All Modules List
Configuration	Configuration Data from app/etc/env.php Shipping Methods Payment Methods Payments Functionality Matrix
Logs	Log Files Top System Messages Today's Top System Messages Top Debug Messages Today's Top Debug Messages Top Exception Messages Today's Top Exception Messages
Attributes	User Defined Eav Attributes New Eav Attributes Entity Types All Eav Attributes Category Eav Attributes Product Eav Attributes Customer Eav Attributes Customer Address Eav Attribute RMA Item Eav Attributes
Events	Custom Global Events Custom Admin Events Custom Frontend Events

**System Reports (cont.)**

REPORT GROUP	INFORMATION INCLUDED
	Customer Doc Events Custom Crontab Events Custom REST Events Custom SOAP Events Core Global Events Core Admin Events Core Frontend Events Core Doc Events Core Crontab Events Core REST Events Core SOAP Events All Global Events All Admin Events All Frontend Events All Doc Events All REST Events All SOAP Events
Cron	Cron Schedules by status code Cron Schedules by job code Errors in Cron Schedules Queue Cron Schedules List Custom Global Cron Jobs Custom Configurable Cron Jobs Core Global Cron Jobs Core Configurable Cron Jobs All Global Cron Jobs All Configurable Cron Jobs
Design	Adminhtml Themes List Frontend Themes List
Stores	Website Tree Websites List Stores List Store Views List

# Appendices

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- Release Notes
- Change Log
- Glossary
- Configuration Reference



## APPENDIX A:

# Release Notes

Release notes provide a detailed description of each product release, with links to additional technical information, installation instructions, and support resources. For details about the most current and past releases, see [Release Information](#).

As a best practice, we recommend that you keep your Magento 2.x installation up to date, so you can benefit from the latest features and advancements.

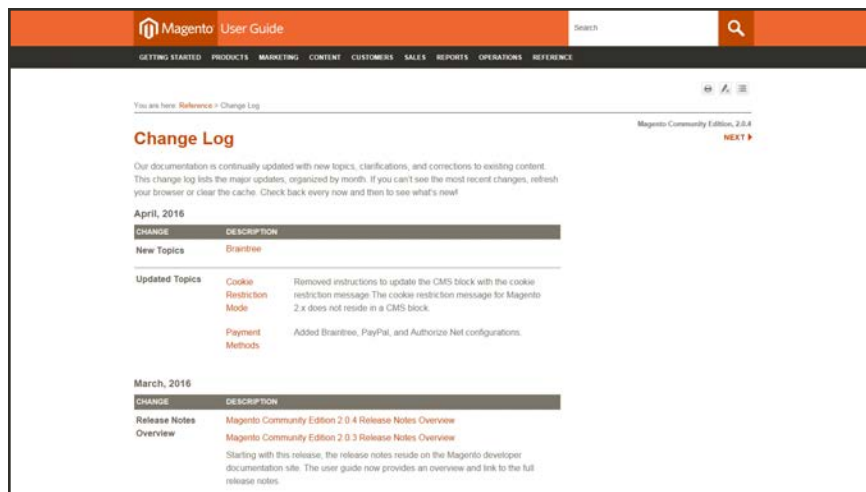




## APPENDIX B:

# Change Log

Our documentation is continually updated with new topics, and corrections or clarifications to existing content. The **Change Log** in the online user guide lists the major updates, organized by month. If you can't see the most recent changes, refresh your browser or clear the cache. Check back every now and then to see what's new!



The screenshot shows the 'Change Log' page in the Magento User Guide. The page has an orange header with the Magento logo and 'User Guide' text. Below the header is a navigation bar with links: GETTING STARTED, PRODUCTS, MARKETING, CONTENT, CUSTOMERS, SALES, REPORTS, OPERATIONS, and REFERENCE. The main content area has a breadcrumb trail 'You are here: Reference > Change Log'. The title 'Change Log' is prominently displayed. Below the title, a paragraph explains that the log lists major updates organized by month and advises refreshing the browser or clearing the cache if the most recent changes are not visible. The log is organized by month, with 'April, 2016' and 'March, 2016' sections. Each month section contains a table with two columns: 'CHANGE' and 'DESCRIPTION'. Under 'April, 2016', there is a 'New Topics' section with a link to 'Braintree' and an 'Updated Topics' section with links to 'Cookie Restriction Mode' and 'Payment Methods'. Under 'March, 2016', there is a 'Release Notes Overview' section with links to 'Magento Community Edition 2.0.4 Release Notes Overview' and 'Magento Community Edition 2.0.3 Release Notes Overview'. A 'NEXT' link is visible in the top right corner of the content area.

CHANGE	DESCRIPTION
New Topics	<a href="#">Braintree</a>
Updated Topics	<a href="#">Cookie Restriction Mode</a>
	<a href="#">Payment Methods</a>

CHANGE	DESCRIPTION
Release Notes Overview	<a href="#">Magento Community Edition 2.0.4 Release Notes Overview</a>
Overview	<a href="#">Magento Community Edition 2.0.3 Release Notes Overview</a>

## Change Log



## APPENDIX C:

# Glossary

### A

---

**above the fold**

The web page content that is immediately visible in the browser window; section of a page that is displayed without the need to scroll.

**Admin**

The password-protected back office of your store where orders, catalog, content, and configurations are managed.

**alt text**

The text that is displayed in place of an image when the user is unable to view the image.

**anchor text**

The visible text that is anchored to another page or page section; the literal text of a hyperlink.

**API**

Application Program Interface: A software interface that lets third-party applications read and write to a system using programming language constructs or statements.

**aspect ratio**

The proportional relationship between the width and height of an image.

**attribute**

A characteristic or property of a product; anything that describes a product. Examples of product attributes include color, size, weight, and price.

**authorization**

To give a service permission to perform certain actions or to access resources.

**average inventory cost**

Product price, less coupons or discounts, plus freight and applicable taxes. The average is determined by adding the beginning cost of inventory each month, plus the ending cost of inventory for the last month of the period.

**B**

---

**B2B**

Business to Business: A type of business transaction between two business entities that are not the final consumers of the goods or services.

**B2C**

Business to Consumer: Business transactions between a business entity and a consumer.

**banner**

Promotional graphics displayed either horizontally on the top of a web page or vertically on the left or right margins. Website advertisements are often displayed as banners.

**base currency**

The primary form of currency used in store transactions.

**base currency rate**

The base currency rate is the default for your store.

**batch processing**

To perform a task or make a change to multiple items all at once, without manual repetition.

**bounce rate**

The percentage of visitors to your site that leave without viewing any other pages.

**brand**

A unique identity that defines a particular product or group of products.

**breadcrumb**

A navigation aid that helps the user to keep track of their location within your store.

**brick and mortar**

A retail business with a permanent physical location, as opposed to being entirely virtual.

**broken link**

A hyperlink that fails to send the user to its intended web page.

**C**

---

**callout**

A term that is sometimes used to describe a block that is defined as a layout update using XML code.

**canonical URL**

The canonical meta tag redirects search engines to the correct URL, when seemingly duplicate content is encountered on the server.

**capture**

The process of converting the authorized amount into a billable transaction. Transactions cannot be captured until authorized, and authorizations cannot be captured until the goods or services have been shipped.

**cardholder**

A person who opens a credit card account and is authorized to make purchases.

**cascading style sheet**

The markup standard used to apply styles to HTML elements on the page.

**category**

A set of products that share particular characteristics or attributes.

**CCV**

Credit Card Verification code. (See CVV)

**checkout process**

The process of gathering the payment and shipping information that is necessary to complete the purchase of items in the shopping cart. In the final step, the customer reviews and places the order.

**CMS**

Content Management System: A software system that is used to create, edit, and maintain content on a website.

**complex data**

Data that is associated with multiple product options.

**complex product**

A product that requires the customer to choose from a selection of options.

**composite product**

Any product type that offers customers a choice of options.

**Content Delivery Network**

A large distributed network of servers that specializes in the high performance delivery of multi-media content.

**content marketing**

The art of promoting products or services by providing valuable information at no charge.

**conversion**

A marketing term that indicates a goal has been reached. If the goal is to sell a product, conversion is reached when a visitor to your site becomes a buyer.

**conversion rate**

The percentage of visitors who are converted into buyers.

**credit memo**

A document issued by the merchant to a customer to write off an outstanding balance because of overcharge, rebate, or return of goods.

**CSS**

Cascading Style Sheets: A style sheet language that controls the appearance of HTML documents; a way to control the appearance of text, graphics, lists, links, and all other elements on a web page.

**CSV**

Comma Separated Values: A type of file used to store data values which are separated from each other by commas.

**CVM**

Card Verification Method: A way to verify the identity of the customer by confirming a 3-digit or 4-digit credit card security code with the payment processor.

**CVV**

The Card Verification Value, also known as the Card Security Code, provides an additional level of security for online transactions.

**D**

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**domain**

The address of a website on the web; what the customer types in their browser address bar to access the store.

**double opt-in**

The process for subscribing email recipients by requiring them to take a secondary step to confirm that they want to receive emails.

**dynamic content**

A web page that displays different content depending on the user request.

**Dynamic Media URL**

A link to an image that contains a relative reference to the file location in media storage.

**E**

---

**EAV**

Entity Attribute Value

**evergreen content**

Content that has a long shelf life.

## F

---

### **FAQ**

Frequently Asked Questions.

### **favicon**

Short for favorites icon; a 16x16 or 32x32 pixel icon associated with a website; is displayed in the browser address bar and next to the site name in a bookmark list.

### **feed reader**

Software that is used to read syndicated content from RSS feeds.

### **FOB**

Freight On Board: A shipping term indicating who is responsible for paying transportation charges.

### **frontend properties**

Properties that determine the presentation and behavior of an attribute from the standpoint of the customer in your store.

### **fulfillment**

The process of managing customer shipments.

## G

---

### **gateway**

A transaction bridge between a customer and a payment processing service that is used to transfer money between the customer and the merchant.

### **gross margin**

The difference between the cost and price of a product.

## H

---

### **handle**

In programming, a name used to reference an object.

### **home page**

The first home page a visitor sees when they access your website URL. Considered the most important page on your website according to search engine indexing.

### **HTML**

HyperText Markup Language: A standard for tagging and structuring text, images, videos, and other media on a web page.

---

**I**

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**invoice**

A document that provides a detailed description of a purchase, including products purchased, quantity, price, shipping cost, sales tax, and total.

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**J**

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**JavaScript**

A scripting language used with HTML to produce dynamic effects and interactions on web pages.

**jQuery**

A popular JavaScript library that is often used to create dynamic and responsive effects.

---

**K**

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**keyword**

A term or phrase used in a search to filter for content that is of significant importance to that term or phrase.

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**L**

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**landing page**

A page on your site where a visitor arrives after clicking a link or advertisement.

**layout**

The visual and structural composition of a page.

**layout update**

A specific set of XML instructions that determines how the page is constructed.

**link juice**

The value and authority transferred from one web page to another via hyperlinks (or links). Link juice affects a website's page rank, a factor used to rank a search engine results page.

**liquid layout**

A flexible approach to web design that specifies the size and position of elements as percentages rather than as exact measurements in pixels.

**load sequence**

The order in which scripts are loaded into memory. To work correctly, some scripts must be loaded before others.

**locale**

A set of configurations that defines the user's language, country, tax rate, and other settings.

**login**

The process of signing into an online account.



## M

---

### **markdown**

The amount subtracted from the original price of a product.

### **markup tag**

A snippet of code that can be used to add functionality or content to a page.

### **media storage**

A dedicated space on the content delivery network for your store's assets.

### **merchant account**

An account with a bank or financial institution that makes it possible to accept credit card transactions.

### **meta tags**

Information in a web page that is not displayed on the page itself, but is used by search engines to determine the page title, description, and page keywords.

## N

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### **navigation**

The primary group of web page links that a customer uses to navigate around the website; the navigation links to the most important categories or pages on an online store.

## O

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### **opt-in**

The process by which a user consents to receiving emails from an online store.

## P

---

### **packing slip**

A document that is usually included in a shipped package that describes the contents. Packing slips do not include financial or account information.

### **path to purchase**

The path a prospect follows that leads to a sale.

### **payment bridge**

An application that helps merchants meet PCI- DSS requirements.

### **payment gateway**

A service that charges your customers' credit cards and sends the funds to your merchant account, for deposit into your business bank account.

### **Payment Gateway**

A third-party service that processes transactions for external payment methods.

**Payment Method**

A way for the customer to pay for the merchandise in your store. Payment methods can be internal or external. The Payment Methods section of the System Configuration includes all basic payment methods and gateways.

**PCI**

Payment Card Industry: Refers to debit and credit cards and their associated businesses.

**price markup**

A percentage added to the cost of an item to determine the retail price.

**privacy policy**

A document that explains the merchant's policies for handling customer information.

**purchase order (PO)**

A written sales contract between a buyer and seller that describes the merchandise or service to be purchased from a vendor.

**R**

---

**redirect**

A method used to alert browsers and search engines that a page has been moved. 301 Redirect: Permanent change 302 Redirect: Temporary change

**relative link**

A hyperlink that includes only the address of the linked page that is relative to the linking page, rather than the full URL.

**return policy**

A document that explains the merchant's rules regarding the return of products by customers.

**robots.txt**

A file placed on a website that tells search engine crawlers which pages not to index.

**RSS feed**

Really Simple Syndication: A technology that creates web content syndication and allows web users to subscribe to product feeds, websites, and blogs.

**S**

---

**SaaS**

Software as a Service: A software delivery model where the vendor provides the software and hosting environment, and customers pay for the service by subscription or per use.

**Sass/Compass**

A CSS pre-compiler that provides organizable, reusable CSS.

**security certificate**

Information that is used by the SSL protocol to establish a secure connection.

**SEO**

Search Engine Optimization: The process of improving a website's search engine rankings in order to increase valued visitors.

**SERP**

Search Engine Results Page

**settlement**

Settlement occurs when the acquiring bank and the issuer exchange funds and the proceeds are deposited into the merchant account.

**shipping carrier**

A company that transports packages. Common carriers include UPS, FedEx, DHL, and USPS.

**shopping cart**

A grouping of products that the customer wishes to purchase at the end of their shopping session.

**sidebar**

The right or left column of a two-column page layout.

**sitemap**

A page that provides search engines with an efficient, alternate route through your site.

**SKU**

Stock Keeping Unit: A number or code assigned to a product to identify the product, options, price, and manufacturer.

**splash page**

A promotional page with a product or advertisement; normally displayed before the home page.

**SSL certificate**

A validation and security mechanism that identifies the merchant and encrypts credit card and other sensitive information.

**static block**

A fixed content block that can be displayed on various content pages in a store.

**static content**

Content that does not change frequently. See also dynamic content.

**static files**

The collection of assets, such as CSS, fonts, images, and JavaScript that is used by a theme.

**T**

---

**theme**

A package that contains graphics and appearance information, and customizes the look and feel of the store.

**transactional email**

A notification email sent to the customer when a transaction is processed.

**transactional emails**

An automated email message that is sent in response to a specific event or transaction.

**U**

---

**URL**

Uniform Resource Locator: The unique address of a page on the internet.

**usability**

Refers to the degree to which a product or service is easy to use by its customers.

**W**

---

**widget**

A prepared snippet of code that adds functionality and/or dynamic effects to your store.

**WYSIWYG**

What You See Is What You Get: An editor that displays formatted text as it will appear in its final published form.

**X**

---

**XML**

Extensible Markup Language: A markup format derived from SGML that it used to format information for publication and distribution.

## APPENDIX D:

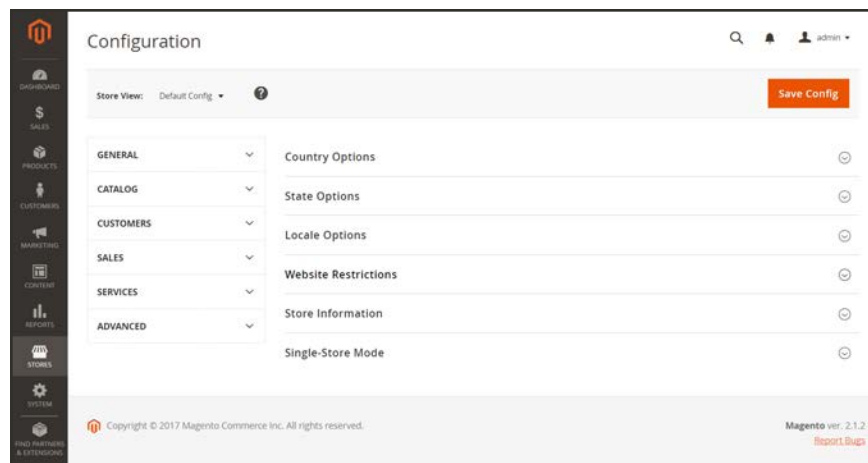
# Configuration Reference

This reference has field descriptions for every configuration setting in Magento Commerce. To learn how to apply configuration settings to specific store views, see: [Scope](#).

From the HTML version of the guide, you can drill down through any section of the reference, and follow the links to corresponding topics in the user guide. From step-by-step instructions, click any linked caption below a screenshot to jump to the field descriptions.

Follow these links for the corresponding section in the online reference:

- [General](#)
- [Security](#)
- [Catalog](#)
- [Customers](#)
- [Sales](#)
- [Services](#)
- [Advanced](#)



*Configuration*



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